Strengthening Leaders and Building Capacity Through Nonprofit Sabbaticals:

A Four-Year Summary of Fieldstone Leadership Network's Clare Rose Sabbatical Program

April 2019

FieldStone
LEADERSHIP NETWORK

University *of* San Diego
**SCHOOL OF LEADERSHIP
AND EDUCATION SCIENCES**
THE NONPROFIT INSTITUTE

Study funded by: The Clare Rose Foundation

About the Clare Rose Foundation
The Clare Rose Foundation is a small family foundation committed to honoring the values of its founder Valerie Vincent by supporting organizations and causes that foster well-being and strengthen communities. The foundation's grant-making has focused on the areas of education, health, and social services.

FieldStone
LEADERSHIP NETWORK

About the Fieldstone Leadership Network
The mission of the Fieldstone Leadership Network is to provide reciprocal learning opportunities which build, deepen and sustain personal and professional capabilities and relationships among nonprofit professionals so they are better able to lead, collaborate and problem solve.

University *of* San Diego
SCHOOL OF LEADERSHIP AND EDUCATION SCIENCES

About The Nonprofit Institute
The Nonprofit Institute is committed to providing education, training and research to build leaders and strengthen organizations that help meet critical community needs.

About The Caster Family Center for Nonprofit and Philanthropic Research
The mission of the Caster Center is to provide research, evaluation, and consulting services that build the leadership and strategic- and evaluative-thinking capacity of local nonprofits, as well as to be the leading source of information, data, and research on the local nonprofit sector.

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OVERVIEW

> *"The Sabbatical was an amazing experience. I'm glad that our organization, team and [the CEO] had the opportunity to participate in it. It allowed for us to be challenged and work more strongly as a team, and to discover our deficits and address them."*
> – Staff, Interim Leader, Year 4

Increased demand for services, dependence on outside funding sources, high workloads, lack of personnel, and the often-subsequent burnout of nonprofit leaders threatens the ability of nonprofit organizations to fulfill their missions. In order to address these challenges, the Fieldstone Leadership Network and the Clare Rose Foundation partnered to launch the Fieldstone Leadership Network's Clare Rose Sabbatical Program (subsequently referred to as the Sabbatical Program).

Shortly after the Sabbatical Program began in 2014, The Nonprofit Institute's Caster Family Center for Nonprofit and Philanthropic Research (Caster Center) at the University of San Diego was commissioned to conduct a 5-year systematic evaluation of the program. This report summarizes the cumulative findings from the first four years (2014-2018). Between November 2014 and November 2018, the Caster Center evaluation team conducted interviews and surveys with Executive Directors (EDs), staff, and boards from all 15 participating organizations, as well as interviews with the nonprofit consultant who supported the organizations. The detailed methodology and logic model are included in Appendices A-C, and the ED, Board and Staff survey responses are summarized in Appendices D-E.

The Sabbatical Program supports the well-being of EDs by providing them with an opportunity to temporarily disconnect from their organizations. Simultaneously, it is designed to build organizational capacity and elevate leadership within organizations through staff and board who provide oversight and leadership in the ED's absence.

In the first four years, the Sabbatical Program has awarded 15 sabbatical grants to nonprofit organizations in San Diego and Orange Counties. An application process is used to select the participants, and each organization receives the equivalent of a $50,000 grant to:

- Support a 3-month paid leave for the ED

- Offer professional development funds to support the leadership development and skill-building of staff and internal interim leaders

- Provide access to an experienced nonprofit consultant who is available to support the ED, staff, interim leaders, and board throughout the sabbatical period

- Financially reward key staff who demonstrate exemplary leadership in the ED's absence
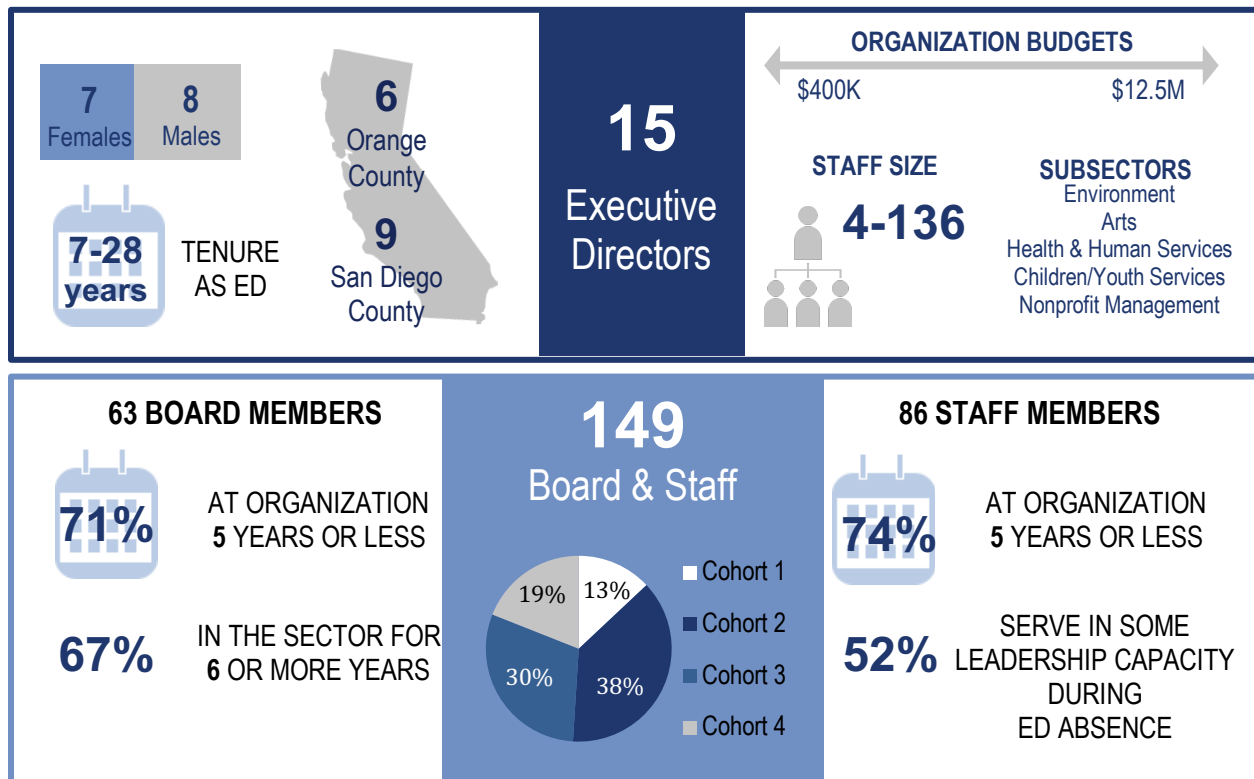
PROGRAM OBJECTIVES

