



The Nonprofit Sabbatical as a Catalyst for Capacity Building:

A 5-Year Evaluation
Summary of the Fieldstone
Leadership Network San
Diego's Clare Rose
Sabbatical Program

September 2020



Study funded by: The Clare Rose Foundation



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.



About the Fieldstone Leadership Network San Diego

The mission of the Fieldstone Leadership Network San Diego 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.



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.

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EXECUTIVE SUMMARY

Five years of data support previous research on nonprofit sabbatical programs and suggest that sabbaticals, when implemented thoughtfully and with both the ED and the organization in mind, can serve as a catalyst for capacity building that can ultimately strengthen and sustain nonprofit organizations. Based on the evaluation of the Sabbatical Program, data show:

- **EDs demonstrated personal and professional gains.** As evidenced by the leaders themselves and observed by board, Interim leaders, and staff, EDs experienced increased well-being and renewed energy to be more strategic and focus on the vision and future growth of their organization.
- **Interim leaders and other staff build their leadership capacity.** Interim leaders had planned and unplanned experiences that stretched them and required them to think and act differently than prior to the sabbatical. As a result, they increased their understanding about the organization and their own leadership approach. They built functional skills and learned how to lead others. Other staff also learned new skills and took on new responsibilities, sharing leadership.
- **Boards built their capacity as well.** Boards deepened their relationships with staff, increased collaboration, and developed a broader understanding of the organization and the ED role.
- **Organizations were more strategic about investing in talent and more prepared for executive transitions.** Following the sabbatical, organizations made changes to existing structures and created new policies with the intention to communicate value to employees. Additionally, because organizations experienced a dry-run with the absence of EDs for 3-months, they were more equipped to handle the expected or unexpected departure of an ED.
- **Networks between nonprofit sabbatical recipients increased.** EDs and Interim leaders reported deepening existing and creating new relationships as a result of the sabbatical, some of which have led to confidants and even collaborations.
- **Awareness about nonprofit sabbaticals increased.** Formal and informal opportunities to share personal stories about sabbatical experiences and sabbatical impact have contributed to the growing interest and awareness of nonprofit sabbaticals.

In sum, the strength and long-term sustainability of a nonprofit organization is dependent not only on the well-being and commitment of its ED, but also on the leadership of its board and staff. The results of the Fieldstone Leadership Network San Diego's Clare Rose Sabbatical Program demonstrate that gains were made by EDs, staff and board, ultimately strengthening all 19 organizations. As a result, the Southern California nonprofit sector is stronger as well.

Nonprofit Sabbaticals

Benefit Leaders, Organizations and the Nonprofit Sector

Evaluation results from 19 organizations over 5 years indicate that the Sabbatical Program contributed to improvements in the well-being of nonprofit leaders, the capacity of nonprofit organizations, and the health of the nonprofit sector.

Executive Directors



91%

Board and staff reported the **ED was more rested and rejuvenated** post-sabbatical

Strengthen Nonprofit Leaders

Interim Leaders

83%

Interim leaders reported gaining **skills and knowledge for the future**



80%

Board and staff reported **new leadership capacity was built in the organization**

Increase Nonprofit Capacity

100%

Organizations **created a temporary succession plan**



Awareness about nonprofit sabbaticals and the importance of investing in leaders increased



Sustain a Vibrant Network

Relationships grew between nonprofit leaders and **their networks deepened**



OVERVIEW AND BACKGROUND

"It seemed like an impossible task at the beginning, but everyone survived and even THRIVED.

Best of all, the ED is so refreshed, energized, and replenished."

— Board, Year 5

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 San Diego and the Clare Rose Foundation partnered to launch the Fieldstone Leadership Network San Diego's Clare Rose Sabbatical Program (subsequently referred to as the Sabbatical Program). The Sabbatical Program is designed to support the well-being of EDs by providing them with an opportunity to temporarily disconnect from their organizations while simultaneously building organizational capacity and elevating leadership of staff and board in the ED's absence.

Shortly after the Sabbatical Program began in 2014, The Nonprofit Institute (NPI) 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 all 5-years (2014-2019). Between November 2014 and November 2019, the NPI evaluation team conducted interviews and surveys with Executive Directors (EDs), staff, and boards from all 19 participating organizations, as well as interviews with the nonprofit consultant who supported the organizations.

This report begins with a brief description of some of the challenges the nonprofit sector is facing and the promise of nonprofit sabbaticals as a strategy to address these challenges. Next, a description of the Sabbatical Program and its objectives are described, followed by a profile of the sabbatical recipients and the evaluation methodology. The findings are then presented, which are organized by the impact on nonprofit leaders, the organization and finally, the nonprofit sector overall. Additional findings are presented about the long-term impact of the sabbatical. The final sections outline recommendations for organizations considering sabbaticals and lessons learned that extend beyond the sabbatical, particularly with the additional stressors and uncertainties nonprofits face as a result of Covid-19.

Nonprofit Sector Challenges

The nonprofit sector accounted for 12.3 million jobs in 2016 with nonprofit jobs growing almost four times faster than for-profit jobs in the last decade.¹ As are most institutions, nonprofits are faced with operating at increasing levels of complexity and uncertainty while responding to unique challenges such as a dependence on external funding, competition between other sectors for resources, and the need to measure, communicate and scale impact.

Given the sector's sizeable workforce and need to address many challenges, attention to the development, training and retention of talent is essential to a nonprofit's ability to execute on its mission. Unfortunately, nonprofit organizations, their leaders, and their respective funders have not made strategic investments in talent a priority. As a result, a lack of investments in the people behind the nonprofit mission has resulted in high burnout rates, reduced effectiveness of

¹ Salamon, L. & Newhouse, C. (2019). "The 2019 Nonprofit Employment Report," *Nonprofit Economic Data Bulletin* no. 47. (Baltimore: Johns Hopkins Center for Civil Society Studies, January 2019).

the executive director, difficulty recruiting and retaining qualified and high potential talent, and executive transition issues.²

While some funders and nonprofits are starting to recognize, value and take action to attract and retain talent, a quick look at some recent data show that more work needs to be done:

- Only 1 in 4 nonprofits have a leadership succession plan in place³
- Eight out of 10 nonprofits have no employee retention strategy⁴
- Businesses spend 4x more per person each year on talent development than nonprofits⁵
- Less than 1% of foundation dollars are invested in the nonprofit workforce²
- Two-thirds of leaders plan to leave their positions within 2-5 years, citing feeling under-valued (compensation) and under-invested in (lack of opportunities for development) as their top reasons for leaving³
- Costs to an organization of losing staff are estimated between 20-50% depending on the role⁶

Not only does this under-investment in talent threaten the ability of nonprofits to effectively fulfill their missions, it also threatens the future of the nonprofit sector as a whole.

Sabbaticals as a Strategy

While the term “sabbatical” is most often associated with granting employees the ability to take a break from their traditional work to still “do” or produce such as writing books, lecturing at other universities, or volunteering at nonprofits, the term “sabbatical” derives its roots from the Hebrew term ‘sabat’ meaning rest.⁷ In an effort to respond to the talent and challenges the nonprofit sector faces, a small but growing group of grantmakers have gone back to the root definition of sabbatical and developed a nonprofit sabbatical program as a way to literally allow EDs to rest, while building the capacities of nonprofit organizations.

One such foundation, the Durfee Foundation has designed a nonprofit sabbatical as an innovative strategy aimed at supporting the well-being of nonprofit leaders, building organizational capacity, and elevating leadership within organizations. It also explicitly links leadership development and succession planning.

² Stahl, R. M. (2013). *Talent philanthropy: Investing in nonprofit people to advance nonprofit performance*. *The Foundation Review*, 5(3), 6.

³ Sergeant, A. & Day, H. (2018). *Wake-Up Call: A Study of Nonprofit Leadership in the US and Its Impending Crisis*.

⁴ Nonprofit, H. R. (2017). *Nonprofit employment practices survey*. Retrieved from: https://www.nonprofithr.com/wp-content/uploads/2017/08/final_NEP_preview_infographic-1.pdf

⁵ Callanan, L., Gardner, N., Mendonca, L., & Scott, D. (2014). *What social-sector leaders need to succeed*. *McKinsey Quarterly*, 8.

⁶ Center for American Progress (2012). *There are Significant Business Costs to Hiring Employees*. <https://www.americanprogress.org/issues/economy/reports/2012/11/16/44464/there-are-significant-business-costs-to-replacing-employees/>

⁷ Eels, W. (1962). *The origin and early history of sabbatical leave*. *AAUP Bulletin*, p.253-256

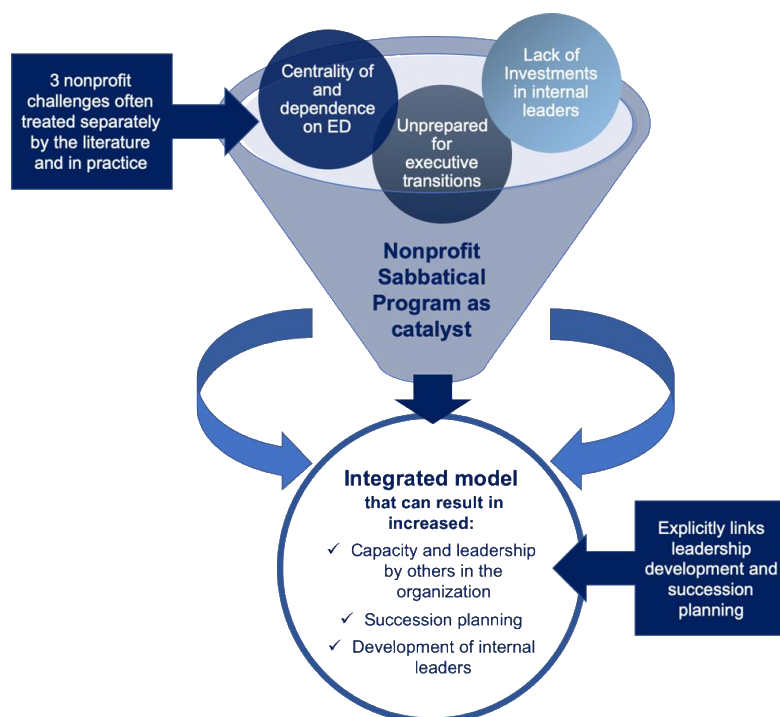
The nonprofit sabbatical design addresses three documented challenges many nonprofit organizations face:

Challenge	Sabbatical Design Element
Centrality of role of ED, which can lead to dependence on ED, ED burnout	Provides ED with extended time off, while requiring others (board and staff) within the organization to work together
Lack of development opportunities for internal staff	Provides opportunity for staff, especially an Interim leader to build leadership capacity 'on the job'
Unpreparedness for executive transitions	Requires organization to plan for and experience temporary executive succession

Many funders across the United States have taken Durfee's model and adapted it slightly to meet the unique needs of their nonprofit partners. See Figure 1 for a visual representation of how nonprofit sabbaticals address multiple challenges in the nonprofit sector.

