

Creative Disruption

**Sabbaticals for Capacity Building and Leadership Development
In the Nonprofit Sector**

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“The passion and joy of being in the NPO world, the commitment and the fortitude of do-gooders is such that it is all but impossible not to care so much about something without the price of burden...I have always loved the family first, but the work gets most of the time. So a sabbatical, to help get back to center, to restore and invigorate, is life saving. That makes for better leaders in the long run, and that makes the community, to whom one is pledged as a servant, a most honorable obligation, the ultimate beneficiary.”

-- A sabbatical awardee

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Executive Summary

The Importance of Sabbaticals

The stresses and demands of leadership make intellectual, emotional, creative, and even physical burnout all too common among nonprofit executives. One of the most effective and cost efficient ways to prevent this from happening is the sabbatical. A “time away” from the daily grind of high-pressure work routines can rejuvenate body, mind, and spirit. It can also bring an executive to new perceptions and re-framings that ultimately create greater leadership capacity in his or her organization.

Yet, the idea of granting an executive a sabbatical rarely comes up for consideration. Traditional notions that a leader who enjoys a taste freedom from the job will never return, or that an extended—if temporary—vacancy in the executive director’s (ED) chair will create chaotic disruption in an organization keep proposals for sabbaticals well off the table. The typical refrain from a program director: “I could never go to my board with this...”

Exposing the Myths

We now have powerful evidence that these concerns are unfounded. In fact, EDs who go on sabbatical are more likely to *extend* their tenure, not cut it short. And rather than causing chaos, disruptions in an organization’s day-to-day affairs may become *creative*. Perhaps most importantly, a sabbatical can be a relatively inexpensive but highly productive capacity-building tool that yields measurable results. To explore these results, five philanthropic organizations that provide sabbaticals to nonprofit leaders commissioned this study. What it reveals is both surprising and hopeful.

Summary of Findings

Outcomes for awardees

A survey was sent to 126 sabbatical awardees whose names were provided by the five sponsoring foundations. Sixty-one completed surveys were returned.

A large majority of survey respondents reported experiencing positive personal impacts, both tangible and intangible, resulting from their sabbaticals. The survey also shows that the majority of leaders maintained these individual changes some months or years after the sabbatical. The changes included:

- Improved work/life balance (81%)¹
- Better connections with family (81%)
- Better physical health (76%)
- Greater confidence in doing the job (87%)
- More productive relationships with supervisees (83%)
- Better relationship with community and community partners (87%)

¹ Survey respondents were given the option of checking “Not applicable/No improvement was needed” for each of these possible sabbatical impacts. The data is reported here for those among the 61 survey respondents who did not choose that response.

Sabbaticals and Leadership Transition

- Sabbaticals do not contribute significantly to leaders leaving their organizations. Seventy-seven percent of the survey takers are still with the same organization. This finding is borne out through interviews with funders, awardees, and local evaluations.
- Those who did leave report the sabbatical was not the cause. Rather, the “time out of time” experience gave the leader who was already thinking of leaving the space to reflect upon the “right time” to depart and how to prepare for a healthy transition.
- A sabbatical can give the organization—particularly its leader and board—insights into what a future and as yet unplanned leadership transition may hold. Many organizations create succession plans as a result of the sabbatical experience.

Outcomes for organizations

By providing leave for their leaders, the sabbatical recipients’ organizations are strengthened in the following ways:

- The leader typically delegates some duties to other top managers. The majority report restructuring management teams as a result of the sabbatical.
- The executive director shares decision-making with other managers at a greater level after the sabbatical.
- Many leaders return with an expanded vision for the work of the organization. These are two typical descriptions by respondents: “More global perspective. Less time on what now seem to be minor issues.” “The vision has always been in place, but the vision has blossomed since my leave and upon my return.”
- Executive directors report that managers who acted as interims in their absence are better skilled in their positions post-sabbatical.
- Interim leaders experience executive leadership firsthand, enabling them to appreciate the position more keenly and clarify whether or not this role is for them.
- There is the potential for strengthening governance through sabbaticals. Sixty percent of the survey respondents said their board of directors is more effective as a result of the planning and learning that surrounded the sabbatical process.
- Collaboration emerges among awardees. More than two thirds report they are now working collaboratively with other awardees whom they met at foundation-sponsored convenings.
- Interim leaders need to receive enough pre-planning support and ongoing support during their role as leader in order to succeed and not burn out from added responsibilities.
- More post-sabbatical support when the awardee reentered the organization—sample protocols, coaching, facilitation of debriefing meetings—was frequently reported to help all parties take fuller advantage of their sabbatical learnings.

Sabbatical Process Itself

- An orientation, coaching, or convening with former awardees and tips for planning *before* they leave will help leaders make the most of their sabbaticals.
- Respondents reported that the optimal amount of time for a sabbatical is three to four months. Less than three months is not enough time to reap the benefits of rejuvenation. More than four months can be a hardship on the organization.
- A clean break from the organization is necessary, if awardees are to reap the full benefits of the sabbatical. Eighty percent of the 61 survey respondents said they avoided contacting their organization during the sabbatical. Of those who did contact their organization, the majority did so very infrequently—less than three times. Case studies and interviews with funders underscore that separation from work is a key contributor to successful sabbaticals at the individual level.
- In addition to having no contacts with agency staff, removing oneself from the community in which one works and lives—the home community for at least one month is an important contributing factor to the success of the sabbatical, as reported in the surveys and by funders.
- Convenings of sabbatical program alumni encourages collaboration among attendees—sometimes unusual or cross-field collaborations.

For Foundations

- Without a “stamp of approval” and financial support from a foundation, a nonprofit leader may feel too guilty to take a sabbatical, or the board may not grant leave time.
- Most of the positive outcomes from a sabbatical program are achievable with a modest foundation investment.
- Foundations receive indirect, but important benefits from sabbatical programs, such as building trusting relationships with leaders and receiving deeper perspective on community needs or feedback regarding the foundation’s impact on the community.

Part I: Developing Leadership

Why Sabbaticals?

What does extended leave time from the day-to-day stress in nonprofit settings accomplish for executive directors, community organizers, and other leaders in the sector? Plenty.

The results of our study demonstrate that sabbaticals are an important tool for leadership development and retention in the nonprofit sector. Sabbaticals allow leaders to get away from their work routines for a respite that leads to rejuvenation of the body, mind, and spirit. The rejuvenated person gains new perspectives on his or her leadership, organization, and field of practice. The new insights and framings can lead to changes in lifestyle and new approaches to leadership. They can also translate into a new organizational vision and more effective programs. And in some cases, they result in changes in the way the organization relates to its broader community and field of practice. Powerful stuff in return for a few months’ time off.

The sabbatical has long proven a powerful refresher of mind and spirit in academia and religious communities. Non-work release time has the same impact for leaders in nonprofits. A sabbatical is also a straightforward, relatively inexpensive leadership development and capacity building tool that offers increasingly measurable results.