The Fieldstone Leadership Network's objectives for the Sabbatical Program are aligned with its three organizational priority areas, which are summarized below:

1) Strengthen nonprofit leaders by providing EDs with a paid, extended opportunity for rest, reflection and renewal

2) Enhance the capacity of nonprofit organizations through increased investments in human resources, greater leadership opportunities, and collaboration between staff and board

3) Ultimately strengthen the nonprofit sector through cross-sector dialogue and collaboration among nonprofit leaders

Strengthen Non-Profit Leaders

Increase Non-Profit Organizational Capacity

Sustain a Vibrant Network

PARTICIPANT PROFILE

Below is a summary profile of the 15 nonprofit organizations and 149 board and staff who participated in the Sabbatical Program.

7 Females **8** Males

6 Orange County

9 San Diego County

15 Executive Directors

ORGANIZATION BUDGETS
$400K — $12.5M

STAFF SIZE **4-136**

SUBSECTORS
Environment
Arts
Health & Human Services
Children/Youth Services
Nonprofit Management

7-28 years TENURE AS ED

63 BOARD MEMBERS

71% AT ORGANIZATION 5 YEARS OR LESS

67% IN THE SECTOR FOR 6 OR MORE YEARS

149 Board & Staff

- 13% Cohort 1
- 38% Cohort 2
- 30% Cohort 3
- 19% Cohort 4

86 STAFF MEMBERS

74% AT ORGANIZATION 5 YEARS OR LESS

52% SERVE IN SOME LEADERSHIP CAPACITY DURING ED ABSENCE

FINDINGS

The findings suggest that sabbaticals, when implemented with both the ED and the organization in mind, can serve as a catalyst for capacity building that can ultimately fortify and sustain nonprofit organizations. Four years of data demonstrate that the Sabbatical Program strengthens nonprofit leaders, builds organizational capacity, and contributes to a vibrant nonprofit sector.

1. Strengthening Nonprofit Leaders: Executive Directors and Interim Leaders

Executive Director

After completely disconnecting from their organizations for three months, EDs had the most immediate gains, as evidenced by the leaders themselves and observed by board, staff and consultant. In particular, after returning from the sabbatical, EDs reported improvements in their well-being and systems thinking.

Figure 1. EDs' well-being improved after the sabbatical
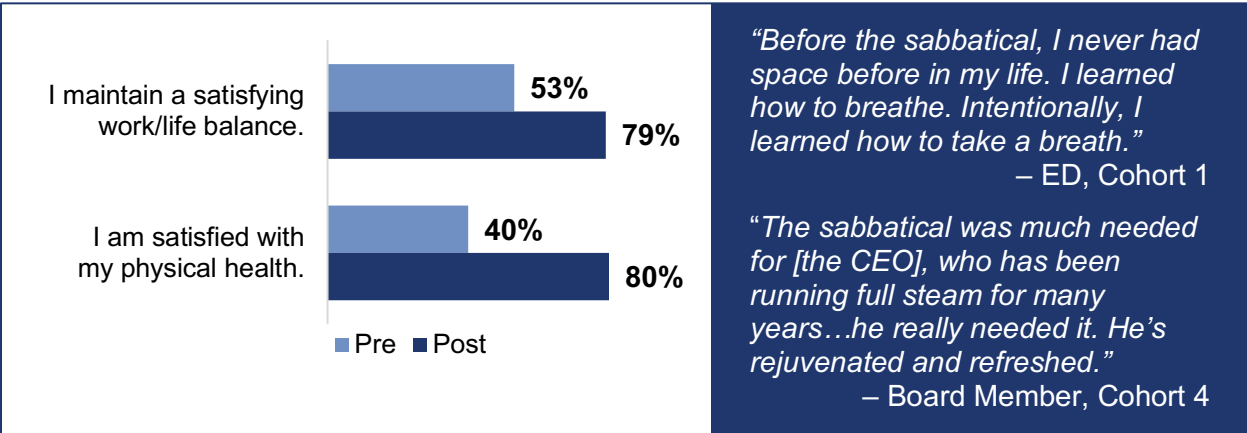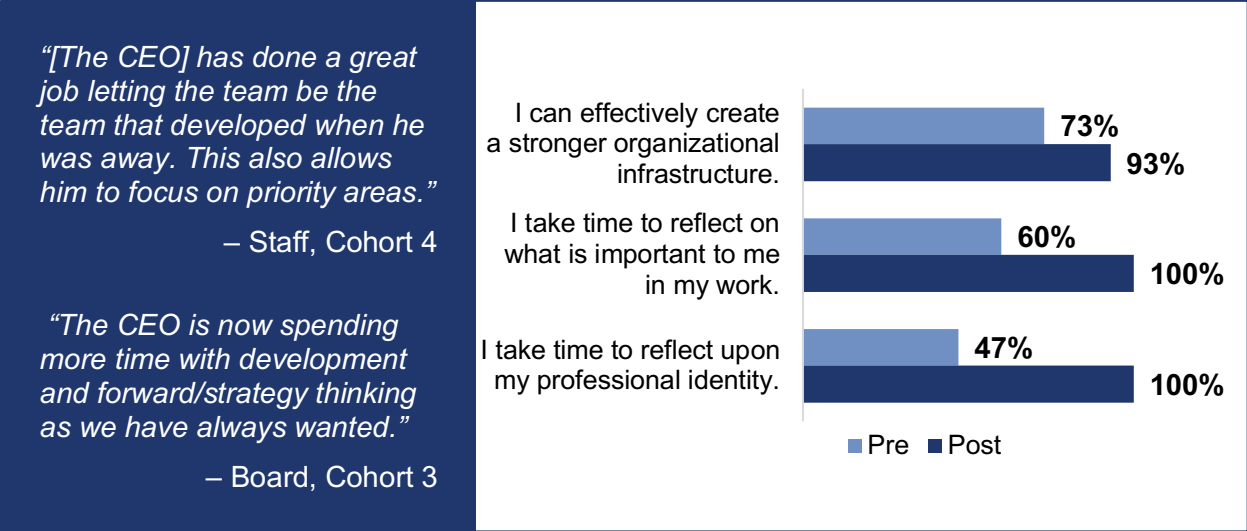*(n=15; Percent of EDs who "Agree" or "Strongly Agree")*

