

# Making the Most of the Sabbatical Experience



# Discussion Topics

- Core Sabbatical Principles
- Power of a Sabbatical
- Common Concerns
- Key Pieces of Advice
  - Preparing for Sabbatical
  - During Sabbatical
  - Re-Entry
- Budgeting for Sabbatical

# Core Sabbatical Principles

## 1. 100% Disconnect

- Executive Director **completely disconnects** from organization and professional activities

## 2. Protracted Break

- **~3 consecutive months** in duration

## 3. Leadership from Within

- **Internal staff** (individual or team) lead in the ED's absence; not outside interim director

## 4. Mentality of Thrive vs. Survive

- Sabbatical as an opportunity to **grow leadership capacity** and **make thoughtful organizational shifts**—  
*it's not just about keeping the ED's seat warm*

# Power of a Sabbatical

*Sabbatical has the potential to be a **lifechanging experience** for the Executive Director, and a **transformational opportunity** for the entire organization.*

## **Evaluation<sup>1</sup> shows that sabbaticals:**

- Re-invigorate and help retain nonprofit executive directors
- Increase organizational capacity – especially in strengthening the capacity of the senior-level team and in creating more distributed leadership
- Shift the executive director’s perspective from “daily management” to leaning deeper into the most meaningful work at hand
- Create a permanent shift in the culture of work/life balance for both the executive director and the organization’s staff
- Enhance succession planning by acting as dry run for eventual transitions
- Strengthen the effectiveness of the governing board

<sup>1</sup> From Creative Disruption to Systems Change: A 20-Year Retrospective on the Durfee Foundation Sabbatical Program, September 2017.

# Common Concerns

- The **unknown**. . . something anticipated will come up (e.g., HR situation, new opportunity)
- Staff capacity to handle **additional workload**
- Concerns about **how well the team will work together**
- Concerns about **board relationships** and **external relationships** currently held by ED
- That the ED will have **difficulty disengaging. . . and re-entering**

# Advice: Preparing for Sabbatical

- **Set intentions for the sabbatical:** *How do you want to leverage this experience for individual and team leadership growth, and to make organizational shifts?*
- Determine the **interim leadership structure** –either a team or single acting ED
- Retain a **coach** as early as possible to support the ED and team before, during, and after sabbatical. Coach can be very helpful with:
  - Setting intentions and identifying key concerns and opportunities
  - Developing tactical plans for sabbatical
  - Identifying practices to “try on” during the sabbatical period
  - Supporting the team during sabbatical if challenging situations arise
  - Supporting ED and team with re-entry, including facilitating learning from the experience

# Advice: Preparing for Sabbatical

- Commit to **100% disconnect**
  - Decide what kind of **extreme emergency** would warrant contacting the ED during sabbatical
  - **Turn off** access to ED's work email account, get a "burner" phone, and have a plan for how to handle social media
  - Make sure that **key stakeholders** know ED will be on sabbatical and who to contact
  - Manage expectations of **professional colleagues** within the ED's friend network

# Advice: Preparing for Sabbatical

- Clarify **ED responsibilities** that senior leaders will assume, chain of command, and how decisions will be made.
  - Think through the **everyday**, as well as **worst-case** and **what-if** scenarios.
- **Prepare the board** about roles and responsibilities of the interim leadership team. . . and **prepare the leadership team** for their increased role with the board during sabbatical.
  - Board chair (or other designated board liaison) should be prepared to pay special attention to the interim leadership team during the absence.
  - If Board members are used to being in regular communication with the ED, let them know that they should not have the same expectation of interim leadership team.

# Advice: Preparing for Sabbatical

- Have senior team members represent the organization at **outside meetings** that ED would normally attend.
- In the last month before sabbatical, allow the interim leader/team to **make the decisions they will need to continue to make** in the ED's absence.
- Designate someone to **sort through ED's work emails and correspondence and reroute them** during sabbatical. The goal should be that the ED does not return to a pile of unfinished business, but that business as usual continued without the ED.
- Prepare in advance for **ED re-entry**, including how the ED will be briefed upon return.
- Treat the **last week before sabbatical as a transition week**, with ED out of the office but still available should final questions arise.

# Advice: During Sabbatical

## For the Executive Director

- Get out of town in the first couple of weeks, even for a short trip, to help disconnect.
- Don't over-plan the time on sabbatical. Consider spending some time by yourself.
- Don't socialize with your work friends during sabbatical.

## For the Leadership Team

- Pay attention to what you're learning and any changes you may want to hold onto when the ED returns. Talk about it in real time.
- Seek the support you need from within the team, the board, and your coach.

# Advice: Re-Entry

- Establish a **“stealth week”** (or two) for the ED’s return when back in the office but not yet attending meetings or taking appointments. Consider working part-time for the first week back and/or coming back mid-week.
  - This will allow time for the ED to re-enter without too much stress, and to provide the **time and space needed to debrief with the team**. Start with a high-level overview before diving into the details.
  - ED’s first order of business is to be **“chief listening officer”**
- Create meaningful opportunities to discuss **organizational shifts, shared leadership, and redefinition of responsibilities**. Having your coach facilitate these discussions can be very helpful.
- Consider creating a **sabbatical policy** for the organization if you don’t already have one.

# Budgeting for Sabbatical

## In budgeting for a sabbatical, **core costs** include:

- Three months of salary & benefits coverage for the ED
- ED's sabbatical expenses (e.g., travel costs)
- Coaching and support for the ED and team before, during, and after sabbatical
- We also recommend providing a stipend/bonus for interim leadership team members who will be assuming additional responsibilities in the ED's absence

## The **O2 Sabbatical Award** provides each organization with the following:

- **\$50,000** toward the cost of the executive director's three-month sabbatical, which organizations have the flexibility allocate between the ED's salary & benefits and sabbatical expenses
- **\$15,000** in flexible funding to support staff professional development, as well as stipends for the interim leadership team
- **25 hours of coaching** (the current Bay Area rate for experienced coaches is ~\$300-\$325/hour)