A handful of foundations, family foundations primarily, have been providing sabbaticals to selected leaders among their grantees for some time. Five of these foundations—the Barr Foundation (Boston), The Durfee Foundation (Los Angeles), the Virginia G. Piper Charitable Trust (Phoenix), and the Rasmuson Foundation (Alaska), along with the Alston/Bannerman Fellowship Program (national)—joined together to conduct a preliminary meta-study of the results of their sabbatical programs. Although all of these foundations were experiencing good results either anecdotally or through local evaluation findings, they had questions about how they might improve their programs and hoped the answers could be informed by a comparative study. As a result, they jointly commissioned this survey in order to understand which results from their sabbatical programs represented consistent findings and which practices hold the most promise.

Creative Disruption

We chose the title “Creative Disruption” for this study to highlight the fact that sabbaticals of some months’ duration are disruptive to the work and life routines of nonprofit leaders and to the leadership and management patterns of their organizations. The leader’s sense of disruption can spark creativity, creating new perspective on his or her life’s work, organization, and leadership style. The organization’s disruption, caused by the absence of its long-term leader, the need for other staff to take on new responsibilities, and by trustees or board members examining their roles from a new perspective, can also prove productive.

New management structures frequently emerge post-sabbatical, alongside a fresh vision or an affirmation of programmatic direction. Systems for communication and decision-making often change, as well. A contained, lovingly held disruption of deeply ingrained

patterns of governance and management can renew an organization while the sabbatical awardee is off on his or her own renewal journey.

However, without the outside support and affirmation provided by a foundation’s sabbatical award, the majority of leaders will not, on their own, take extended time away from their organizations—as taking care of oneself is usually not a high priority in the nonprofit sector. And most organizations cannot afford this gift of time on their own.

This report documents how a modest foundation investment in a sabbatical program can make a positive impact on nonprofit leaders and the organizations in which they work.

Rejuvenating Leaders

The experiences of the sabbatical takers who were surveyed and interviewed for this study² are highly positive. Many said it was a once in a lifetime experience or “one of the highlights” of their lives. Rejuvenation is the overall impact most frequently reported.

Significant time away from daily routines is the major contributing factor to this rejuvenation and its ripple effects for the awardee’s organization. Rejuvenation affects health and improves relationships. A rejuvenated body, mind, and soul can lead to inspired vision, changes in leadership style, and clarity about next steps for life and work. Or the outcome may be an affirmation that things are actually all right as they are. The majority of survey takers reported that many of these positive shifts remained with them one year or more, post-sabbatical.

A majority of the awardees studied set out to make their sabbaticals “the experience of a lifetime,” as some described it. Their personal drive to better themselves and increase their organizations’ community impacts, paired with the extended time away from job and home to have space to reflect on how to do so, produced the rejuvenating outcomes found in this study. The critical contribution the awarding foundations make is using their standing in their communities to create a culture of “permission” for a leader and for an organization’s board of directors to support sabbaticals. For leaders and their organizations, the valuable effects of this one simple act of encouraging rest and reflection are many. As one awardee said:

“The sabbatical was life-changing for me personally, and really good for my organization. I cannot say enough about the profundity of its impact.”

Importantly, the foundations also provide a “template” or set of guidelines for awardees on how to maximize the benefits of their sabbaticals. The five foundations provide different forms of support on how to use the template, e.g., a sabbatical orientation session for awardees, offers of coaching, or convenings for the backup leaders. Awardees varied widely as to which supports they took advantage of. The results of this study

² A description of the participating foundations and the study methodology, including demographics of survey respondents, are found in the second part of this report, which contains supporting data for the findings and for the recommendations outlined in this section.

indicate no one form of support correlated with any particular sabbatical impact. Rather, it seems encouragement from a respected funder to take a leave of absence, along with some upfront guidance on how to make the most of the experience, is sufficient to generate significant positive impacts both for the awardee and his or her organization.

Sabbaticals—Creative Disruption—Capacity Building

Growth—both in people and organizations—is often the result of being jarred out of a comfort zone. As leaders and organizations navigate the aftermath of the disruption caused by the absence of a leader, they find themselves in change management mode. The change manifests as the majority of leaders return and shift more responsibility to their management teams. There is more delegation, increased sharing of decision-making, and general bench-strengthening. Sabbatical awardees and their interims alike report growth or change in their vision for their organizations as a result of taking a sabbatical, with a substantial number, including interims, also reporting that their new vision is eventually implemented.

Boards of directors become more engaged during leaders’ absences and get to know their interims and their organizations’ day-to-day workings better. Both awardees and interims report improved governance as a result of sabbaticals. The continued peer networking of sabbatical alumni allows for continued sharing of ideas, management changes, and learning. The report goes into more detail on these and other nonprofit organizational capacities that can result from sabbaticals.

Demographic profile of the 61 awardees responding to the study survey

It should be noted that some of this study’s data on sabbaticals’ impact are from surveys received from a non-random sample of the 126 leaders who received sabbatical awards in the years 2003 to 2007.

The 61 sabbatical awardees who returned completed surveys—48% of the 126 to whom it was sent—are substantially diverse with regard to gender, race, age, and length of nonprofit service. The group’s gender representation is split down the middle. Fifty-six percent are people of color.

As might be expected, the awards, on average, went to nonprofit leaders with greater seniority as well as solid tenure in their jobs and in the nonprofit sector. The median age is 56, with 74% older than 50. The median number of years an ED has occupied his or her position at the time of the award is 12, with 69% at nine years or more. Median number of years in the nonprofit sector is 22.

Gender

Response	Count	Percent
Male	30	49.2%
Female	30	49.2%
Decline to state	1	1.6%

Age

	Count	Percent
less than 40 years	1	1.6
40-49 years	15	24.6
50-59 years	32	52.5
60-69 years	12	19.7
70+ years	1	1.6
Total	61	100.0

Mean	54.72
Median	56.00
Minimum	38
Maximum	74
Range	36

Race/Ethnicity

Response	Count	Percent
African American	8	13.1%
Asian/Pacific Islander	7	11.5%
Latino/a	14	23.0%
Middle Eastern	0	0.0%
Native American	2	3.3%
White/Anglo	28	45.9%
Decline to state	1	1.6%
Other	1	1.6%

Number of years in role when awarded sabbatical

	Count	Percent
Less than 2 years	2	3.3
2-5 years	7	11.5
6-8 years	10	16.4
9-13 years	17	27.9
14-20 years	19	31.1
21+ years	6	9.8
Total	61	100.0

Mean	12.88
Median	12.00
Minimum	1
Maximum	49
Range	48

Total number of years in nonprofit sector as a paid staff member

Mean	22.04
Median	22.00
Minimum	1
Maximum	39
Range	38

What the sabbatical awardee achieves

As the case studies at the end of this report demonstrate, many awardees achieve far more than a rejuvenated spirit. Tamara Woodbury’s time away enabled her to re-envision Girl Scouting from the roots up—eventually influencing the field at the national level. Maria Elena Letona’s sabbatical laid the ground work for a healthy leadership transition three years after her sabbatical. Sandra Bryant’s time away enabled her to see and feel that she was still in the right place after 16 years of leadership and that she had more to contribute over the coming years.