I maintain a satisfying work/life balance.
- Pre: 53%
- Post: 79%

I am satisfied with my physical health.
- Pre: 40%
- Post: 80%

"Before the sabbatical, I never had space before in my life. I learned how to breathe. Intentionally, I learned how to take a breath."
– ED, Cohort 1

"The sabbatical was much needed for [the CEO], who has been running full steam for many years…he really needed it. He's rejuvenated and refreshed."
– Board Member, Cohort 4

Figure 2. EDs became more reflective and strategic after the sabbatical
(n=15, Percent of EDs who "Agree" or "Strongly Agree")

"[The CEO] has done a great job letting the team be the team that developed when he was away. This also allows him to focus on priority areas."
– Staff, Cohort 4

"The CEO is now spending more time with development and forward/strategy thinking as we have always wanted."
– Board, Cohort 3

I can effectively create a stronger organizational infrastructure.
- Pre: 73%
- Post: 93%

I take time to reflect on what is important to me in my work.
- Pre: 60%
- Post: 100%

I take time to reflect upon my professional identity.
- Pre: 47%
- Post: 100%

Interim Leadership

Interim leaders also reported gains as a result of acting as the temporary leader of the organization. They emphasized that serving as interim leader was a valuable professional development opportunity that resulted in improved skills and growth in their ability to delegate, solve problems, and make decisions on behalf of the organization.

"The sabbatical enabled all to see how well the [interim leader] stepped up for the organization."

– Board Member, Cohort 4

61% of individuals serving in a leadership capacity in the executive director's absence reported they felt more effective and had more leadership opportunities after the sabbatical*

Specifically, individuals reported building their leadership capacity in three fundamental ways while serving as interim leader:

SKILL BUILDING

"I learned it's not enough to implement new structures without built-in systems to measure success and ensure accountability."

– Interim Leader, Cohort 4

"I think, as tangible as you can make it, my communication skills grew [as did my] presentation skills and being seen with the community. Also, [I was] able to manage and maneuver challenging conversations internally and externally."

– Interim Leader, Cohort 3

COMMUNICATION & RELATIONSHIP DEVELOPMENT

"I was able to successfully navigate a pivot in one of our funding opportunities by working with the team and board of directors."

– Interim Leader, Cohort 4

"I had a sit-down with [the performers] and talked to them about their experience without [the executive director] at the table, very candidly… I learned so much… having that one conversation was invaluable, and as a result, we operate differently."

– Interim Leader, Cohort 3

"I was given the opportunity to work more closely with the board, which gave me insight on how they worked and how to work with them. I also oversaw a consultant with the help of a board member, which taught me how to manage someone."

– Interim Leader, Cohort 1

AWARENESS OF SELF & OTHERS

"When [the ED] leaves, you learn about yourself. For better or for worse, your strengths and weaknesses are illuminated much more clearly when you are by yourself."

– Interim Leader, Cohort 3

"I learned to leverage the skill sets and talents of staff to their optimum, allowing for team members to grow and take on responsibilities they may not have before."

– Interim Leader, Cohort 4

2. Building Organizational Capacity Through the Development of Boards and Staff

The Sabbatical Program also benefitted the organization. In the absence of the ED, staff and board members were stretched to take on more responsibility and work together in order to maintain and/or advance the mission of the organization. According to board and staff, organizational capacity was built during the sabbatical through improved board and staff skills, increased social connectivity, and the implementation of structural changes within the organization.