Not only is this an innovative strategy, but the data indicate nonprofit sabbaticals often solve for these challenges. Independent evaluations have found that nonprofit sabbaticals have reduced burnout in leaders, and strengthened staff and organizations.^{8,9}

Figure 1. Sabbaticals Programs address key nonprofit challenges and link leadership development and succession planning.



⁸ Linnell, D. & Wolfred, T. (2009). *Creative disruption - Sabbaticals for capacity building & leadership development in the nonprofit sector*. San Francisco, CA. CompassPoint Nonprofit Services & Third Sector New England

⁹ The Center for Community Health and Evaluation. (2009). *An Evaluation of Five Years of the California Wellness Foundation's Sabbatical Program*. Seattle, Washington

Fieldstone Leadership Network San Diego's Clare Rose Sabbatical Program

Recognizing the challenges many nonprofit leaders and their organizations face, the Fieldstone Leadership Network San Diego, in partnership with funder Clare Rose Foundation, created the Fieldstone Leadership Network San Diego's Clare Rose Sabbatical Program in 2014 to support nonprofit organizations in San Diego and Orange Counties. It is modeled after the Durfee Foundation's Sabbatical Grant Program,¹⁰ valued at \$50,000 and includes the following program elements and expectations:

Organizational Requirements:

- ED Submits formal application including budget, with approval from board chair
- ED must have worked in the nonprofit sector for a minimum of 10 years
- ED must disconnect from organization, having no contact during the sabbatical period
- Organization identifies an Interim leader and/or Interim leadership team
- ED, Interim leader and board chair participate in an orientation
- Organization commits to establishing a professional development fund beyond sabbatical award

Fieldstone Leadership Network San Diego and the Clare Rose Foundation provide:

- 3-month paid leave for the ED
- Professional development funds to support the leadership development and skill-building of staff and internal Interim leaders
- Access to an experienced nonprofit consultant who is available to support the ED, staff, Interim leaders, and board throughout the sabbatical period
- Financial award for key staff who demonstrate exemplary leadership in the ED's absence

Program Objectives

The Fieldstone Leadership Network San Diego'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) Strengthen the nonprofit sector through cross-sector dialogue and collaboration among nonprofit leaders

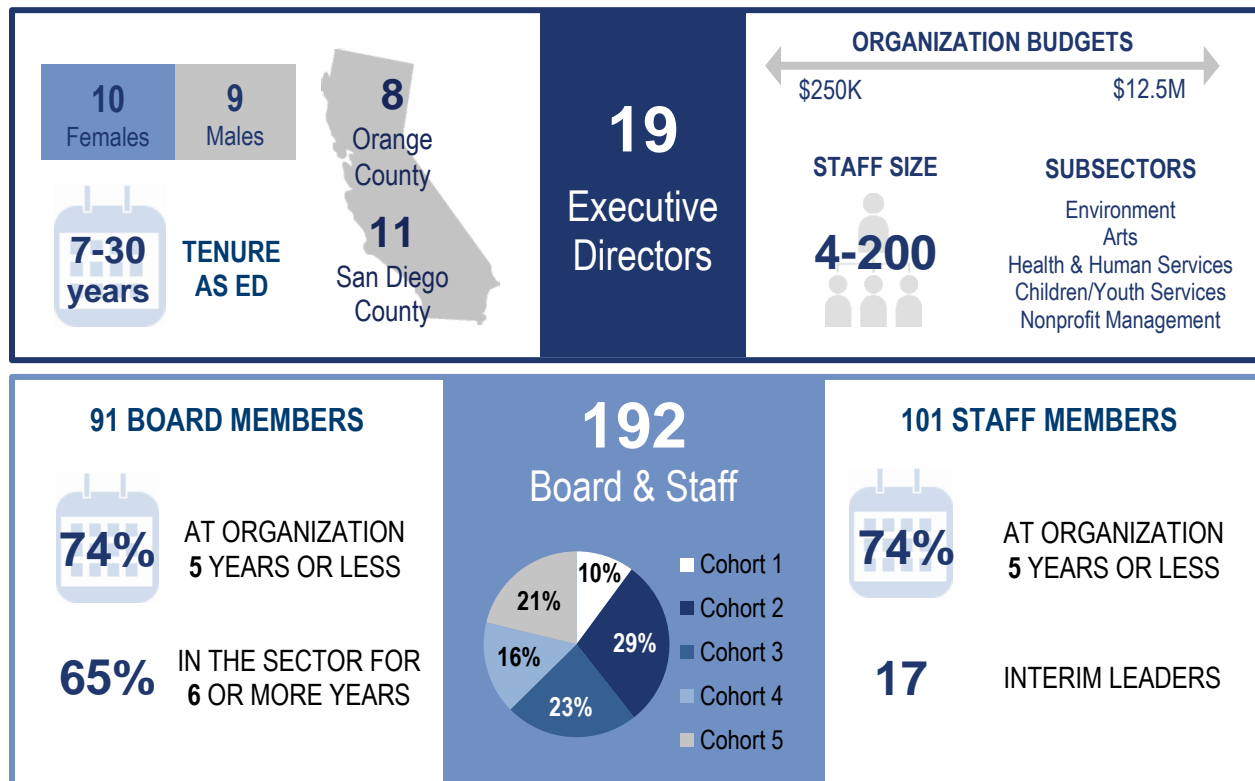


¹⁰ Linnell, D. & Wolfred, T. (2009). *Creative disruption - Sabbaticals for capacity building and leadership development in the nonprofit sector*. San Francisco, CA: CompassPoint Nonprofit Services & Third Sector New England.

PARTICIPANT PROFILE AND METHODOLOGY

Participant Profile

Below is a summary profile of the 19 nonprofit organizations that participated in the Sabbatical Program and a snapshot of the evaluation respondents.



Data Collection and Methods of Analysis

The study's findings are based on multiple sources of data, including pre/post surveys and interviews with all 19 EDs, as well as post-program data from board, staff and Interim leaders representing all 19 organizations. Additionally, researchers also conducted document review of previous evaluation reports and other related sabbatical materials. Nonprofit literature was also consulted to better understand key issues facing nonprofit organizations and literature related to leadership effectiveness was also reviewed.

Content analysis was used to identify themes from focus groups, interviews, and document review. Descriptive statistics were calculated for the Board/Staff retrospective survey and paired-sample t-tests were run for the ED Pre/Post survey. See Appendix A-C for detailed methodology and logic model. The ED, Board and Staff survey responses are summarized in Appendices D-E.

Formative Evaluation

As a new program for the Fieldstone Leadership Network San Diego, one component of the 5-year evaluation study was to conduct a formative evaluation to provide the organization with feedback as to whether the program was being implemented as intended and to make recommendations for improvement. Each year, NPI collected data and shared findings around

the implementation process, which led the Sabbatical Program to make changes. Note that the Sabbatical Program is designed for continuous process improvement and generative thinking, while still being flexible in adapting to individual and organizational differences. To this end, the Fieldstone Leadership Network San Diego 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.

FINDINGS

Strengthen Nonprofit Leaders

1. Strengthening Nonprofit Leaders: Executive Directors

Executive Directors: Made Personal Gains

For many of the EDs, the time they took off during the sabbatical was the first time they had completely disconnected from their work over the course of their professional life. During pre-and post-interviews, many shared stories of always working and rarely taking time off, and when they did, still being accessible to board and staff. One ED, a founder who served as leader for almost 30 years, shared that the sabbatical was the first time he/she had created an email address separate from his/her organization.

"I did not anticipate the value of rest. I couldn't remember the last time I took a vacation. I had 1-2 years vacation built up. I was surprised at the physical benefits of time off. For once, I had no headache. I didn't take one pill in four months. That was noteworthy for me."

– ED, Year 5

How EDs used their time off varied, though most spent some time traveling within and outside of the US, both alone and with family. One of the key themes that surfaced from interviews was having the time to intentionally reconnect with themselves and reconnect with family members, especially spouses and children.

Survey data show that 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 the consultant. In particular, after returning from the sabbatical, Figure 2 shows EDs reported improvements in their well-being and their ability to lead others and the organization.

91%

of board and staff surveyed reported the ED was more rested and rejuvenated post-sabbatical

Research Tells Us

Nonprofit leaders face a multitude of stressors daily, working more hours than their for-profit and government counterparts (Timm, 2016).