Feedback from awardees and funders points to two critical factors that strengthen sabbaticals:

- Planning for the sabbatical ahead of time
- Removing oneself as completely as possible from one’s organization and its work for a minimum of three months

As reported in interviews with funders and awardees, it is important for those who live and work in the same community to take a trip away from the community—because of its associations with the workplace—for at least a month. Separation from day-to-day work life, and even from home and community routines, is essential to create the uninterrupted time for reflection that makes for a successful sabbatical.

As the chart below shows, the sabbatical significantly improved indicators of overall well being such as work/life balance, better connections with family, and better physical health.

At the end of my sabbatical, I had:

	1- Not At All	2	3	4-Very Much So	Not Applicable /No improvement was needed
Improved work/life balance	1.7% (1)	13.6% (8)	40.7% (24)	40.7% (24)	3.4% (2)
Better connections with my family	1.6% (1)	14.8% (9)	19.7% (12)	42.6% (26)	21.3% (13)
Better physical health	1.6% (1)	19.7% (12)	34.4% (21)	34.4% (21)	9.8% (6)

Importantly, some months or years³ after the end of their sabbaticals, 46 of 58 (79%) respondents were still reporting improved work/life balance and 45 of 51 (88%) respondents were reporting better connections with family. While the sample is small, these results point to a potentially powerful outcome of sabbatical programs—three months of leave time from work can provide enough pattern and behavior change for some behaviors to stick, even for some time after the sabbatical.

Likewise, awardees gain other insights that lead to changes in their perspective or behaviors that become permanent for many leaders, such as the following:

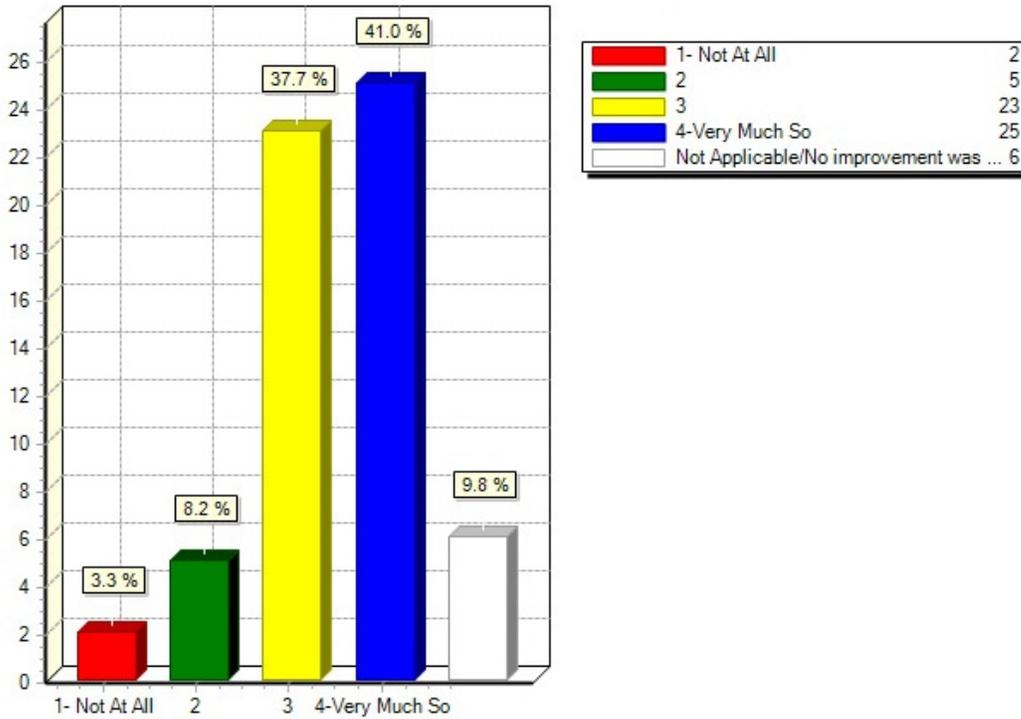
Greater Confidence

As the graph below shows, 48 of 55 respondents gained increased confidence in doing their jobs after their sabbaticals. This finding is consistent with data reported in an earlier evaluation of the Barr Fellows Program. Greater confidence enables leaders to free themselves to do higher level work in their fields at the policy and advocacy levels, to raise funds more effectively and to think out of the box more freely.⁴

³ Some of the respondents completed the survey several months after returning from sabbatical. Others had taken sabbaticals as much as five years earlier.

⁴ Confidence indicators come from Barr Fellows Program evaluation (year two post-sabbatical evaluation for the 2005 cohort).

At the end of my sabbatical, I had greater confidence in doing my job



Greater Job Longevity

One of the most common concerns about providing sabbaticals is that so much time away will tempt executive directors to vacate their often burdensome position. In fact, the data points in the opposite direction. Sabbaticals often reconnect these remarkable people with the reasons they chose their work and leadership positions to begin with. When asked to report on whether their sabbatical had influenced a “decision that I would stay in my job longer than I had previously projected,” a third (20 awardees reporting) said that this was true or very much true for them.

Saundra Bryant (see case study) speaks eloquently about not knowing, after 17 years of leadership at All Peoples Christian Center, whether she was still the right match for the organization. This was the key question she reflected upon during her three month leave. The end result was a resounding, “Yes!” not only to remaining, but also to re-committing her spirit and energy to the organization and the community it serves for some years to come.

Conversely, only eight respondents (13%) said that at the end of their sabbaticals they had made a decision to leave their position in the next one-to-three years. The majority of those who decided to leave stated that their transitions were better planned and healthier as a result of having had time for reflection.⁵ Maria Elena Letona’s case study is the story of a remarkably healthy transition three years after its seeds had been planted during her

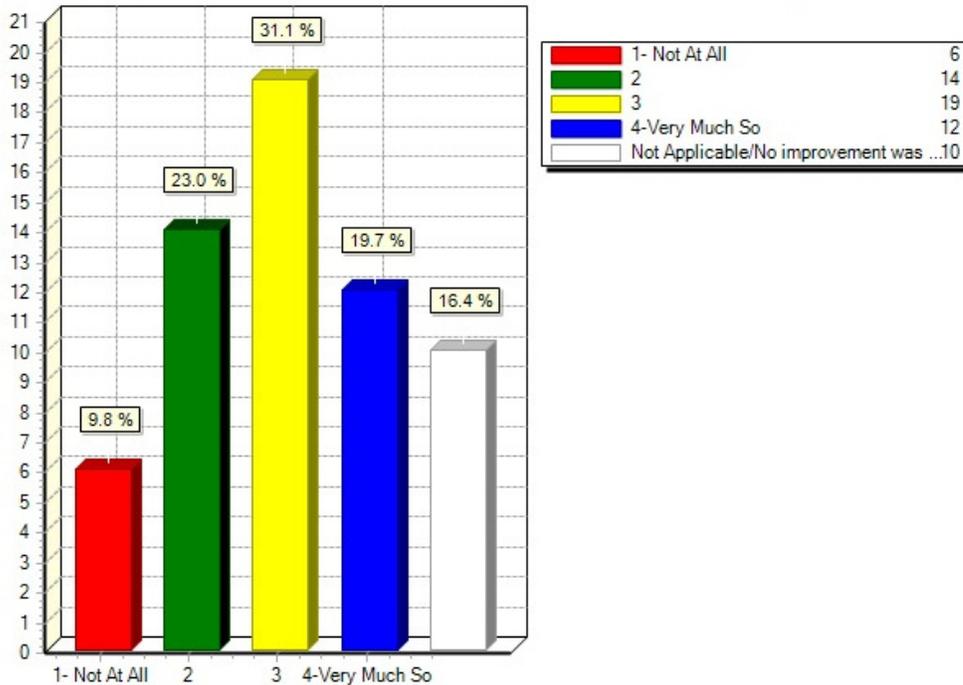
⁵ Barr Fellows evaluation of their 2005 cohort of awardees which included the awardees and funder.

sabbatical. See the section on succession planning for more elaboration of succession planning and leadership transition as they relate to sabbatical programs.