Figure 3. Staff and board reported they developed skills as a result of the sabbatical
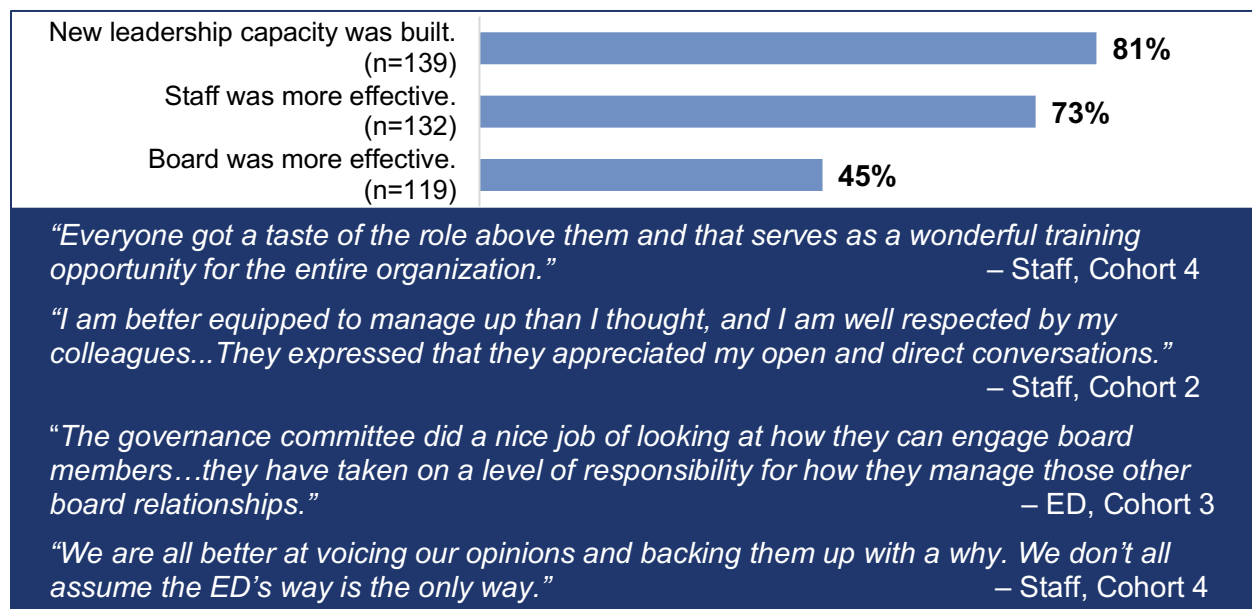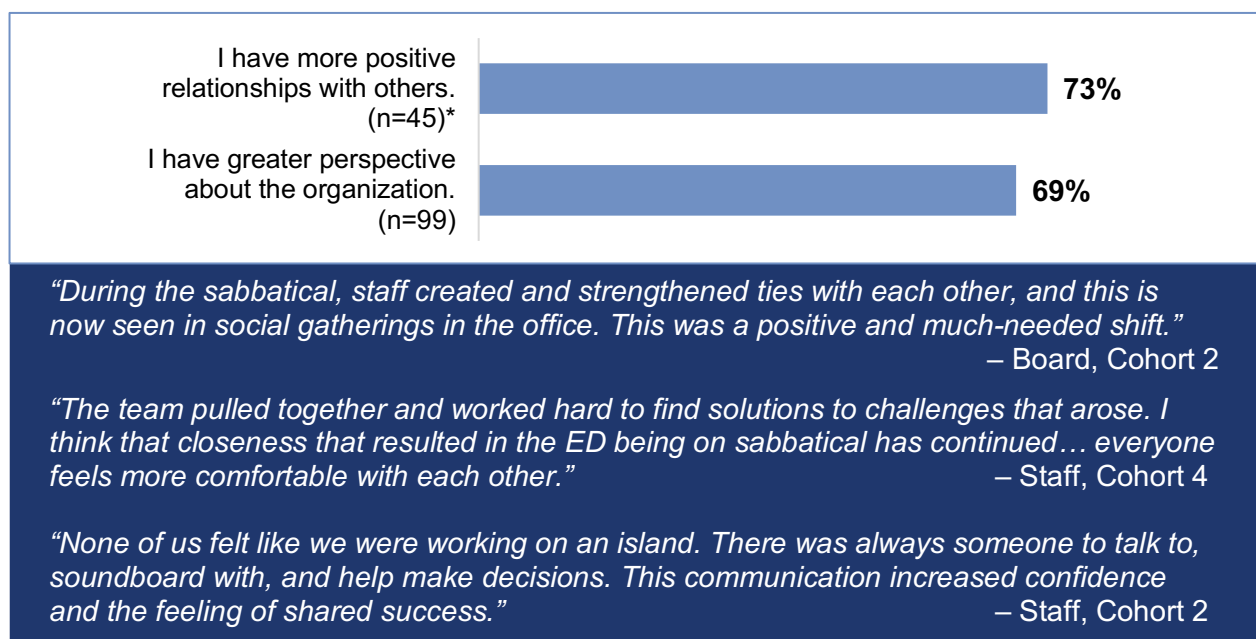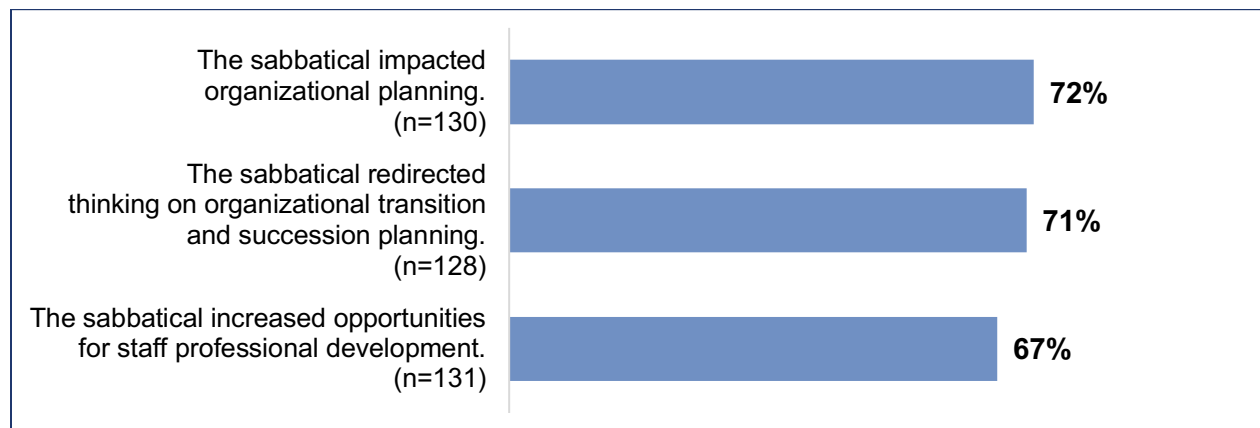*(Percent of Board and Staff who "Agree" or "Strongly Agree")*

New leadership capacity was built. (n=139)	81%
Staff was more effective. (n=132)	73%
Board was more effective. (n=119)	45%

"Everyone got a taste of the role above them and that serves as a wonderful training opportunity for the entire organization." – Staff, Cohort 4

"I am better equipped to manage up than I thought, and I am well respected by my colleagues...They expressed that they appreciated my open and direct conversations." – Staff, Cohort 2

"The governance committee did a nice job of looking at how they can engage board members…they have taken on a level of responsibility for how they manage those other board relationships." – ED, Cohort 3

"We are all better at voicing our opinions and backing them up with a why. We don't all assume the ED's way is the only way." – Staff, Cohort 4

Figure 4. Social connectivity increased after the sabbatical
(Percent of Board and Staff who "Agree" or "Strongly Agree")

I have more positive relationships with others. (n=45)*	73%
I have greater perspective about the organization. (n=99)	69%

"During the sabbatical, staff created and strengthened ties with each other, and this is now seen in social gatherings in the office. This was a positive and much-needed shift." – Board, Cohort 2

"The team pulled together and worked hard to find solutions to challenges that arose. I think that closeness that resulted in the ED being on sabbatical has continued… everyone feels more comfortable with each other." – Staff, Cohort 4

"None of us felt like we were working on an island. There was always someone to talk to, soundboard with, and help make decisions. This communication increased confidence and the feeling of shared success." – Staff, Cohort 2

*Question was only asked to Cohort 3.