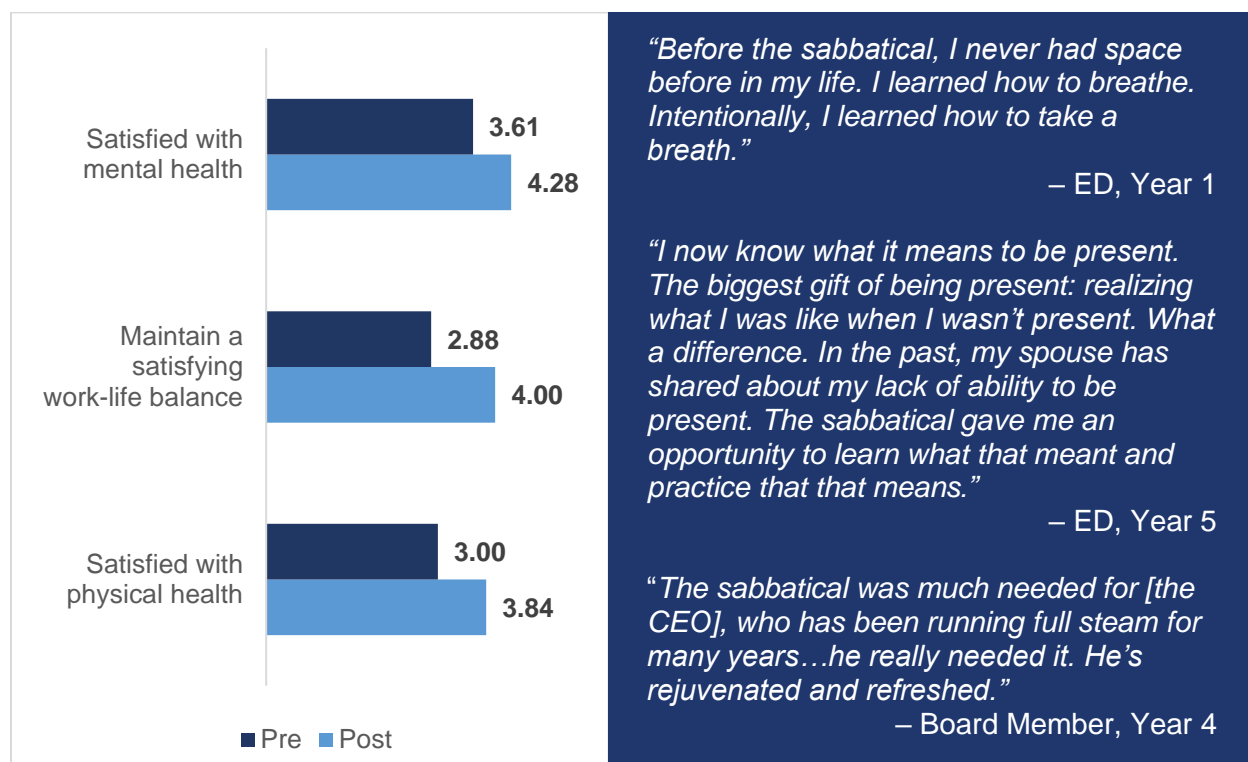
People who work too many hours don't get enough time to recover. Without enough time to recover from work, the resulting exhaustion impedes productivity, leads to accidents, illness, emotional dysregulation, and mistakes (Meijman & Mulder, 1998).

Recovery practices - increasing sleep, exercise, mindfulness, connecting to others, and practices to promote positivity may promote workplace resilience—building up more inner resources for the future, and ultimately promoting positivity (Ruderman, Clerkin, & Deal, 2017).



Figure 2. EDs report greater satisfaction with health and ability to maintain work-life balance as a result of the sabbatical.*

(n=19; Mean score on scale 1-Strongly Disagree to 5-Strongly Agree)



**statistically significant difference from pre to post*

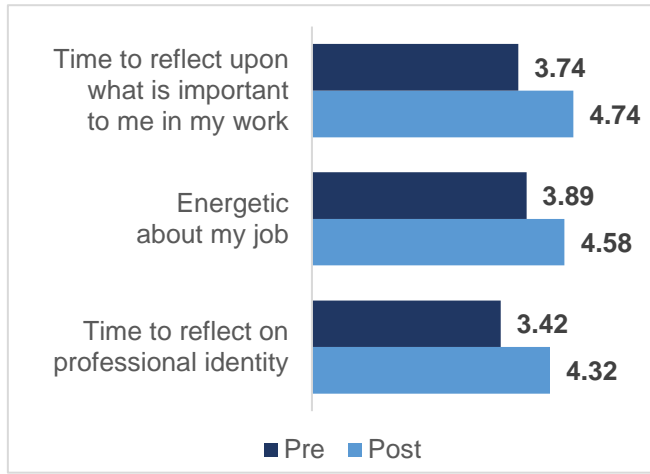
Executive Directors: Made Professional Gains

In addition to personal gains, EDs also reported impacts related to work. Specifically, as Figure 3 shows, they reported feeling more energetic about their job and taking more time for reflection post-sabbatical compared to before the sabbatical. Having time to think gave them an opportunity to reflect on their professional journey, reconnect their passions with their organization’s mission, and consider the parts of their role that they enjoyed most, and the parts that they enjoyed least.



Figure 3. EDs report increased time for reflection about work and feeling more energetic about their job.*

(n=19; Mean score on scale 1--Strongly Disagree to 5--Strongly Agree)



The sabbatical allowed for reflection on meaningful questions:

- Who am I and what is important?
- When I return, what am I going to say no to?
- What do I still want to be involved in?
- How can I do my best and let the rest go?
- Why and for who am I staying?

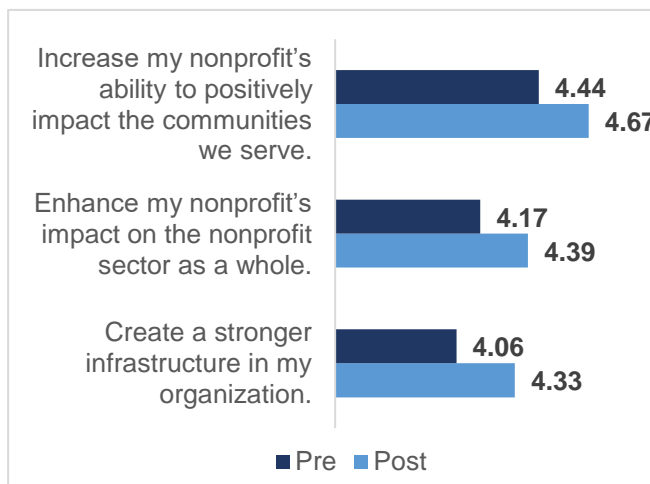
*statistically significant difference from pre to post

Interviews with EDs and survey data from staff and board also show that post-sabbatical, EDs thought more broadly and creatively, were able to delegate appropriately and focus on the organization's vision, and have greater impact in the community. This is also, in part, because during the sabbatical, Interim leaders and other staff carried out functions that were traditionally the EDs prior to the sabbatical. Finally having time for rest, reflection and renewal, Figure 4 shows EDs returned inspired and more confident in their own abilities to strengthen their organization and increase the positive impacts their organization made in the community.



Figure 4. EDs had greater confidence in their own abilities to impact their organization and the larger community.

(n=19; Mean score on scale 1--Strongly Disagree to 5--Strongly Agree)



"I find myself wanting to develop my team knowing our organization will expand as a result. I wonder how can I dim my star so others can shine more brightly?"

—ED, Year 5

"I know I can be a deeper leader. I have always been contemplative. Now have more tools and experiences to draw upon and recall."

—ED, Year 5

When the EDs returned, some reported continued delegation of key functions so that they could use their time to more strategically focus on the big picture. In the graphic below, the size of the bubble represents the frequency in which board, staff, and EDs mentioned the following themes.



As a result of the sabbatical, EDs increased delegation, providing them more time to focus on the big picture and the future.

Delegating

“Coming back, staff asked for approvals and I would say ‘you’ve been handling it, so I don’t think I need to see it.’ I would ask, ‘are you happy with it? Is it complete to where you think it is? Great, then I think it is done.’ I am: a) trusting staff and b) reinforcing the message, you did great without me. Go on your way.”

– ED, Year 2

“The sabbatical showed the ED importance of delegation. The group was forced to carry on without the key voice of the organization and the ED discovered the staff was able to carry out his/her vision very well.”

– Board, Year 5

Focusing on Big Picture

“I think my perspective is bigger...Like maybe we can turn down some partnerships and funding to be more strategic.”

– ED, Year 2

“I believe [the ED] has learned that delegating to capable staff will free up time to stay big picture for the organization.”

– Board, Year 3

“I know that the Interim leader has taken on more management responsibilities so that the ED can have more time spent focusing on the long-term plan for the organization.”

– Staff, Year 1

Future Thinking

“There has been growth in terms of leadership, professionalism, and staff members really stepping up into a bigger role with more responsibilities. I do feel like we’re ready for growth. Because we have a demand, and our programs are great. I just think that we have the energy.”

– ED, Year 3

“The current ED and [Interim leader] have a clear vision as to how to best position the organization in the future.”

– Board, Year 5

“Both ED and senior staff learned about what they did and did not want to do at the organization, and that there was symmetry in this learning, resulting in plans to change the organizational structure.”

– Consultant

“The CEO is now spending more time with development and forward/strategy thinking as we have always wanted.”

– Board, Year 3

1. Strengthening Nonprofit Leaders: Interim Leaders

Interim Leaders: Built Leadership Capacity, Skills on the Job

While it is easy to think of the Interim leaders as merely 'keeping the seat' warm while the ED is gone, survey and interview data from individuals serving as Interim leaders, whether alone or as part of a team, described that period of time as anything but static, and rather as opportunities for learning and development. As Table 1 shows, they shared that they had many different kinds of experiences, expected and unexpected, that challenged and stretched them to think and act differently than before serving in the role.



Individuals serving as Interim leader reported a variety of experiences while serving as Interim leader, some expected and some unexpected.