New Vision

Some leaders find rejuvenation and reflection either help crystallize an existing vision for their organizations or create a new one. Of the 61 respondents, 45 (74%) shifted their vision in some way, with 12 of these reporting, “Very much so.”

At the end of my sabbatical, I had a changed vision for the organization and its mission



Among sabbatical takers are farm-worker organizers who have completely reorganized their approach to their mission; a museum leader who was planning on departing but whose new vision for a museum program that related to the large immigrant community in his city brought him new energy for the job; and a leader of a community-based program who brought back a vision of crossing boundaries and building collaborations with other community groups rather than competing with them for a larger piece of the pie. Tamara Woodbury’s story (see case study) speaks directly to the power of a well-planned sabbatical to provide the respite for expansive, creative thinking that is simply not possible in the day-to-day operations of a nonprofit organization.

Inspiration and expansive thinking are important elements of the rejuvenation so many sabbatical takers report. This renewal has led to people remaining in their jobs when they thought they had completed them. It can energize the staff and board, and sometimes that energy can flow out to the larger field of connected service providers.

Of the 45 who said that their sabbatical had some influence on their vision for their agency, 25 report success in implementing their new perspectives.

When asked to comment on what is being implemented, awardees said:

“Part of the vision has been to cultivate a culture in which everyone, not just the kids we work with, but everyone involved with the organization is a constituent, and the mission includes enrichment, nourishment, and inspiration for all. Regarding the program, we are expanding in depth and breadth and integrating more social activism.”

“Yes, the vision has manifested itself in a broad, long-term project that I hope will have a measurable impact on our industry and the broadened community it serves.”

“We’re moving from a shelter-based system to a housing-based system. It is a cultural change and a restructuring of our basic services. It remains a work in progress, but we have been able to document [that] progress.”

Better Relationships with Staff, Board, Funders, and Community

Although improvements in personal well-being indicators are more frequently reported, sabbatical awardees also report gains in their relationships with supervisees, funders, constituents, and community.

At the end of my sabbatical, I had:

	1- Not At All	2	3	4-Very Much So	Not Applicable/No improvement was needed
More productive relationships with my supervisees	8.2% (5)	6.6% (4)	47.5% (29)	23.0% (14)	14.8% (9)
A better partnership with the board of directors	6.6% (4)	19.7% (12)	34.4% (21)	18.0% (11)	21.3% (13)
Better relationships with the people our nonprofit serves (clients, constituents, etc.)	1.7% (1)	15.0% (9)	35.0% (21)	23.3% (14)	25.0% (15)
Better relationships with the community/community partners	3.3% (2)	6.6% (4)	34.4% (21)	32.8% (20)	23.0% (14)
Better relationships with the organization's funders	1.6% (1)	13.1% (8)	37.7% (23)	24.6% (15)	23.0% (14)

Relationships with supervisees improved for 43 respondents. In addition, 41 have better relationships with the community and community partners; 38 report better relationships with their organization’s funders, and 35 experienced better relationships with the constituents of their organization. Thirty-two experienced improved partnerships with their boards.

The next section, on organizational shifts, describes in more detail why some of these relationships improved. The outcome could be attributed to a mix of influences: a change of perspective gained by awardees, new perspectives gained by others in the absence of the awardee, and/or boards and staff stepping up to new responsibilities during the awardee’s absence.

What the Sabbatical Achieves for the Organization

Profile of survey respondents’ organizations

Nearly a quarter of the survey respondents worked in human service (non-healthcare) organizations. Another 22% were community organizers; the latter is the target group for the Alston/Bannerman program.

The percentage of the awardees’ organizations in each of the budget size and staff size categories matches reasonably well with the percentages for the nonprofit sector as a whole. For instance, 59% of the organizations have 20 or fewer staff, and 78% have budgets of \$3,000,000 or less.

Organization’s primary field of service

Response	Count	Percent
Human services (non-healthcare)	14	23.3%
Health/mental health	7	11.7%
Arts/culture	7	11.7%
Environment	5	8.3%
Public benefit/advocacy	0	0.0%
Education	3	5.0%
International/foreign affairs	0	0.0%
Religious/spiritual	0	0.0%
Animal welfare	0	0.0%
Labor/workers rights	4	6.7%
Immigration	1	1.7%
Community organizing/community empowerment	13	21.7%
Other	6	10.0%

Paid Staff Size

Response	Count	Percent
1-4 staff members	10	16.4%
5-10 staff members	11	18.0%
11-20 staff members	15	24.6%
21-50 staff members	12	19.7%
51-100 staff members	6	9.8%
over 100 staff members	7	11.5%

Operating Budget

Response	Count	Percent
\$0-\$100,000	4	6.6%
\$100,001-\$500,000	14	23.0%
\$500,001-\$1,000,000	12	19.7%
\$1,000,001-\$3,000,000	18	29.5%
\$3,000,001-\$7,500,000	7	11.5%
over \$7,500,000	6	9.8%

Shared Leadership

One of the most interesting results of the survey is how many leaders, upon returning from a sabbatical, delegate and share more decision-making. The responses illustrated in the five graphs in this section of the report show that as a result of the planning and learning surrounding a sabbatical, organizations changed so that post-sabbatical their directors:

- Shared a greater amount of decision-making with managers (85%)
- Was more comfortable delegating major responsibilities (84%)
- Felt that the managers in their organization had become more skilled in their positions (83%)
- Restructured the management team (69%)
- Restructured their job and delegated some of their duties to others (64%)
- Reported that the board of directors became more effective (60%)

These figures are consistent with previous evaluations conducted earlier by the same programs. The figures speak to the organizational *shifts* caused by the creative disruption of the sabbatical overall—its interlocking impact on interim leaders and other managers, board members, and the executive leader.

Here are some typical responses by participants regarding their new perspective on sharing responsibilities:

“New CEO who reports directly to the board instead of through me. Senior Management Team in place. I’ve been freed up to provide long range vision and also serve as a broader community member.”