Figure 5. Structural changes were implemented within organizations after the sabbatical
(Percent of Board and Staff who "Agree" or "Strongly Agree")

The sabbatical impacted organizational planning. (n=130) — **72%**

The sabbatical redirected thinking on organizational transition and succession planning. (n=128) — **71%**

The sabbatical increased opportunities for staff professional development. (n=131) — **67%**

"It did cause us to think about our succession planning and what skill gaps still need to be addressed in a potential successor to the CEO."
– Board, Cohort 3

"The sabbatical added clarity and confirmed some roles on the executive team, which allow for clearer roles and responsibilities that are now articulated on the org chart and job descriptions."
– Staff, Cohort 4

"I am not concerned about succession planning anymore. The sabbatical showed us how solid we are. We are in a good spot. I could walk out tomorrow and they would be fine. We have enough things that are strengths...and I know the [interim leader] is the person for the role."
– ED, Cohort 4

"[The sabbatical] helped on adaptability and preparation for our planning, and it helped with the transition that may take place…The board has a clear sense of the [interim leader]."
– ED, Cohort 3

"The staff development fund is great and many staff are now taking advantage of becoming more educated."
– Staff, Cohort 4

"I have been back a couple months. Now, the senior leadership is taking mini-sabbaticals so they can experience the feeling of disconnecting."
– ED, Cohort 4

71% of nonprofit board and staff respondents from all 15 organizations indicated that the sabbatical redirected thinking on organizational transition and succession planning.

On a national level, only 40% of nonprofit organizations report having a succession plan to replace senior leadership, which is an essential component of sustainability planning[1]

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[1] *Nonprofit Employment Practices Survey, 2017:* https://www.nonprofithr.com/2017-nep-survey-new/

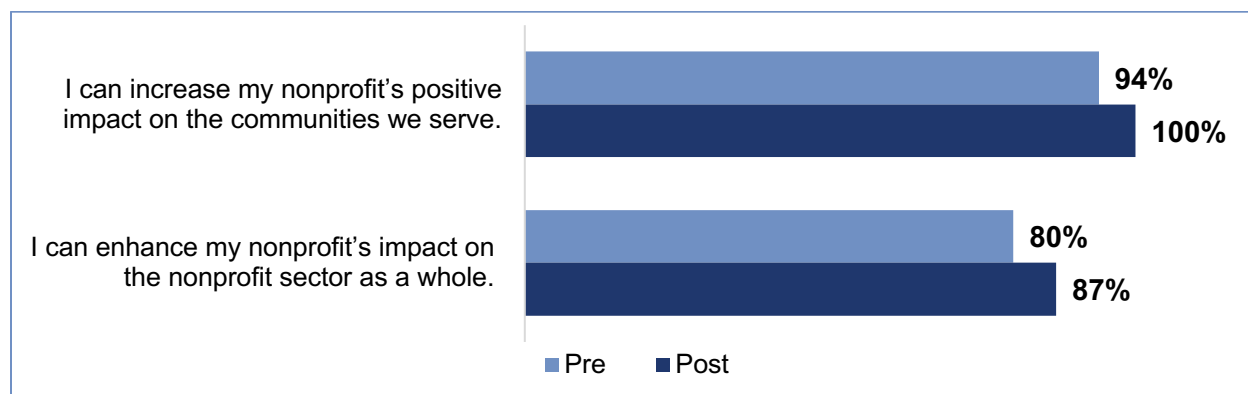# 3. Contributes to a Vibrant Nonprofit Sector

The benefits from the sabbatical have the potential to extend beyond the individual and the organization, and support the sector as a whole. Staff reported gaining skills and knowledge during the sabbatical that they will use in the future, which bolsters the nonprofit sector whether they stay in their existing nonprofit job, or move to another nonprofit job. EDs reported an increased ability to make a positive impact beyond their organizations. Also, according to board, staff and the ED, the sabbatical raised awareness about the importance of leadership, professional development and sabbaticals in the nonprofit sector.

> **64%**
> *(n=45*)*
>
> I gained new skills and knowledge that will serve me in the future as a result of the sabbatical.
> *(staff respondents who "Agree" or "Strongly Agree")*
>
> **Question was only asked to Cohort 3 & 4*

Figure 6. ED's reported an increased ability to make a positive impact
(n=15; Percent of EDs who "Agree" or "Strongly Agree")

I can increase my nonprofit's positive impact on the communities we serve.	94% (Pre) / 100% (Post)
I can enhance my nonprofit's impact on the nonprofit sector as a whole.	80% (Pre) / 87% (Post)

Legend: ■ Pre ■ Post

Awareness about the positive impact of the sabbatical grew

"I have been a Corporate America executive for 30 years; it was very stressful. I always thought about taking a sabbatical yet never did due to concerns about missing too much work time and potential loss of stature. However, I made a huge mistake by not leveraging a sabbatical. As a result of this program, I learned how important the sabbatical is to the individual, as well as his/her family, and ultimately the organization. More sabbaticals are needed."
— Board, Cohort 4

"The organization appreciates the support we received and will recommend that the sabbatical become a regularly planned function of selected personnel who require a break from the daily operations…as part of an ongoing 3 to 5 year strategy."   — Board, Cohort 3

 "The Sabbatical Program communicates that the nonprofit sector is a serious sector and it's important that leaders charge their batteries."
— Consultant

"Sitting on a statewide council that supports [the nonprofit subsector], my taking of a sabbatical has helped increase awareness within the [sector specific] community about the importance of taking a break and how it helps recharge creative energies."   — ED, Cohort 2

"More organizations need to enable and promote sabbaticals because they are priceless to all elements if managed well."
— Board, Cohort 4

CONSIDERATIONS FOR THE FUTURE

Although the Sabbatical Program had a positive impact on all 15 participating organizations, the staff, board, and EDs also confronted challenges during and after the sabbatical. In Year 2, based on feedback from participants, the NPI research team identified four factors to be taken into consideration in order to maximize the benefits of the sabbatical (see Table below). Note that the Sabbatical Program is committed to continuous process improvement and generative thinking, while still being flexible in adapting to individual and organizational differences. To this end, the Fieldstone Leadership Network has actively made changes to the Sabbatical Program design every year in an effort to better address these challenges. Some of these modifications included changing the award process to be more inclusive of the entire organization, involving interim leaders in its orientation, and requiring greater involvement from board chairs. Because these challenges are complex and each participating organization is unique, these areas continue to need attention, although it should be noted that there was far less critical feedback about these challenges from staff, board and EDs in Year 4 than in previous years.