Table 1. Expected and Unexpected Experiences Report by Interim Leaders (n=17)

Expected Experiences	Unexpected Experiences
Increased supervisory responsibilities	Departure (voluntary and involuntary) of key staff member
Greater interaction with board members and staff	Loss of major funding source or partnership; reduction expenses
Increased engagement with community stakeholders and donors	Unexpected expenses
Increased oversight and management	Key contract negotiation
Leading planned fundraising events or key initiatives	Safety issue at the organization
Handling some conflict	Leading culture change initiatives
Representing the organization publicly	High-profile media relations issue

Research Tells Us

Most nonprofits do not have a strategy or budget available to identify and develop high-performing talent (Nonprofit Employment Practices Survey, 2017).

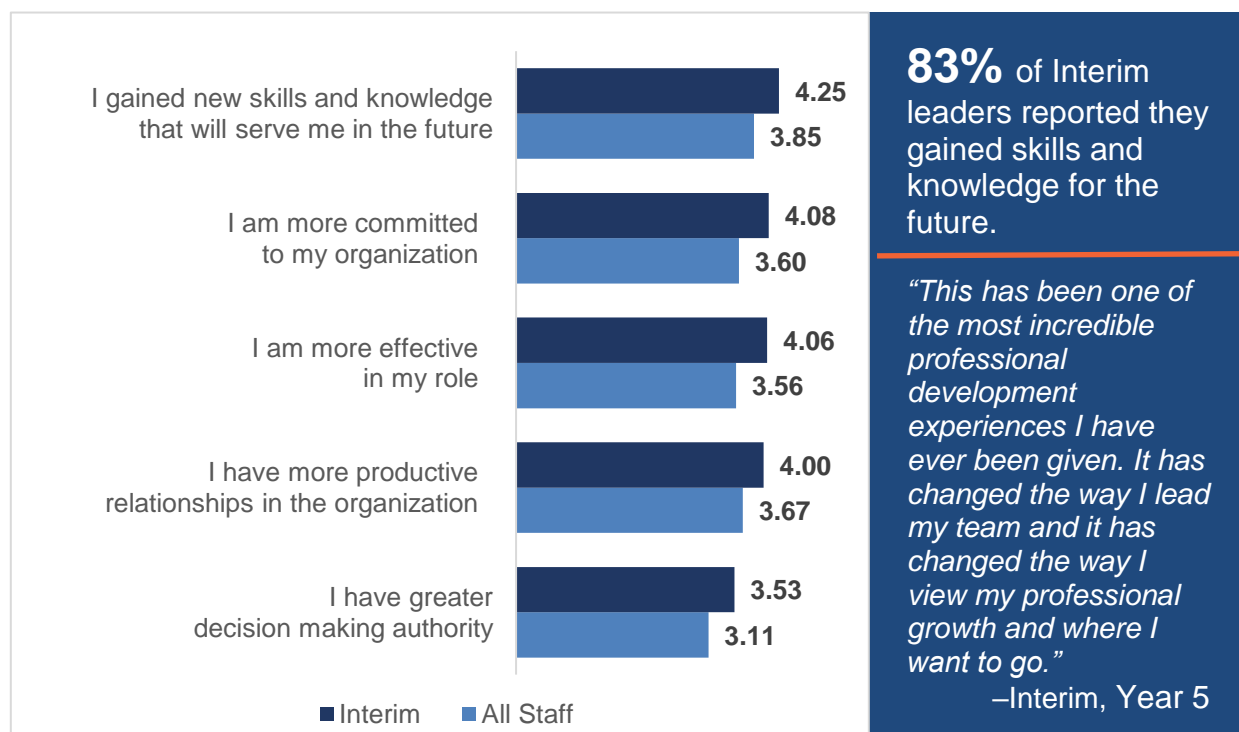
One of the biggest causes of leadership turnover is nonprofits' failure to develop their internal talent, driving high-performing staff to leave for growth opportunities elsewhere (Landles-Cobb & Kramer, 2015).

Data show that challenging job assignments on-the-job provide the most powerful learning opportunities for leader development (McCall & Lombardo, 1988).

Interim leaders shared that serving in this role was a valuable professional development opportunity that enabled them to learn key leadership lessons and build skills they could leverage beyond their current roles. Without the ED there, they were presented with experiences that required them to delegate, solve problems, and make decisions on behalf of the organization. It is important to note that both Interim teams and Interim leaders serving alone reported skill development, there were some notable differences in their experiences. For those serving on an Interim team, individuals reported that while they may not have gained as broad of a perspective of the organization than Interim leaders serving alone, they also did not feel as alone or as much pressure when a challenging situation came up or a difficult decision had to be made. Compared to the rest of the staff, Figure 5 shows that Interim leaders reported being more effective in their roles and more committed to the organization as a result of the sabbatical, which may be attributed to having more responsibilities and opportunities for skill-building.



Figure 5. Interim leaders built skills and were more effective as a result of the sabbatical (Mean score on scale 1--Strongly Disagree to 5--Strongly Agree)






Survey respondents who served as Interim leaders were also asked to describe the types of skills they developed that would serve them in the future. As Figure 6 shows, Interim leaders described improved confidence, leadership skill development, and increased decision making as some of the key skills they built during the sabbatical. Note, the size of the word represents how frequently the word or phrase was used.

Figure 6. Interim leaders' description of types of skills built



Through in-depth interviews with two Interim leaders and open-ended survey responses for all Interim leaders, data show Interim leaders built their leadership capacity in three fundamental ways while serving as Interim leader:

<p>Greater Awareness of Self + Organization</p> 	<p><i>"I knew the ED did a lot more than I realized, but learning the extent of what "a lot more" really means was staggering. It was empowering for me to see that I could (with the support of my team and the board) effect change despite the moments of "what do I do with this?" I learned that the support of the team was enough to get me through this time."</i></p> <p>– Interim Leader, Year 3</p>
<p>Functional Skills</p> 	<p><i>"I was pushed outside my comfort zone by taking a deeper dive into fundraising, events, finance, board management, and being the media spokesperson."</i></p> <p>– Interim Leader, Year 4</p>
<p>Leading and Managing Others</p> 	<p><i>"I got better at managing people. I also had to step-up to difficult conversations and was pushed to grow as a leader in that capacity."</i></p> <p>– Interim Leader, Year 1</p>

EDs, board and staff also reported increased skills and effectiveness of the Interim leader.

"Our Interim leader has been at the organization for 20 years. While I was gone, she thought through things from my perspective. She had to learn how to delegate things she would typically take on because she just couldn't while serving as Interim. She rose to the occasion. She led the organization through difficult decisions. She dressed up for presentations. She increased her communication. She leaned into the position and opportunity. I told her, I knew you could do it."

– ED, Year 5

"A situation came up that could have undermined our organization if it was not handled. The Interim's leadership in my absence was extraordinary. Opportunities for expansion came up and she took them and was successful. The sabbatical enabled all to see how well the [Interim leader] stepped up for the organization."

– ED, Year 4

Case Study: Strengthening Nonprofit Leaders



After founding and running the Malashock Dance Company for 28 years, John Malashock was ready to experience what it would feel like to go for an extended period of time without the weight of the organization on his shoulders. He had plans to play music, study photography and connect with his wife but his number one goal was renewal and reflection. As John shared, “the demands of the organization made it hard to get perspective.”

When it came time to identify who would take the role of Interim ED, Malashock’s Managing Director at the time, Molly Glynn-Puryear, volunteered and John knew she was the right choice. Molly, who began as an instructor for Malashock, had been with the organization for eight years at the time, serving in multiple roles, learning different parts of the organization. From Molly’s perspective, she could see how thin John was stretched and knew there were opportunities for greater organizational effectiveness.

From both of their perspectives, the organization was very dependent on John and his relationships, and the sabbatical could provide the opportunity for Molly and the board to take up more responsibility.

While John spent time in New Zealand, Bali, France, the Sierras, and at home, Molly grew her financial and business acumen, built relationships with board members, talked to and listened to the dancers about changes they wanted to see at the organization, and dealt with the unexpected challenge of having to make decisions about the organization’s space.

When John returned from his time away, the changes in Molly and within the organization were noticeable. John observed that Molly had, “moved from working for the organization to now being my partner and peer at the organization.” Molly too, acknowledged the changes, having a broader understanding of the organization, and feeling a greater commitment from and to the dancers. The same was true for her relationship with the board. While she was prepared to have John resume the responsibilities she had taken on during the sabbatical, she was clear that she enjoyed the role and a part of her hoped she would be able to continue leading in the same capacity after the sabbatical.

Having had time to reflect on his professional identity and what mattered most to him while away, John had also gotten clear – he wanted to focus more on the artistic side of Malashock and have more time for reflection, energy and creativity.

Several months after the sabbatical, the board recognized Molly’s proven leadership ability and John’s desire to refocus his time and energy, and created a new structure similar to other arts organizations. The Board promoted Molly to Executive Director as the administrative leadership and John to be her peer as Artistic Director. Years later, the model is still in place, both Molly and John are still at the organization, and the organization continues to thrive.



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

Organization: More Effective Staff and Board That Share Leadership

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 ways different from when the ED was present. The sabbatical strengthened the team's knowledge of what each other does and as a result, they often became a more collaborative group during, and even after the sabbatical. Roughly two-thirds of board and staff reported having a greater perspective of the organization (67%) and more positive and productive relationships (63%) as a result of the sabbatical.

"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, Year 5

In addition, board and staff both built their leadership capacity and became more effective.



Leadership capacity was built as a result of the sabbatical. (Percentage of 4s and 5s on a scale of 1 to 5 where 1-Strongly Disagree to 5-Strongly Agree)

80%

Board and Staff agreed that new leadership capacity was built within the organization as a result of the sabbatical

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

74%

Board and Staff agreed that the staff was more effective post-sabbatical

"We have stronger opinions on setting organization direction. We are 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, Year 2

67%

Board felt they were more effective post-sabbatical

"We have gone through our overall structure, evaluated our current staff, and determined where we need growth. Looking at some of the hats the ED wore, we realized he needs to pull away from them to allow him to be a more effective leader and engage with the community more." – Board, Year 5

Research Tells Us

Executive Directors play a uniquely central role in leading nonprofit organizations, often responsible for advancing the activities of the board as well as those of the staff and the organization overall. This can lead to unrealistic expectations on the executive director and an over-dependence by staff and board on the executive director and, in some cases, lower accountability practices in the organization (Herman & Heimovics, 1990).