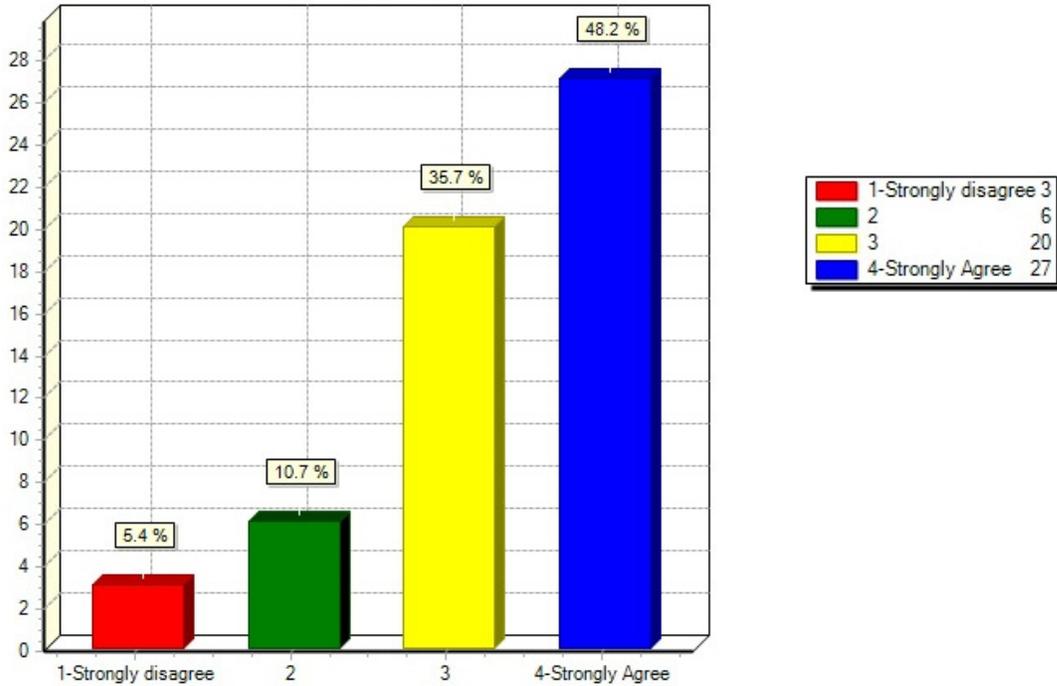
“I used some of the funds to do an Appreciative Inquiry retreat for [the] senior team and others in leadership roles so power sharing and inclusiveness could be modeled and part of our culture.”

“My desire has always been that the organization be eventually run by the women we serve. Since my return, I’ve experienced the staff being more confident with their input/decisions/assessments.”

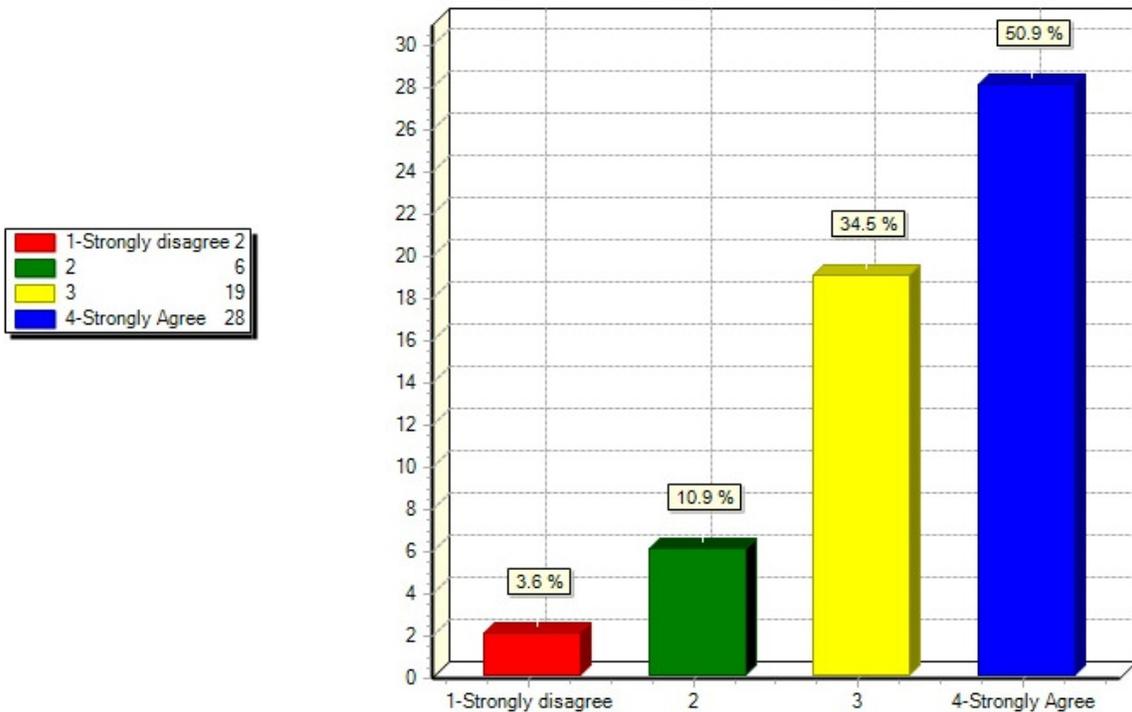
“The organization has created a more shared approach to decision making and clearer lines of accountability.”

As a result of the planning and learning surrounding my sabbatical, I would say that the organization has changed in the following way:

I am more comfortable delegating major responsibilities to my supervisees



I share a greater amount of my decision-making with managers in the organization



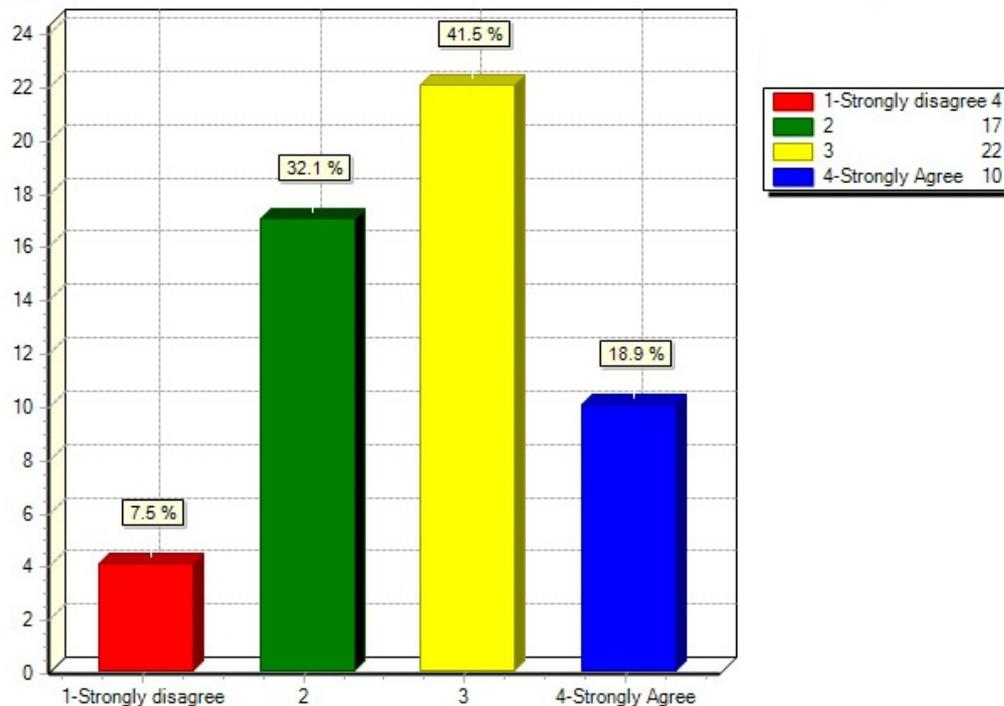
Sixty-one staff who served as interim leaders for the sabbatical awardees were sent surveys regarding their experiences. Thirty of them responded to the survey. Like the awardees, they report greater shared leadership and executive delegation post-sabbatical, as follows:

- Report that their job has been restructured and they continue to be responsible for some duties they performed as an interim leader (60%)
- Agree that managers are better skilled in positions (77%)
- Agree that there is more delegation (77%)
- Report that they have a greater sphere of decision-making authority (67%)
- Report that the management team has been restructured (43%)

Governance Improves

Anecdotally, there exists evidence that sabbaticals can also improve governance in an organization. In the survey, 60% of the awardees and 53% of interim leaders report that the board of directors is more effective, again as a result of the planning and learning surrounding the sabbatical. Seventy-five percent of the interims said they had a more productive relationship with the board of directors as a result of working more closely with them.

As a result of the planning and learning surrounding my sabbatical, the board of directors is more effective



Overall, from previous local studies of sabbatical programs and from this survey’s findings, it appears that governance could be another organizational arena that may shift during creative disruption. Integrating board members more fully into the orientation,

planning for the sabbatical, and holding reentry meetings (as some programs already do) may increase the probability of that shift.

Succession Planning

The survey results indicate that sabbaticals contribute to organizations engaging in succession planning. Nineteen of the awardees (32%) report that as a result of the planning and learning surrounding their sabbaticals, they now have succession plans in place for themselves. Another 11 organizations report that they are in discussions about or are in the early stages of, a succession planning process. And nine report putting succession plans in place for some or all of the organization’s managers. Only three respondents said they had plans in place before their sabbatical awards.

Nonprofits in general have remained resistant to succession planning, as boards fear the loss of good leaders, or leaders worry they will be sending the wrong message to their boards, staff, and funders. However, the culture regarding these barriers is slowly shifting. Sabbaticals force a form of succession planning—preparing managers to lead the agency while the leader is on a three-month leave. After experiencing the many benefits of this bench strengthening, sabbatical awardees and their organizations are ready to move into larger scale succession planning.

More about Succession

As noted above, a small number of awardees have left their organizations. More often than not, the sabbatical helped support a positive, well-planned transition. In some cases the sabbatical helped make clear to the organization that the person who acted as the interim executive director was the right choice. One group did a national search, but hired the deputy director who had acted as the interim because they had seen her leadership in action. Another organization had the opposite experience, where both the awardee and the interim mutually decided that the interim was not the right fit to succeed. The sabbatical process, in essence, allowed this organization to bench test a candidate for a new role. Without this experience, the group may have replaced the awardee when he left two years post-sabbatical with the interim and then run aground.

Deborah Ching, the former executive director of Chinatown Service Center (CSC), Los Angeles, shared her story of transition. Deborah went “full throttle for too long.” While the sabbatical reenergized her for a time, it also gave her perspective that it was time to leave. She says:

“The sabbatical strengthened CSC’s management team. Each member had to step up to greater responsibilities during my sabbatical, and the interim leader gained valuable leadership experience. The sabbatical allowed a “test run” for my departure, demonstrating to the staff and the Board that CSC would not fall apart without me. It was a stretch experience for all of us. It left the board and staff feeling stronger and more capable than they realized.”

Chevy Humphrey is the president and CEO of Arizona Science. Chevy was a sabbatical awardee when she worked as the organization’s executive vice president. (The Piper

Trust provides sabbaticals at both the executive and other leadership levels within nonprofits.) Chevy’s organization used the sabbatical as a way for her, as future leader, to prepare personally for stepping up to the CEO position. Prior to the sabbatical, the organization also offered professional training for key staff, which was a “huge plus for them and the organization.” Chevy writes:

“The sabbatical played a huge role in the transition process. It prepared me both personally and professionally for this new undertaking, and I was able to prepare my supervisees through professional development to take on more of my COO responsibilities and feel confident that they could handle things during my leave.”

Organizations can use sabbaticals in many ways beyond creating a respite for the awardee—to support leadership from within, try out interim leadership, enable boards to gain greater perspective, and strengthen the bench. They may also experience unintentional ripple effects from sabbaticals, but when organizations are intentional about strengthening, testing, or experimenting with leadership during the absence of the executive, they gain even more.

Connection and Collaboration

Convening alumni from the sabbatical cohorts has emerged as a critical post-sabbatical element, or as one survey taker responded, “One of the biggest benefits of the sabbatical.” Eighty-five percent of awardees report having attended foundation-sponsored formal gatherings, and 78% have attended informal gatherings with other awardees. Eighty percent report that they have developed a personal and/or professional bond with other awardees. Here are two typical responses:

“I have informal lunches with other awardees (all of whom I did not know before) to bounce ideas off of them and to share information.”

“This was probably one of the greatest outcomes. I am so much more involved with my peers at other agencies now.”

Alston-Bannerman recently convened its awardees from all over the country for a celebration and to discuss and record lessons learned. Piper and Durfee have well-established alumni gatherings. Piper has been providing up to five awards per year since 2001 and has monthly or bimonthly meetings of their Fellows.

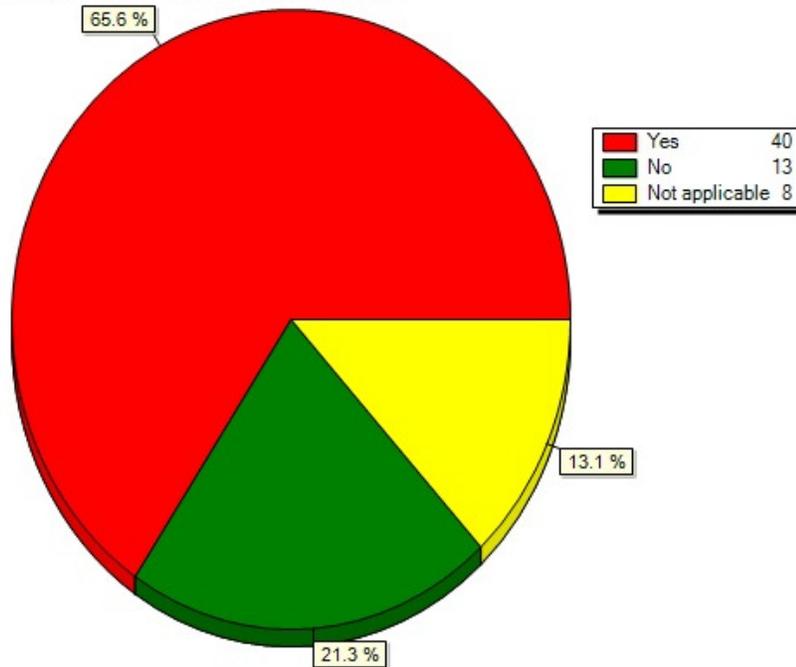
Peer learning circles have emerged organically from these frequent informal gatherings. The circles serve to broaden leaders’ knowledge of other nonprofit sectors and provide peer support. Barr holds formal retreats several times a year over three years for each sabbatical cohort and conducts an annual alumni gathering. While the Durfee alumni gatherings have changed over the years from less to more formal, the group has always resisted a set agenda or ‘learning’ and wants time to focus on making connections. This desire for less structure and more time for connection runs across the programs.