Considerations to ensure a successful sabbatical

Involve board, staff and the departing leader in planning before, during and after the sabbatical.	*"The board must play a greater role in [planning]…understanding where its own opportunities for growth and reflection will come from as a result of the sabbatical."* — Board, Cohort 1 *"There was not enough input from the ED regarding what he would do with the three months. There was an assumption he was a free agent…with my academic background this felt too short and left experience to chance."* — Board, Cohort 4
Consider the readiness of both the organization and leader to participate in this program.	*"An organizational readiness standard should be set for sabbaticals and the timing and preparation of the sabbatical should be in synch with a high readiness evaluation."* — Staff, Cohort 2
Treat the re-entry process with sensitivity, understanding that both the ED and the team left in charge have likely gone through many shifts.	*"The ED may have needed additional support for re-entry than what was used...It was more difficult to get back into the swing of things than I had anticipated, and the ED required a lot of assistance from me to determine role, tasks, etc."* — Staff, Cohort 2 *"It was difficult for me to transition back to my job…there should be more support provided for the individuals who acted in the CEO's absence to help with the transition back into their original roles."* — Staff, Cohort 3
Engage in ongoing dialogue with board, staff and ED about sustaining sabbatical gains for both the ED and organization.	*We have reverted back to old patterns around communication and expectations but are also working long-term to better align accountability with talent…consider a longer [sabbatical] period to allow staff time to implement change management processes. Three months was too short to really initiate change."* — Staff, Cohort 4 *"The challenge is how to sustain the benefits of the sabbatical. Right now… I'm back at a traffic light, and it's red, and I know I got 30 seconds, I'm checking mail."* — ED, Cohort 3

LONG-TERM IMPACTS

Four years of data across 15 organizations support previous research[2] on nonprofit sabbatical programs and suggest that sabbaticals, when implemented thoughtfully and with both the ED and the organization in mind, can strengthen leaders and build the capacity of organizations.

As a result of the sabbatical program, EDs and interim leaders improved well-being and increased systems thinking. Staff learned new skills, boards became more involved, shared leadership increased, and in some cases, structural changes were made to the organization, including new roles, processes, and policies.

More time needs to pass to know the full extent of the impact of the Sabbatical Program on the leaders and organizations that have participated. However, in a 2017 focus group with EDs 9-24 months after their sabbatical, they reported long-term impact on themselves and their organizations. This is affirming because it validates the use of nonprofit sabbaticals as both a leadership development and capacity building tool that has lasting effects.

EDs reported long-term benefits for themselves as a result of the sabbatical
(n=7; EDs from Cohorts 1 & 2)

INDIVIDUAL: Long-Term Impacts	
- Less stress - Clarity about role - Greater self-awareness - Increased creativity and curiosity - Reflection about retirement - Increased connection to peers	*"I have less physical manifestations of stress."* *"My pace has adjusted. I used to think everything had to be done in that second. There is a calmness in spacing things out."* *"The sabbatical brought me more clarity…and brought me closer to my higher self…I can hear better; my ears are bigger."* *"I have a greater sense of curiosity."* *"There has been a creativity explosion."* *"I have continued to have a greater trust that others can lead. I am less controlling."* *"The benefits of the sabbatical have been immeasurable professionally and personally."* *"As a founder, I didn't believe I could ever actually leave. The sabbatical was a good exercise in trusting staff and empowering them…It empowered me to think about my retirement."* *"I see [other sabbatical recipients] in the community. I wasn't connected to them before the program."*

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[2] Linnell, D.S. & Wolfred, T. (2009). *Creative disruption – Sabbaticals for capacity building & leadership development in the nonprofit sector.* San Francisco, CA. Compass Point Nonprofit Services & Third Sector, New England.

EDs reported long-term benefits for their organizations as a result of the sabbatical
(n=7; EDs from Cohorts 1 & 2)

Organization: Long-Term Benefits	
- Culture of well-being - Succession planning discussed and enacted - Decreased focus on ED/Increased focus on staff - Greater shared leadership - Stronger bond between board and staff - More autonomous and connected staff	*"We are more open, less focused on just the organization. We are also focused on employees and leaders."* *"We are going through a transition organizationally and I'm not sure we would have gone through it without the sabbatical…we have an expanded mission, [and] alternative sources of income."* *"A lot of responsibilities are now taken on by [other staff]. We have well-defined roles."* *"My role is perceived as less important. When I take two weeks of vacation, it's fine."* *"I used the succession plan from the sabbatical as a framework for staff departures.* *"There is a better bond between the staff, a much stronger feeling of camaraderie and confidence."* *"There is a stronger bond between the board appreciating the talents and leadership of the next level staff. There is no meddling and more admiration."*

The Sabbatical Program is a tool for change, which is often difficult for individuals and organizations. Like any change-making initiative, the Sabbatical Program is a disruption to each organization, as much as it is a tool for significant growth. In evaluating the impact of the Sabbatical Program, it is crucial to acknowledge challenges and tensions as they emerge because they improve our understanding about the planning, processes and impact of nonprofit sabbaticals.

Findings from three years of data also indicate that the Sabbatical Program has begun to raise awareness about the inextricable links between the well-being of nonprofit leaders, the capacity of nonprofit organizations, and the health of the nonprofit sector. As the nonprofit and philanthropic sector is increasingly called upon to lead the charge in addressing social problems, findings from this evaluation support the case that increasing awareness of, and investments in, sabbatical programs is not only good for leaders and their organizations, but for the sector as well.

> **"Overall I think the sabbatical served different goals, some of which were not even intended. I feel it was good for our organization and for our ED, and its impacts reached into all levels of the organization."**
>
> **– Staff, Cohort 3**

APPENDIX A: METHODOLOGY

The findings presented in this report are based on multiple data sources. The NPI research team designed and collected Cohort 1, 2, 3 and 4 data from all 15 organizations between December 2014 and November 2018.