Organizations that grow from having a dependent to an interdependent, shared leadership culture become more capable of creative action and can thrive in the face of disruption (McGuire & Paulus, 2015).

Organization: More Equipped to Respond to Executive Transitions

The Sabbatical Program also benefitted organizations substantially in that boards and staff were forced to broach a topic that has become taboo in many nonprofit organizations: succession planning. Whether in the nonprofit, for-profit or public sector, executive transitions are inevitable over the course of an organization's life cycle. Leaders retire, take new jobs, start businesses, battle illnesses, or decide to stay home with family. Often, because organizations do not engage in succession planning, the prospect and realities of these departures are met with fear and dread given the costs – money, stress and time associated with replacing an ED/CEO.

Although only away from the organization for 3 months, the ED's departure from their organization served as a potential temporary executive succession event and therefore required the organization to think through the people, processes and plans related to the departure of the ED. The formal process began with the application to apply for the sabbatical and carried through to the return of the ED. Having planned for and experienced a "dry run" of what it was like without the current ED, organizations were more equipped to handle executive transition, planned or unplanned.



Succession Planning Increased as a Result of the Sabbatical

(percentage of organizations, EDs, board and staff who "Agree" or "Strongly Agree")



of organizations engaged in and created a temporary succession plan (n=19)



of EDs reported that the sabbatical made them reflect on their role and consider their own potential succession



of board members reported that the sabbatical redirected thinking about executive transitions and succession planning

Research Tells Us

Less than one-fourth of nonprofit organizations have formal succession plans, leaving nonprofits to scramble to fill executive director and c-suite positions and resulting in the loss of already limited time and funds (Seargent & Day, 2018).

Only 30% of C-suite roles in the nonprofit sector were filled by internal talent in the past two years, about half the rate as for-profits. (Landles-Cobb, Kramer & Smith-Milway, 2015).

"I think really, the gift is to the board. Because the board is now getting everything tightened up at the organizational level - all the T's crossed, all the I's dotted. The staff is getting ready, and they're getting a test drive."

– ED, Year 5

"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, Year 3

"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, Year 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, Year 3

82% of nonprofit board members

from all 19 organizations indicated that the sabbatical redirected thinking on organizational transition and succession planning.

On a national level, only 25%

of organizations report having a succession plan to replace senior leadership, which is an essential component of sustainability planning

(Seargent & Day, 2018)

Organization: More Strategic Investments in Talent Development

For most organizations, the Sabbatical Program was, in essence, an intentional investment in talent across the organization. EDs had time to renew, staff and board had opportunities to lead and collaborate, and the process highlighted gaps in the organization that needed focus and attention. As a result, EDs and board members were better able to see that investing in talent (people) is, in fact, contributing or supportive to an organization's mission rather than something that conflicts with or takes resources (time, money) away from the mission. Subsequently, most EDs as well as board and staff, report being more intentional about the development of talent beyond the sabbatical.

"We realized we need more people. There are real gaps. Looking at roles, we've retooled the org chart. How do I keep the Interim in a high profile role? I want her to be positioned as co-leader."

- ED, Year 5



of board and staff reported more opportunities for professional development for the staff as a result of the sabbatical



Organizations made more strategic investments in talent as a result of the sabbatical

Study respondents shared that as a result of going through the sabbatical program, they developed new policies, processes and strategies related to talent development. As organizations compete for the best talent, these kinds of investments communicate to existing and future employees that their development matters. Below are examples of primary investments in talent made by organizations as a result of the sabbatical.

Types of Investments in Talent Organizations Made as a Result of the Sabbatical

- Earmarked funds for professional development, overseen by staff
- Mini-sabbaticals and uninterrupted time-off for other employees
- Extension of/changes to vacation policies
- Promotion, changes to titles, job descriptions
- Increases in salary
- Changes to organizational chart

“The staff development fund is great and many staff are now taking advantage of becoming more educated.”

– Staff, Year 4

“As a result of the sabbatical, we have created a hiring committee with the goal of reducing turnover.”

– Board, Year 2

“I really valued my time off and now value my staff’s time off too. In the past, I might have interrupted their vacation. No way am I going to do that now.”

– ED, Year 4

“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, Year 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, Year 3

“Tomorrow, [Interim leader] leaves for three weeks and I have told him to unplug. Another staff will also leave for a couple weeks. These mini sabbaticals are for them so they can experience the feeling of disconnecting.”

– ED, Year 5

Organization: Disruptions Engendered Challenges Post-Sabbatical



EDs, Staff and Board reported some challenges post-sabbatical

The most frequent challenge shared across years by board, staff and EDs is that the period following the sabbatical was a difficult one. This is not surprising considering so much change happened during the sabbatical period. Having time away, EDs returned with clarity about their own leadership approach and the future of the organization, while board members had also gained insights into the strengths and weaknesses of the organization and clarity about the priorities and role of the ED. At the same time, Interim leaders developed key leadership skills, and staff and board had experiences that resulted in key decisions for the organization and new ways of working together in the EDs absence. Not surprisingly, all of these changes in perspective and action were not always or immediately aligned, resulting in some tension. This was expected to some extent and the data suggest that in most cases, shared dialogue and discussions post-sabbatical resulted in changes in the organization that benefited everyone. In a few cases, however, when there was not discussion, it created some frustrations and/or conflict within the organization. Below are some example challenges noted by Interim leaders, staff and EDs.

Reported by EDs:

"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, Year 3

"It was awkward. What does the Interim want to keep doing? What do I want to take back? What if we don't agree?"

– ED Year 2

"One of the people that was empowered to step up as a leader; I feel like we're almost vying for power/competition."

– ED Year 1

Reported by Interim leaders:

"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."

– Interim, Year 3

"Staff and board still look to me (Interim leader) as a decision maker and it sometimes challenged with the ED."

– Interim, Year 5

Reported by Staff:

"We are all trying to hold on to the value, autonomy and efficiency that we found during the sabbatical. If anything, the trick is finding a way to gradually transition the ED back into the process comfortably. We don't want to leave him out but we also don't want to lose some of the more positive changes that were made in his absence."

– Staff, Year 5

“It was a bit of a rough transition after the sabbatical because those of us who were elevated for three months now had to go back to focusing only on our previous responsibilities.

– Staff, Year 4

“Staff discussed different ideas on how to effectively run our programs on a different cycle. Additionally, we discussed continuing to serve as a Leadership Team moving forward. However, many of the ideas that the team had were put on hold to discuss until the summer. Additionally, the reporting structure returned to how it was prior to the sabbatical. We are disempowered. We were once in a position of autonomy and authority and this have now changed to a micro-management organization.”

– Staff, Year 5

Reported by Board:

“We realized that there was a great need for additional support in operations and development. We realized that ED may have been taking on too much in these departments, was not delegating these.”

– Board, Year 4

“The entire role of the ED is being evaluated as a result of the sabbatical. The Board and the staff believe that the ED role needs to be removed from day to day operational issues and concentrate in the development and growth of the overachieving vision and strategy of the organization.”

– Board, Year 5

Challenges should not be viewed as solely negative. Rather, challenge and tension are often a sign of growth. In the case of the Sabbatical Program, it is intended to create change on the individual and organizational level, which can be difficult. However, if organizations can get better at navigating and working through challenges, they will be stronger and may be well-positioned to respond to uncertainty and change in the future.

Case Study: Building Organizational Capacity



For more than a decade, John Ohanian, CEO, and his Vice President, Bill York, both played a tremendous role in helping advance 2-1-1 San Diego's mission to connect more San Diegans in need with critical information and care.

Shortly after one of San Diego's 2018 wildfires, in which 2-1-1 led the way connecting those in need with essential resources, John left for a much-needed sabbatical.

While John was on his sabbatical, Bill stepped in as Interim CEO and had the opportunity to lead the organization and build deeper connections with board members. Other members of the management team also stepped into expanded roles within the organization. During the sabbatical period, a major event occurred and the team exceeded all expectations – doubling attendance and revenue. The staff learned how to prioritize, delegate and adapt to changes, while strengthening the organization and its services in the San Diego community.

Driving across the country during the sabbatical provided John with time to reflect and in doing so, he realized he wanted to make an even bigger impact, at 2-1-1 and beyond. Returning to 2-1-1 he set an even greater vision and was able to deepen his influence at the state level, in part, because of how things went while he was gone. Ohanian shared, "the organization did great, the board chair enjoyed building connections to Bill, Bill learned how to navigate the board, and the team worked hard. It made me confident that if tomorrow I were to say, 'I am out of here, I will be a special advisor,' they could run the place. I don't question it anymore. I know that Bill's the guy. He won't talk me out of leaving anymore even if he doesn't want me to go. He's in a good spot. It's a good team."

When an opportunity in 2020 became available for John to play a key role that would both advance 2-1-1 San Diego's mission as well as the mission of many other California nonprofit and government agencies, he knew he was ready to move on and Bill York was ready to become the next President & CEO, in part because of Bill's demonstrated leadership while John was away during the sabbatical.

In March 2020, John became the Chief Data Officer and Senior Advisor on Innovation for the California Health and Human Services Agency and Bill York became 211's new President & CEO. In this instance, the sabbatical paved the way for succession planning that provided huge cost-savings to the organization and a smooth executive transition with little disruption.