The most emergent aspect of convening awardees in such a way that they are able to build connections is that many go on to form collaborations. It is at this point where sabbaticals begin to influence cross-organizational or community impacts. As two awardees commented:

“There is greater cohesiveness among the awardees that translates into more work being done...collaboration...and services being provided across the City of Boston.”

“I have shifted my focus more to collaboration with other agencies to achieve common goals and development and have delegated day to day administration.”

If you do feel bonded with other leaders, has this led to any collaborative work or actions between/among your organizations?



New collaborations that can make on a community issue or geographic area may be an important ripple effect of sabbatical programs. The Barr Foundation in Boston is in the process of documenting connections, collaborations, and networks that emerge as a result of its Fellows Program.

Concluding Thoughts on Organizational Impacts

The absence of the leader for three months is the “creative disruptive” moment for the organization. Alston-Bannerman reports that one of the themes it has seen consistently throughout the 21 years of providing its program is that of “people coming back realizing they are not that indispensable, [and that] they don’t have to shoulder every

responsibility.” Donna Logan, the evaluator for the Rasmuson Foundation’s program concurs:

“A benefit for organizations is the realization that when the recipients leave the organization, the organization does not fall apart. They gain a keener appreciation of their staff’s abilities. This in turn builds confidence for the staff members.”

This big “ah ha” is the insight that others are most likely to experience as well—the board, staff, constituents. The leader is actually not indispensable. This one realization opens many interesting doors post-sabbatical for organizational development including delegation and more shared decision-making, board members stepping up, a change of perspective for the leader on how much task level management they should be handling, the concept that succession planning is healthy and does not imply the imminent departure of the leader.

The Interim Experience

Demographics of the Interim Leaders Responding to the Study Survey

The staff who stepped up to cover for the leaders on sabbatical are, unsurprisingly, younger than the awardees—median age of 44, versus 56—and have been in their jobs fewer years—median years of 6 versus 12. Gender split is the same for both groups as is racial diversity.

Gender

Response	Count	Percent
Male	14	46.7%
Female	16	53.3%

Age

	Count	Percent
less than 40 years	9	30.0
40-49 years	12	40.0
50-59 years	9	30.0
Total	30	100.0

Mean	44.33
Median	44.00
Minimum	29
Maximum	59
Range	30

Race/Ethnicity

Response	Count	Percent
African American	4	13.3%
Asian/Pacific Islander	3	10.0%
Latino/a	6	20.0%
Middle Eastern	0	0.0%
Native American	1	3.3%
White/Anglo	16	53.3%
Decline to state	0	0.0%
Other	2	6.7%

Role in organization when replaced sabbatical awardee as interim leader

Response	Count	Percent
Deputy Director	8	29.6%
Chief Operations Officer	5	18.5%
Chief Financial Officer	1	3.7%
Director of Programs	0	0.0%
Program Director	6	22.2%
Community Organizer	0	0.0%
Other	7	25.9%

Number of years in role

	Count	Percent
Less than 3 years	8	26.7
3-5 years	6	20.0
6-10 years	8	26.7
11-20 years	5	16.7
21+ years	2	6.7
Total	29	96.7
Missing	1	3.3
Total	30	100.0

Mean	7.89
Median	6.00
Minimum	1
Maximum	24
Range	23

Total number of years in nonprofit sector as paid staff member

	Count	Percent		
5 years or less	1	3.3		
6-10 years	6	20.0		
11-15 years	13	43.3		
16-20 years	3	10.0		
21-30 years	6	20.0		
31+ years	1	3.3		
Total	30	100.0		

Mean	15.92
Median	14.00
Minimum	3
Maximum	35
Range	33

In order to provide other staff with leadership experience, the foundation programs under study⁶ request or require that the organizations receiving their awards use internal staff to act as the interim leaders.

Overall, the experience for interims was positive. Ninety percent of the 30 interims report having enjoyed the experience, even though 83% of them reported “some” to “very much” stress.

Like the awardees, interims report that post-sabbatical their jobs have been restructured as follows:

- They include some of the duties previously performed by the executive director (83%).
- They have a greater sphere of decision-making authority (77%).
- Managers become better skilled in their positions (91%).
- The board of directors is more effective (80%).

They also concur with the awardees’ reports that some succession planning is underway within their organizations as a result of the sabbatical.

Fifty percent of respondents say that the interim leadership experience provided them with a new vision for the organization, and 80% of those (12 of 15) have been able to influence the organization to take on all or parts of their new vision.

“I was able to see more clearly how public education of the larger community and advocacy fit into our mission statement of providing services to formerly incarcerated women. Volunteers have always been a large part of our organization and the sabbatical helped me to see how much can be accomplished with volunteers.”

⁶ Except Alston-Bannerman which provides sabbaticals to community organizers, not to executive directors.

A small number of interims report the experience was seriously difficult. Some believe they were not prepared well enough in advance or that they carried two jobs instead of one for three months. Some did not feel prepared for the reentry of the leader.

Others chafed when a leader returned unchanged or did not listen to the experience of the interim and the other staff left behind. Given that the sabbatical experience is so overwhelmingly positive *for the awardees*, some of the learning for sabbatical programs may be found in the small number of interims who have a negative experience.

A minority experienced insights into dysfunction, either with the leader or with the organizational culture. The creative disruption stemming from the leader’s absence leads to revelations such as “The organization was at peace when she was gone.” Or “I was hoping that our ED would come back and be a little less ‘micromanagey’ and allow some of the leadership structures we put in place while he was gone to remain.”

A question some observers have is whether or not sabbatical programs help develop the next generation of leaders. Interestingly, while the interims in this study took on more decisions and responsibilities after the leaders returned—and often their jobs were restructured to reflect this, as cited in the previous section—it does not necessarily follow that these program directors, chief operating or financial officers, or others who filled the shoes of the awardee desire to become executive directors in their own right.

Again, while 90% of the 30 interim respondents enjoyed their interim experience, the impact on them varied tremendously, ranging from affirming a desire to become a leader on their own to confirming that they wish to remain in their current positions, as the following comments demonstrate:

“My experience affirmed my sense that I was meant to lead.”

“It was a powerful experience for me—I wouldn’t have been ready at that stage in my career to run a \$3 million nonprofit, even for a summer, if it wasn’t one I knew so well and [that] had such strong relationships and supports in place. It solidified my confidence in my abilities as a leader (as well as showing me all the things I still had to learn), and showed me how much I enjoyed the job, despite the stress and responsibilities. This reaffirmed my desire to stay in the sector long-term and to target future leadership positions in other organizations.”