Data Type	Description
ED Pre- and Post-Sabbatical Survey n=15	Online survey administered to EDs 2-4 weeks prior to their departure and 8-10 weeks after their return. All 15 EDs completed both surveys.
ED Pre- and Post-Sabbatical Interview n=15	90 minute in-person interview with EDs 2-4 weeks prior to their departure and 8-10 weeks after their return. All 15 EDs participated in both interviews.
Interim Leader Post-Sabbatical Interview n=2	60-minute in-person interview with individuals serving in interim leader role at least 3 months after the return of the ED.
Staff and Board Post-Sabbatical Survey n=63 (board) n=86 (staff)	Online survey administered to staff and board 8-10 weeks following the sabbatical return. Out of the 205 board and staff who were asked to participate, 149 (73%) completed the survey.
Consultant Interview n=1	Three 90-minute in-person interview with consultant 8-10 weeks after the last ED from each Cohort returned from sabbatical.
ED Focus Group n=7	60-minute in-person focus group with EDs from Cohort 1 and Cohort 2, whose organizations participated in the sabbatical program approximately 9 -24 months earlier.

Methods of Analysis

Board and staff survey results were analyzed by organization and position in the organization (i.e., staff, board, or interim leader) and all findings are reported in aggregate. Interviews and open-ended survey questions were analyzed using content analysis, a method for identifying the themes in responses. The qualitative and quantitative data are synthesized to paint a picture of how the Sabbatical Program collectively impacted the 15 organizations. Note that the report does not include all survey results. The results for all survey questions are included in Appendices C and D. Based on findings from the Year 1 and Year 2 evaluations, some evaluation changes were instituted the following year, including:

- **Year 2:** A logic model, designed to refine the goals of the Sabbatical Program, was developed in collaboration with the Fieldstone Leadership Network (See Appendices B and C).
- **Year 2 and 3:** The number of staff and board survey participants was increased from previous years in order to gather a broader perspective on the ways in which the Sabbatical Program impacted each organization.
- **Year 2 and 3:** Interview and survey questions were revised to gather additional feedback from EDs, staff, and the board.
- **Year 4:** No revisions were made to interview or survey questions.

Logic Model for Fieldstone Foundation's

Clare Rose Sabbatical Program

Inputs		
Fieldstone Leadership Network	Clare Rose Foundation	Nonprofit Orgs/Executive Directors (EDs) eligible for Sabbatical

Participants	Activities	Outputs	Outcomes	Network Goals
Nonprofit orgs in San Diego and Orange Counties Executive Directors (EDs) Staff Board members Fieldstone Leadership Network Other nonprofit leaders	Sabbatical recruitment – Application – Professional Development Fund Proposal – Site visit(s)/notification Pre-sabbatical orientation Paid Sabbatical for EDs – $40,000 salary and travel – 480-600 hours uninterrupted time off $5,000 staff professional development (PD) fund $2,500 to recognize staff leadership and increased capacity during the sabbatical 12 hours consultant services USD Study participation Sabbatical Alumni events Courage Retreat Marketing of Sabbatical Program	Number of orgs who apply for sabbatical Number of EDs who go on sabbatical Amount of annual contribution to professional development (PD) fund after Year 1 Amount of recognition award per staff Number of hours consultant is used per organization Number of EDs who attend alumni events Number of EDs who attend Courage Retreats Number of communications about sabbatical program How long EDs remain at organization after the sabbatical	**STRENGTHEN NONPROFIT LEADERS** Increased well-being – Renewal, physical/emotional/mental health, work/life balance, positive relationships Increased systems thinking – Shared leadership, focus on big picture, complex problem solving **INCREASE NONPROFIT ORGANIZATIONAL CAPACITY** Increased human capital – Staff and board skill development, decision-making, broader understanding of organization Increased social capital – Shared leadership, communication and collaboration between staff, board and executive director, staff commitment to the organization Increased structural capital – Organization restructure, process/policy changes, changes or establishment of professional development fund **SUSTAIN VIBRANT NETWORK** Increased awareness about the sabbatical program as a leadership development strategy – External communications about the sabbatical program, participation by sabbatical orgs in other Fieldstone programs Increased connections between sabbatical recipient organizations – Dialogue or joint projects between sabbatical recipient EDs, staff or board Increased sustainability and stability of the sector – Intention to stay in sector, pride in sector	*Strengthen the nonprofit community by providing a continuum of programs that:* **Strengthen Nonprofit Leaders** - Systemic thinking - Interdisciplinary learning - Problem solving **Increase Organizational Capacity** - Collaboration - Board Governance - Staff Management **Sustain a Collective Vibrant Network** -Multi-generational -Cross sector -Reciprocal

See Appendix C for definition of terms

APPENDIX C: LOGIC MODEL TERM DEFINITIONS

STRENGTHEN NONPROFIT LEADERS

Increased well-being: Renewal, physical/emotional/mental health, self-confidence as a leader, commitment to organization, reflection on personal/professional identity, work/life balance perception and behavior, positive relationships.

Increased systems thinking: Shared leadership, focus on macro (big picture) more than micro, complex problem solving, strategic decision-making, embracing complexity, valuing knowledge and expertise of others, ongoing learning.

INCREASE NONPROFIT ORGANIZATIONAL CAPACITY

Increased human capital: Staff and board skills, knowledge, experience, and confidence in terms of value to organization (e.g., increased autonomy, decision-making, innovation, leadership, broader understanding of organization).

Increased social capital: Degree to which trustworthiness, understanding, connections and a sense of membership exists among organizational constituents, which can be used to achieve organizational goals (e.g., shared leadership, communication and collaboration between staff, board and executive director, engagement with and commitment to the organization).

Increased structural capital: Mechanisms and structures of the organization that enable the organization to function in a repeatable, scalable way. Owned by the organization and remains with the organization even when people leave and can be reused without diminishing in value. For example: continuous process improvement, organizational memory, changes to organization structure, time off policies, sabbatical policies, establishment of or changes to professional development fund.

SUSTAIN A VIBRANT NETWORK

Increased awareness about the purpose and impact of the Sabbatical Program as a leadership development strategy of the sector: Communication about the Sabbatical Program within sabbatical organizations, Fieldstone community, and other associated organizations (e.g., board members sharing experience with colleagues on other nonprofit boards), publications/communications about the Sabbatical Program and its impacts that are not sponsored by participating sabbatical organizations or Fieldstone Leadership Network (e.g., Performances Magazine), conference or academic presentations about the Sabbatical Program, participation by sabbatical recipient organizations (ED, staff, and boards) in all Fieldstone programs.

Increased connections between sabbatical recipient organizations: Dialogue or joint projects between sabbatical recipient EDs, staff, or board, perception of value of having and learning from a trusted network of Sabbatical colleagues.