3. Sustain a Vibrant Network

Network: The Sabbatical Program Raised Awareness About the Value of Sabbaticals

The Fieldstone Leadership Network San Diego aims to sustain a vibrant sector through its leadership and organizational development program, including the Sabbatical Program. The three goals of the Sabbatical Program are reciprocal in nature, in that strengthening leaders (both EDs and the Interim leaders) and building capacity within an organization can ultimately better prepare individuals and organizational systems across the sector. Likewise, efforts to sustain a vibrant network through building connections and sharing experiences and lessons learned among sabbatical recipients can also strengthen leaders and organizations. For this to happen, the benefits of a sabbatical must be shared sector-wide.



The Sabbatical Program raised awareness about nonprofit sabbaticals and the importance of investing in leaders

Five years since its inception, the Sabbatical Program has raised awareness about the inextricable link between the well-being of nonprofit leaders and the health of the nonprofit sector. The Sabbatical Program contributed to a larger dialogue about the challenges facing nonprofit leaders and their organizations, and raised awareness around sabbaticals as one way to address these challenges. EDs, staff and board members shared examples of taking advantage of informal opportunities to discuss their sabbatical experiences with friends, donors, and colleagues. Additionally, over the course of 5 years, more formal initiatives

have been implemented to raise awareness of the value of sabbaticals. Examples include presentations by sabbatical recipients as part of local networking events and conferences aimed at nonprofit leaders and board members, spotlights in subsector publications, shared blog posts and donor presentations on sabbatical experiences by EDs. Also noteworthy, early findings from this evaluation were shared and recognized at a national nonprofit research conference.

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

– Consultant

"The very ideas of capacity-building and sabbatical are wonderful, not just for the Executive Director, but also for staff. I would like to see the ideas surrounding the sabbatical, including "rest", "refresh" and "balance" become more embedded in the fabric of our organization as a whole. Our clients will benefit from these ideas too."

– Staff, Year 1

Research Tells Us

Nonprofits play a critical role in the delivery of critical services and the creation of community on a local level (Anheier, 2009).

When nonprofit leaders connect with each other, they reduce isolation and loneliness, build social capital and increase their ability to have greater influence and reach (Putnam, 2000).

"It was a trip of many lifetimes and it was important to me to bring it back to our supporters, my adventures and the gift of going away after rarely taking a vacation in almost 20 years."

– ED, Year 5

"There is greater awareness of the sabbatical; I get asked a lot of questions, none of which I initiate. I think they hear what could be for them. A colleague of mine in Minneapolis wants to know more. I think there is a huge value in promoting to those that become familiar with the idea of the sabbatical and develop a thirst."

– ED, Year 3

"I have been a corporate exec 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. 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, Year 4

"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, Year 2



Relationships between nonprofit leaders grew and networks were strengthened

Built into the program design are opportunities for EDs and Interim leaders to meet with current and past sabbatical recipients to reflect on their experiences, challenges and leadership approach before and after the sabbatical. EDs who already went through the program were invited to share their experiences and best practices with those who were about to embark on their sabbatical. Similarly, there were opportunities for individuals serving as Interim leaders to connect and reflect with each other. As a result, networks of support were created for leaders to form bonds and be vulnerable with their peers, which has extended beyond the sabbatical.

"I saw a past Sabbatical recipient at our local Governance Symposium. We weren't connected before but I asked him how the sabbatical worked. I applied and got it. Now, people are continually remembering me about my sabbatical. I think the nonprofit community is ready for it."

– ED, Year 3

"We consulted with a past sabbatical recipient, and she came and met with our Leadership Team prior to the Executive Director leaving, and she shared with us her experiences, which was very powerful."

– Board, Year 5

"I met up with another Interim leader to talk about some of the challenges I was experiencing. It turns out they were dealing with some of the same things. I was relieved and didn't feel so alone."

– Interim, Year 2

"[The sabbatical] allowed us to create opportunities for other [sector specific] professionals in the local community, created partnerships with universities to expand the company's impact on a national level, and established a relationship with [a funder] and [an international company] that has the potential to provide global collaborations and opportunities."

– Staff, Year 2

Case Study: Sustain a Vibrant Network



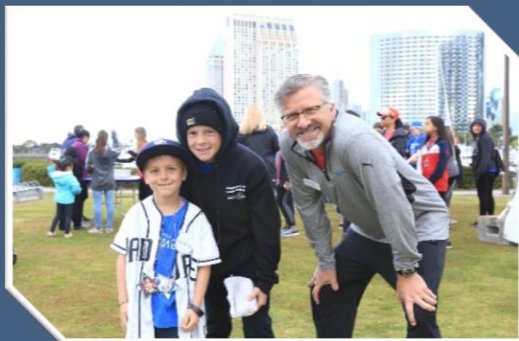
After 12 years at the helm of Make-A-Wish® San Diego, President and CEO Chris Sichel was starting to feel the cumulative effects of working long hours to grant as many wishes as possible to kids with critical illnesses. While he was still performing at a high level, he was physically and emotionally exhausted and the sabbatical offered him the opportunity to step away and spend time with family and time alone, walking the Santiago de Compostela.

While Chris took the time he needed, Suzanne Husby, VP of Mission Delivery stepped in as Acting CEO. To be able to grow in the Acting CEO role and effectively take on some of Chris' responsibilities, Suzanne was forced to delegate other parts of her job to the rest of the team. Initially feeling bad giving staff more work, she soon discovered that her team also wanted to grow and be stretched. What resulted under her leadership, she explained, was a Make-A-Wish San Diego team that was “more cross-trained and more capable of handling sudden challenges and changes that come up.”

Ninety days later Chris returned renewed and, as he shared, ready “to grab all of my duties back as they were before” but he quickly realized that wasn't what the team wanted. Together, they found their footing and clarified how they could sustain some of the work and roles from the sabbatical, moving into a more shared leadership model and organizational culture.

Several months later, observing how successful the organization had been while Chris was gone, Make-A-Wish America contacted them asking for help with their Los Angeles Make-A-Wish chapter after the departure of the CEO and most of the C-suite staff. With the sabbatical experience under their belt and a more capable staff sharing leadership, it was very easy for the organization to say ‘yes’ and send Chris to L.A. to share his expertise to help them get back on their feet while they searched for a new CEO. Suzanne described the effect of the sabbatical perfectly, sharing “this was a way for us to leverage our experience here and share it with our friends in L.A. so that they could keep running. It was neat how our sabbatical helped affect another chapter, and therefore, another community of wish kids.”

Reflecting back, Chris shared that while he had hoped the sabbatical would provide him with the rest and renewal he needed to keep going, he had “no idea just how much the sabbatical would increase the capacity of our organization and our impact on the larger community.”



LONG TERM IMPACTS

Five years of data across 19 organizations support previous research¹¹ on nonprofit sabbatical programs and suggest that sabbaticals, when implemented thoughtfully and with both the ED and the organization in mind, can serve as a catalyst for capacity building that can ultimately strengthen and sustain nonprofit organizations.

As a result of the sabbatical program, EDs and Interim leaders improved well-being and increased systems thinking. Interim leaders developed new skills and were more effective. 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.

In 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 Years 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."

¹¹ 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 Years 1 & 2)

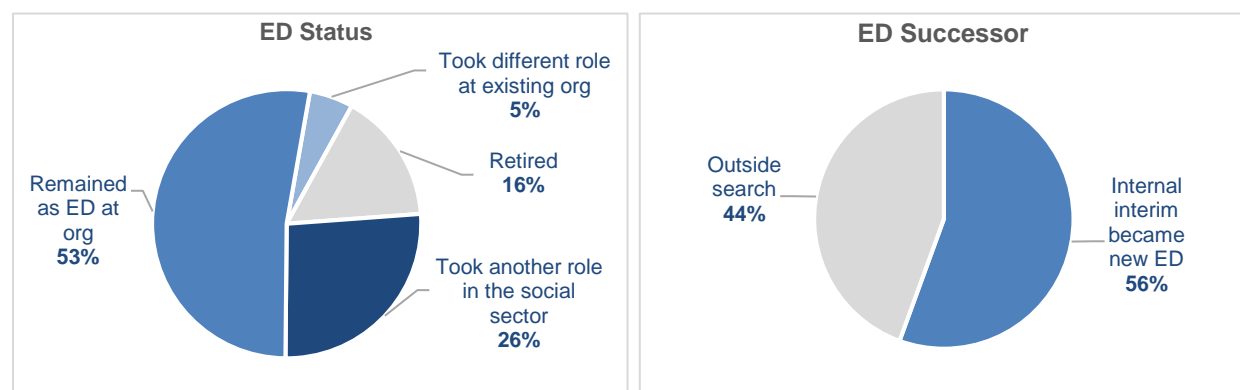
<p>ORGANIZATION: Long-Term Benefits</p> <ul style="list-style-type: none"> - Culture of well-being - Succession planning discussed and enacted - Decreased focus on ED/Increased focus on staff - Greater shared leadership - Stronger bond between board and staff - More autonomous and connected staff 	<p><i>"We are more open, less focused on just the organization. We are also focused on employees and leaders."</i></p> <p><i>"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."</i></p> <p><i>"A lot of responsibilities are now taken on by [other staff]. We have well-defined roles."</i></p> <p><i>"My role is perceived as less important. When I take two weeks of vacation, its fine."</i></p> <p><i>"I used the succession plan from the sabbatical as a framework for staff departures."</i></p> <p><i>"There is a better bond between the staff, a much stronger feeling of camaraderie and confidence."</i></p> <p><i>"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."</i></p>
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Sabbaticals paved the way for smoother, shorter executive transitions (n=19)

One of the biggest hesitations board members have shared in approving their organizations sabbatical applications is the fear that the ED will leave their organizations, and perhaps the sector overall. Data from this 5-year study, however, show that of the 19 organizations that participated in the study, more than half of the EDs (53%) still remain in their role at their organizations and of the EDs who have transitioned, one remained at the organization in a new role, 15% retired, and 25% took another role in the social sector. See Figure 6.

Of equal importance is that of the organizations that did experience executive transition, more than half of them (56%) identified the Sabbatical Program Interim leader as the permanent successor. As a result of going through a dry run through the Sabbatical Program, organizations reduced the period of uncertainty that often accompanies the departure of a leader, in addition to saving the time, effort and resources required to conduct an executive search.

Figure 7. More than half of EDs remain in their role post-sabbatical and in cases where they left, more than half appointed the Sabbatical Interim leader (n=19)



Case Study: Long-Term Impacts



After twelve years of serving as CEO of Mama's Kitchen, a nonprofit that delivers nutritious meals to those in need, Alberto Cortes journeyed to South America on his sabbatical in 2015, eager to put some distance between himself and the organization so he could gain perspective and de-stress.

While he was away, the Interim leadership team shared that they learned to work better together and improved their communications with each other and the board. The board also reported increased interactions with staff and taking greater fiscal responsibility for the organization.

According to Alberto, the sabbatical gave him the opportunity to reflect on how he approached work and get clarity that he wanted to lead differently. When he returned, the leadership team continued to have greater ownership in their expanded roles from the sabbatical, and Alberto was able to step into more of an ambassador role for the organization. As a result, his experience led to a change in his leadership style, feeling more confident and clearer about the larger impact he thought Mama's Kitchen could have on the community.

Alberto leveraged that clarity and new found energy following his sabbatical, expanding programs to reach even more San Diegans in need, delivering meals to individuals with type 2 diabetes and congestive heart failure. In a focus group a few years later, Alberto credited the sabbatical as instrumental in helping the organization go through this transition. At that time, he shared, "we are going through a transition organizationally that I am not sure if we would have gone through without the sabbatical. I have a greater sense of curiosity; we have an expanded mission and alternative sources of income. There is a lot of activity and, if successfully executed, could ultimately mean a substantial change for the organization."

Five years since the sabbatical, the demand continues and Alberto continues to respond. Now in his role for 18 years, in March 2020, Alberto and Mama's Kitchen were asked to step up and literally increase the plates in response to COVID-19. The clients of Mama's Kitchen suffer from critical illness, many of them age 65+ and particularly vulnerable to COVID-19, and a significant portion of their volunteers are 65+ and advised to stay home for their safety.

Since the beginning of the COVID-19 crisis, Mama's Kitchen increased their new clients by 43% and delivered record-breaking numbers of meals. In addition to their regular meal deliveries, they delivered more than 18,000 pounds of nonperishable food, a one-week emergency supply to more than 500 clients.



RECOMMENDATIONS FOR BOARD, STAFF AND EDS CONSIDERING A SABBATICAL

Sabbatical Considerations

1. **Change the narrative around the purpose of the sabbatical.** We heard from some EDs that board and staff referred to the sabbatical as a vacation for the ED, which added to existing feelings of guilt for taking time off. The sabbatical is not only for the ED. It is an organization-wide change initiative that involves everyone as senior leadership increase their responsibilities and share leadership.
2. **EDs work hard and they need a break.** We learned from many EDs that they work relentlessly, through evenings, weekends, and vacations to execute on their organization's mission. They need to be recognized for their contributions, and they need time for rest and renewal.
3. **Staff are hungry for opportunities to grow.** EDs and boards expressed some concern and/or guilt about 'dumping' extra work on staff prior to the sabbatical. However, many realized their assumptions were incorrect and staff, especially Interim leaders, were hungry for opportunities to lead, build skills and build relationships.
4. **Plan with everyone but don't plan too much.** There is value in raising concerns and clarifying roles with board, Interim leaders and staff prior to the departure of the ED. However, it is also important to not put too many constraints on the organization so that Interim leaders and boards have to wait to make key decisions until the ED returns.
5. **Expect some challenges and use the support provided.** The sabbatical is a tool for change and some challenge is inevitable - and a potential signal of growth. Staff shared that the Consultant was an invaluable resource in anticipating those challenges and when unexpected situations came up and the Interim needed to talk through solutions. The Consultant was also instrumental in helping organizations plan for the re-entry of the ED.
6. **Leverage the sabbatical for additional resources.** Framing it as a capacity-building initiative, some organizations leveraged the sabbatical impacts to apply for and secure additional capacity building funds and as an opportunity to connect with individual major donors.
7. **Treat reentry with intention, especially for the ED and Interim.** Some EDs shared reentry was hard, as they had to redefine how they fit in the organization with changes that had made. Similarly, some Interim leaders shared that they felt demoted when they had to go back to their original roles after having an opportunity to lead.
8. **Continue the gains.** It shouldn't be business as usual post-sabbatical. Engage in ongoing dialogue with board, staff and the ED about how to sustain sabbatical gains for everyone. Could the Interim continue to carry some functions allowing the ED more time to further build the capacity of the organization? Can a shared leadership model continue?
9. **Review your talent investment strategy.** A 3-month sabbatical may not be an option but there are many opportunities to recognize all staff and communicate their value. Consider mini-sabbaticals, on-the-job stretch assignments, and other retention strategies that are good for staff and the organization.

BEYOND THE SABBATICAL: LESSONS FOR TODAY

Covid-19 is putting tremendous stress on nonprofit organizations, EDs, boards, staff and the communities that they serve. A study conducted by the Nonprofit Institute in May 2020 found that nearly 75% of San Diego nonprofits have had to reduce or stop operating temporarily. At the same time, while demand is rising significantly, nonprofits also report a loss in individual donations and fee-for-service revenue.¹²

Although the conditions created by the Sabbatical Program by no means mirror the harsh realities produced by the pandemic, there are some lessons from an *intentional pause* (the sabbatical) that may lend themselves to organizations experiencing this *forced pause* (as a result of Covid-19).

1. **Leaders need to make time to renew and focus on their well-being and organizations need to support them.** Having time away from their organizations to focus on themselves during the sabbatical, EDs improved their well-being and returned to their organizations with more energy and greater clarity. While extended time away from the organization may not be realistic during the pandemic, now more than ever, EDs need to be encouraged and supported to set boundaries and take time to recover from their work, which may now involve re-evaluating fundraising strategies, managing virtual teams, pivoting programs for virtual delivery, and managing the anxiety of staff. This type of encouragement may need to be explicit from board as many EDs in the sabbatical program shared that while they felt overwhelmed and exhausted prior to the sabbatical, they felt an overwhelming sense of guilt about tending to themselves or taking time off. Other EDs shared that they had been going full steam for so long they had not even realized how burned out they were. An extension to this lesson is the importance of all staff taking time to renew and focus on their well-being in these times, particularly as everyone is being asked to step up their contributions.
2. **Use the disruption as an opportunity to make or at least test shifts in culture, programs, and existing structures.** Without the ED to rely on to carry out all of the major functions of the organization, board and staff had to create new ways of working together, which often involved more communication and collaborative problem solving and decision making. As a result, they developed a deeper understanding of the organization, built respect and trust between each other, and developed new ideas together and a shared approach to the work of the organization. When the ED returned, for many organizations, the collaborative approach was sustained beyond the sabbatical, providing staff and board with a continued sense of ownership within the organization, and freeing the ED to be more strategic and focus on the future. To an even greater extent, Covid-19's disruption may be forcing organizations into new ways of delivering programs, raising funds, and building more equitable organizations. There is an even greater opportunity to reconnect with mission of the organization, and invite greater contributions and partnership with staff, board, and constituents to help solve for the challenges of today and envision the future.
3. **Organizations must be intentional about not going back to 'business as usual.'** Data from the Sabbatical Program evaluation show that it can be difficult to sustain some of the changes that occurred during the sabbatical because of how easy it is to backslide into years-old habits and ways of working once the ED has been back for several

¹² Young, Emily; Deitrick, Laura; Tinkler, Tessa; Meschen, Connelly; Strawser, Colton; Funderburk, Taylor; and Abruzzo, Tom, "Unprecedented Disruption: COVID-19 Impact on San Diego Nonprofits" (2020). *Nonprofit Sector Issues and Trends*. 5. <https://digital.sandiego.edu/npi-npissues/5>

months. EDs shared difficulties in sustaining the sabbatical mindset in terms of protecting time for rest and work/life balance against the continued demands of the job. Staff at a few organizations observed patterns of EDs returning to operate at the center of the organization, where most communications and decisions reverted back to them. The reality is that following the disruption of the sabbatical, the organization, staff, EDs and board are forever changed so going 'back to the way it was' was problematic. Rather, to sustain those changes, organizations had to reflect on, learn from, and integrate lessons from sabbatical experience into the organization post-sabbatical. Similarly, as the country opens up again, it is important to understand how intentional all organizations and their leaders need to be about learning and growing from the challenges of Covid-19.

APPENDIX A: METHODOLOGY

The findings presented in this report are based on multiple data sources. The NPI research team designed and collected Year 1, 2, 3, 4, and 5 data from all 19 organizations between December 2014 and November 2019.