Increased sustainability and stability of the nonprofit sector: Intention to stay in sector, pride in sector, next position (only applicable if they leave current organization).

APPENDIX D: PRE AND POST ED SURVEY RESULTS

Please rate the extent to which you agree with the following statements, using the scale provided below.

Strongly Disagree (1)	Disagree (2)	Neither Agree nor Disagree (3)	Agree (4)	Strongly Agree (5)

Percentage who "Agree" or "Strongly Agree" with statement

	ALL PRE n=15	ALL POST n=15
Confidence		
I have confidence in my leadership abilities.	100%	100%
I have confidence in the leadership capacity of my board of directors.	67%	67%
I have confidence in the leadership capacity of my staff.	87%	87%
Effectiveness		
I work effectively with our board of directors.	93%	100%
I work effectively with our staff.	93%	87%
I can effectively lead capacity building in my organization.	74%	73%
I can effectively create a stronger organizational infrastructure in my organization.	73%	93%
I can effectively increase my nonprofit's ability to have a positive impact in the communities we serve.	93%	100%
I can effectively enhance my nonprofit's impact on the nonprofit sector as a whole.	80%	87%
Reflection and Commitment		
I take time to reflect upon my professional identity.	47%	100%
I take time to reflect upon what is important to me in my work.	60%	100%
I hope to work in the nonprofit sector for the balance of my career.	87%	80%
I am proud to be a nonprofit professional.	100%	100%
I am committed to my organization.	100%	100%
I am committed to the nonprofit sector.	93%	93%

	ALL PRE n=15	ALL POST n=15
Well-Being		
I am satisfied with my physical health and well-being.	40%	80%
I am satisfied with my mental health and well-being.	67%	93%
I maintain a satisfying work/life balance.[3]	53%	79%
I feel energetic about my job.	80%	100%
Post-Sabbatical Expectations **(Wording reflects pre-sabbatical survey;** **post-sabbatical survey used past tense)**		
I anticipate that my sabbatical will give me more energy to do my job.	93%	93%
I anticipate that my sabbatical will recharge me.	100%	100%
I anticipate that my sabbatical will enhance my leadership capacity.	87%	100%
I anticipate that my sabbatical will enhance my staff's leadership capacity.	100%	87%
I anticipate that my sabbatical will enhance my board of director's leadership capacity.	93%	73%

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[3] *One ED in Year 2 did not answer this question in the post survey (n=14).*

APPENDIX E: STAFF AND BOARD SURVEY RESULTS[4]

Strongly Disagree (1)	Disagree (2)	Neither Agree nor Disagree (3)	Agree (4)	Strongly Agree (5)

Percentage of Respondents who "Agree" or "Strongly Agree" with the following statements using the scale below (*if no footnote, asked all three years*)

	Overall
I worked more as part of a team during the sabbatical.[5] (staff only, n=45)	82%
I had greater influence on decisions during the sabbatical.[5] (staff only, n=45)	80%
I had more positive relationships with others in the organization during the sabbatical.[5] (staff only, n=45)	62%
The ED appeared to be more rested and rejuvenated post-sabbatical. (board/staff, n=138)	90%
The ED demonstrates a better work/life balance post-sabbatical. (board/staff, n=129)	64%
The ED demonstrates more confidence in the job post-sabbatical. (board/staff, n=136)	58%
The Executive Director delegates more responsibilities post sabbatical.[5] (board/staff, n=65)	72%
The Executive Director focuses more on the big picture post sabbatical.[5] (board/staff, n=68)	66%
The board of directors of the organization is more effective post-sabbatical. (board/staff, n=119)	45%
Staff members of the organization are more effective post-sabbatical. (board/staff, n=132)	73%
My role/job has been substantially restructured as a result of the sabbatical.[6] (staff only, n=43)	16%
My role has changed post-sabbatical.[5] (staff only, n=45)	53%
I have greater decision-making authority post-sabbatical.[6] (staff only, n=86)	38%
I have more leadership opportunities post-sabbatical.[7] (staff only, n=69)	57%
I am more effective in my organizational role post-sabbatical. (staff only, n=85)	59%
I have more productive relationships with others in my organization as a result of the sabbatical.[7] (staff only, n=41)	59%

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[4] *The survey was revised in Year 2 and 3 to include additional questions for board and staff. The survey administration was also expanded to include more staff from each organization.*

[5] *Asked in Year 3 and 4; not asked in Year 1 and Year 2.*

[6] *Asked in Year 1 and Year 2; not asked in Year 3 or 4.*

I have more positive relationships with others in the organization post-sabbatical.[5] (staff only, n=45)	73%
I plan to stay in my job longer than I had previously projected as a result of the sabbatical.[6] (staff only, n=38)	16%
I feel more committed to the organization post-sabbatical.[5] (staff only, n=44)	61%
I gained new skills and knowledge that will serve me in the future as a result of the sabbatical.[5] (staff only, n=45)	64%
I have a greater role in fundraising post-sabbatical.[7] (board only, n=54)	15%
I am working more closely with the staff post-sabbatical.[7] (board only, n=54)	39%
I am more prepared to engage in planning for the future post-sabbatical (succession planning, strategic planning, etc).[7] (board only, n=54)	56%
I am more a more effective board member post-sabbatical.[7] (board only, n=54)	50%
I have a greater perspective about the organization post-sabbatical. (board/staff, n=99)	69%
Lessons from the sabbatical impacted organizational planning. (board/staff, n=130)	72%
The sabbatical redirected thinking on organizational transition and succession planning. (board/staff, n=128)	71%
There are more opportunities for staff professional development as a result of the sabbatical. (board/staff, n=131)	67%
New leadership capacity was built within the organization as a result of the sabbatical. (board/staff, n=139)	81%
The application process was a useful way to prepare the organization for the sabbatical. (board/staff, n=90)	58%
The length of the sabbatical was appropriate. (board/staff, n=137)	81%
The sabbatical financial support was sufficient. (board/staff, n=92)	72%
The consulting support for the organization in the executive director's absence was appropriate. (board/staff, n=90)	66%
The process established for the ED to re-enter the organization after the sabbatical was appropriate. (board/staff, n=118)	78%

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[7] *Asked in Year 2, 3 and 4; not asked in Year 1.*