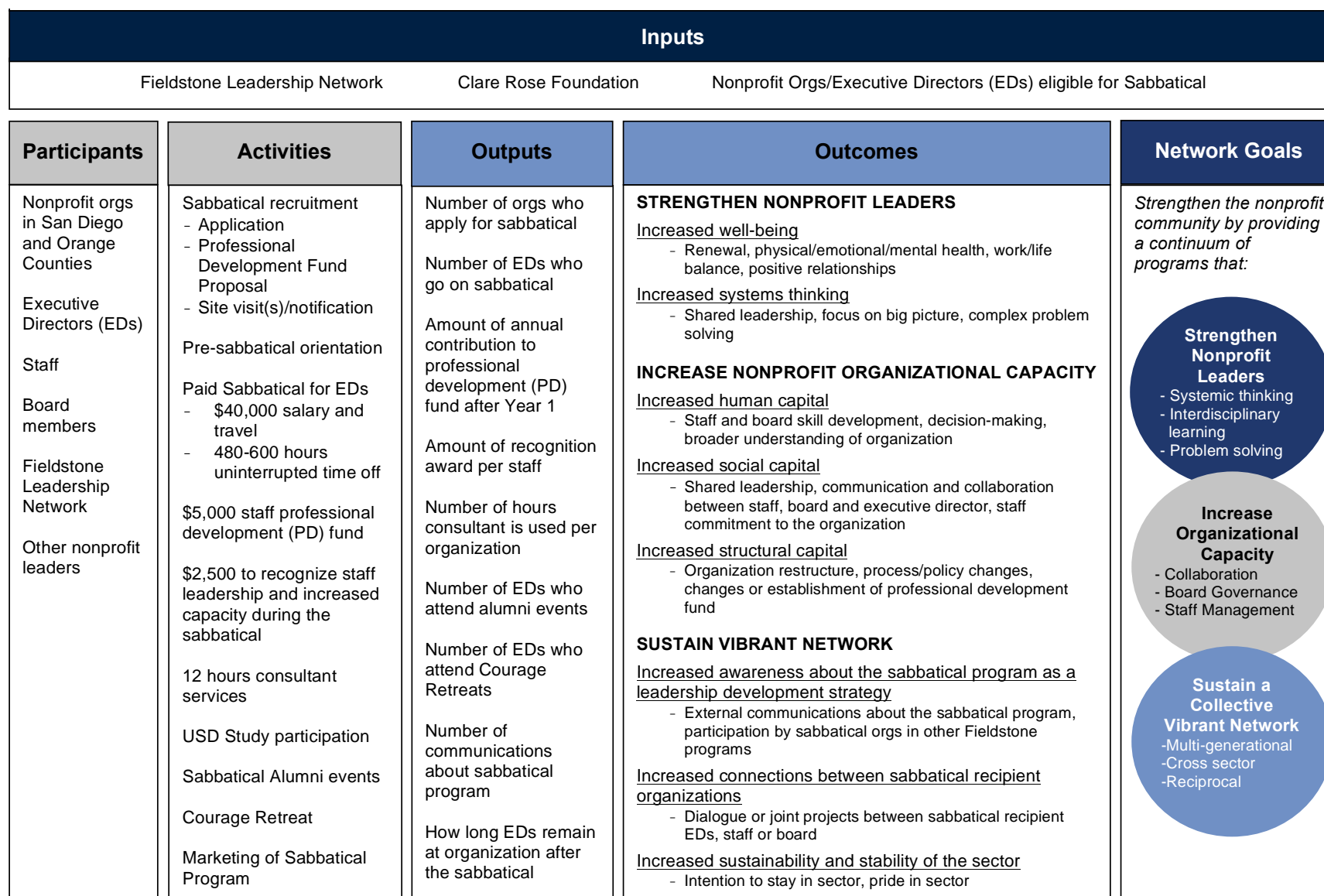
Data Type	Description
ED Pre- and Post-Sabbatical Survey n=19	Online survey administered to EDs 2-4 weeks prior to their departure and 8-10 weeks after their return. All 19 EDs completed both surveys.
ED Pre- and Post-Sabbatical Interview n=19	90 minute in-person interview with EDs 2-4 weeks prior to their departure and 8-10 weeks after their return. All 19 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=91 (board) n=101 (staff)	Online survey administered to staff and board 8-10 weeks following the sabbatical return. Out of the 273 board and staff who were asked to participate, 192 (70%) completed the survey.
Consultant Interview n=1	Three 90-minute in-person interview with consultant 8-10 weeks after the last ED from each Year returned from sabbatical.
ED Focus Group n=7	60-minute in-person focus group with EDs from Year 1 and Year 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 19 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 years, including:

- **Year 2:** A logic model, designed to refine the goals of the Sabbatical Program, was developed in collaboration with the Fieldstone (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.
- **Year 5:** No revisions were made to interview or survey questions.

APPENDIX B: CLARE ROSE SABBATICAL PROGRAM LOGIC MODEL *



*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 San Diego (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)
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Percentage who “Agree” or “Strongly Agree” with statement

	ALL PRE n=19	ALL POST n=19
Confidence		
I have confidence in my leadership abilities.	4.63	4.74
I have confidence in the leadership capacity of my board of directors.	3.89	4.11
I have confidence in the leadership capacity of my staff.	4.21	4.21
Effectiveness		
I work effectively with our board of directors.	4.53	4.47
I work effectively with our staff.	4.58	4.42
I can effectively lead capacity building in my organization.	4.05	4.21
I can effectively create a stronger organizational infrastructure in my organization.	4.06	4.33
I can effectively increase my nonprofit’s ability to have a positive impact in the communities we serve.	4.44	4.67
I can effectively enhance my nonprofit’s impact on the nonprofit sector as a whole.	4.17	4.39
Reflection and Commitment		
I take time to reflect upon my professional identity.	3.42	4.32
I take time to reflect upon what is important to me in my work.	3.74	4.74
I hope to work in the nonprofit sector for the balance of my career.	4.44	4.50
I am proud to be a nonprofit professional.	4.74	4.84
I am committed to my organization.	4.79	4.89
I am committed to the nonprofit sector.	4.58	4.58

	ALL PRE n=19	ALL POST n=19
Well-Being		
I am satisfied with my physical health and well-being.	3.00	3.84
I am satisfied with my mental health and well-being.	3.61	4.28
I maintain a satisfying work/life balance. ¹³	2.88	4.00
I feel energetic about my job.	3.89	4.58
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.	4.32	4.42
I anticipate that my sabbatical will recharge me.	4.79	4.63
I anticipate that my sabbatical will enhance my leadership capacity.	4.53	4.68
I anticipate that my sabbatical will enhance my staff's leadership capacity.	4.95	4.58
I anticipate that my sabbatical will enhance my board of director's leadership capacity.	4.21	4.00

¹³ One ED in Year 2 did not answer this question in the post survey (n=18).

APPENDIX E: STAFF AND BOARD SURVEY RESULTS¹⁴

Strongly Disagree (1)	Disagree (2)	Neither Agree nor Disagree (3)	Agree (4)	Strongly Agree (5)
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Percentage of Respondents who “Agree” or “Strongly Agree” with the following statements using the scale below (if no footnote, asked all five years)

	Mean
I worked more as part of a team during the sabbatical. ¹⁵ (staff only, n=59)	4.12
I had greater influence on decisions during the sabbatical. ¹⁵ (staff only, n=59)	4.07
I had more positive relationships with others in the organization during the sabbatical. ¹⁵ (staff only, n=59)	3.80
The ED appeared to be more rested and rejuvenated post-sabbatical. (board/staff, n=179)	4.43
The ED demonstrates a better work/life balance post-sabbatical. (board/staff, n=164)	3.84
The ED demonstrates more confidence in the job post-sabbatical. (board/staff, n=175)	3.67
The Executive Director delegates more responsibilities post sabbatical. ¹⁵ (board/staff, n=102)	3.89
The Executive Director focuses more on the big picture post sabbatical. ¹⁵ (board/staff, n=104)	3.87
The board of directors of the organization is more effective post-sabbatical. (board/staff, n=156)	3.47
Staff members of the organization are more effective post-sabbatical. (board/staff, n=170)	3.99
My role/job has been substantially restructured as a result of the sabbatical. ¹⁶ (staff only, n=43)	2.51
My role has changed post-sabbatical. ¹⁵ (staff only, n=59)	3.51
I have greater decision-making authority post-sabbatical. ¹⁶ (staff only, n=100)	3.11
I have more leadership opportunities post-sabbatical. ¹⁷ (staff only, n=83)	3.35
I am more effective in my organizational role post-sabbatical. (staff only, n=99)	3.56

¹⁴ 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.

¹⁵ Asked in Year 3, 4 and 5; not asked in Year 1 and Year 2.

¹⁶ Asked in Year 1 and Year 2; not asked in Year 3, 4, or 5.

I have more productive relationships with others in my organization as a result of the sabbatical. ¹⁵ (staff only, n=41)	3.49
I have more positive relationships with others in the organization post-sabbatical. ¹⁵ (staff only, n=59)	3.80
I plan to stay in my job longer than I had previously projected as a result of the sabbatical. ¹⁶ (staff only, n=38)	2.74
I feel more committed to the organization post-sabbatical. ¹⁵ (staff only, n=58)	3.60
I gained new skills and knowledge that will serve me in the future as a result of the sabbatical. ¹⁵ (staff only, n=59)	3.85
I have a greater role in fundraising post-sabbatical. ¹⁷ (board only, n=81)	2.94
I am working more closely with the staff post-sabbatical. ¹⁷ (board only, n=81)	3.25
I am more prepared to engage in planning for the future post-sabbatical (succession planning, strategic planning, etc.). ¹⁷ (board only, n=81)	3.59
I am more a more effective board member post-sabbatical. ¹⁷ (board only, n=81)	3.49
I have a greater perspective about the organization post-sabbatical. (board/staff, n=140)	3.89
Lessons from the sabbatical impacted organizational planning. (board/staff, n=169)	3.88
The sabbatical redirected thinking on organizational transition and succession planning. (board/staff, n=167)	3.92
There are more opportunities for staff professional development as a result of the sabbatical. (board/staff, n=171)	3.82
New leadership capacity was built within the organization as a result of the sabbatical. (board/staff, n=179)	4.10
The application process was a useful way to prepare the organization for the sabbatical. (board/staff, n=114)	3.68
The length of the sabbatical was appropriate. (board/staff, n=178)	3.97
The sabbatical financial support was sufficient. (board/staff, n=125)	3.89
The consulting support for the organization in the executive director's absence was appropriate. (board/staff, n=116)	3.87
The process established for the ED to re-enter the organization after the sabbatical was appropriate. (board/staff, n=154)	3.82

¹⁷ Asked in Year 2, 3, 4 and 5; not asked in Year 1.

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