Again, a small number reported difficulty with the role:

“It was reasonably painful with very little benefit.”

“It was not very comfortable. I had the role but lacked true authority to make changes.”

The career pathways of interim leaders may be “up” within the organization. However, very few interims have gone on to replace the executives participating in this study or in the earlier Barr evaluations, which have followed “where interims go.” So although there are many positive experiences and learnings for interim directors, there is no data indicating that they are more likely to become executive directors as a result.

Some of the findings call into question the strict rule of some sabbatical funders that organizations should use interims or interim teams from within the organization versus an external interim director.

As one interim wrote,

The ____ Program seems really committed to providing the Interim with the opportunity to take over the role of the ED...as good as that sounds in theory, it just means that I was doing my (very full-time) job of as deputy director and the (very full-time) job of executive director for three months with no help.”

For smaller organizations with only two or three staff members or for organizations that cannot off-load the interim’s work to other staff, the desired outcome of providing the interim with an opportunity to experience the executive director position from the inside-out may be outweighed by the increased stress on that person or organization. In these cases, it may be wiser to allow organizations to choose between an experienced outside interim and an internal interim leader.

It is clear that better prepared interims, working in organizations with healthy cultures, as well as leaders and board members who supported them in their role, all had an easier time. This finding may speak to reviewing selection practices to ensure that the organization is as ready as the awardee for the sabbatical. Different programs support the interims at different levels. Good orientation, support during the awardee’s leave, and assisting with the reentry process help make the experience more positive for interims.

Part II: Lessons for Philanthropy

What the Sabbatical Program Achieves for the Foundation

Staff at foundations funding sabbatical programs have recognized several key benefits for their foundations. Key among these are establishing deeper relationships with leaders of grantee organizations, building good will, and developing new insights by hearing leaders’ perspectives on issues with which the foundation grapples.

Trusting Relationships Built

Critical work for a foundation’s staff is to be in touch with the field of nonprofit practitioners in their grant-making area and to understand the field/geography from the grantee’s perspective. Because sabbaticals focus more intensively on the grantee/leader than do most grant programs, by the time a leader becomes an alumnus of the program, more often than not a trusting relationship has developed between him or her and the program officer. This relationship is the basis for feedback to the foundation, extension of reach, and goodwill.

Constructive Criticism

These strengthened relationships facilitate direct feedback from awardees to the foundation. For instance, staff at the Barr Foundation find that sabbatical alumni feel more empowered to critique the foundation in a constructive way and are more confident to do so than are other grantees. Getting this kind of honest feedback can be invaluable for foundation staff. The Durfee Foundation’s program began 12 years ago. In that time, they have developed long-term relationships that have resulted in nonprofit leaders who remain trusted advisors to the foundation years after they took their sabbaticals.

In addition, Durfee uses its sabbatical alumni as a brain trust to help in many aspects of its work. Alumni assist in developing new grant programs or in rethinking current ones. They are even helping the foundation with its upcoming 50th anniversary.

The benefit of the relational part of this grant-making is that it can also help foundation trustees put a face on the work of these organizations, which they would otherwise engage only as a disembodied set of issues couched in a request. Simply put, the organizations become more tangible.

Cross-field Insights

Sabbaticals are normally given to leaders working in different nonprofit fields across the areas of a foundation’s giving. Leaders from the arts world may be in a cohort with nonprofit housing developers, for example. At alumni gatherings in particular, foundation staff can see the interrelations among different funding areas better as they watch leaders interact and ask questions of each other.

Sometimes awardees are working with other nonprofits outside of the foundation’s giving area. This too can create opportunities for new insights. For example, the Barr Foundation does not fund community development corporations (CDCs) or the affordable housing field in general. Barr *does* fund environmental organizations. Because of what

However, Barr staff learned in listening to the exchanges among some environmental grantees that assist CDCs with green technologies, Barr has now decided to fund some CDCs for their environment-related work. It would not have done so without the knowledge gained through its sabbatical program.

Carrie Avery of the Durfee Foundation believes that the cross-sector work that happens in cohorts of sabbatical awardees has a positive impact on the nonprofit sector. “For those sabbatical programs that encourage ongoing contact among awardees,” she says, “sabbatical programs can facilitate leaders working together across sectors, building relationships that can advance policy for the sector as a whole.”

Good Practices in Supporting Sabbatical Programs

The following snapshot of recommended best practices for sabbatical award programs has emerged from interviews with staff at the five participating sabbatical programs and with their consultants and evaluators, from interviews with their sabbatical awardees, from surveys of their sabbatical awardees and interim leaders, and from a review of previous studies.

Key elements for consideration and design in a foundation program include:

- Financial support for the organization
- Continuity and good will of foundation program staff
- An adequate screening and selection process
 - Attention to the minimum budget and/or staff size an organization needs to function well in the absence of the executive
 - Other demographic considerations
- Guidelines on the length and shape of the sabbatical leave
- Guidance for the leader and for the organization on how to prepare for a successful sabbatical experience (including the possible use of consultants and coaches)
- Support for interim leaders during the leader’s absence
- Periodic convenings of awardees

Financial Support

All of the participating foundations in this study offer a stipend ranging from \$25,000 to \$40,000, payable to the organization.⁷ Among the larger group of twelve sabbatical programs included in the Sabbatical Compendium,⁸ only one does not provide monetary support. The support offered by the other eleven ranges from \$12,500 to \$175,000. The majority provide support in the \$30,000 to \$40,000 range. This support is primarily intended to cover the executive director’s salary while on leave. Some foundations allow a portion of this one grant for organizational development support prior to, during, and after the sabbatical. Others provide a separate allotment for organizational supports.

⁷ The Alston/Bannerman Fellowship Program makes its \$25,000 contribution payable to either the organization or the sabbatical awardee, leaving the choice to the organization.

⁸ *Sabbatical Compendium*, R. A. Stewart, The Durfee Foundation, 2007.

Continuity of Foundation Program Staff

What emerged in discussions with staff that initially conceptualized or currently lead a sabbatical program is a deeply held conviction, based on direct experiences with awardees, of how well these programs serve nonprofit leaders and their organizations. As a result, they have a strong personal commitment to their sabbatical programs and provide continuity regarding lessons learned from year to year.

Long-term staff of these programs, such as Madeleine Adamson at Alston/Bannerman and Claire Peeps and Carrie Avery at The Durfee Foundation, retain knowledge that builds from cohort to cohort and use this to improve their programs.

In the case of the Z. Smith Reynolds Foundation,⁹ Jean McLendon has consulted to the project since its inception in 1991. She has a wealth of experience and wisdom from her years of working with sabbatical awardees. When foundation program staff turn over, this kind of ongoing relationship with a partnering consultant, documentarian, or evaluator can assist with capturing lessons and build institutional memory.

Each of the above commented on the importance of staff (or intermediary) continuity for several reasons:

- There is both art and science to the selection process as described below. The art portion is a growing “wisdom” and even “human touch,” which can develop only over time. Sabbatical programs are very personal—the gift or the award of time is to the individual (even though the organization receives compensation). Program officers related how making these awards requires sensitivity and some nuanced due diligence. Likewise, understanding how much to guide awardees while allowing them freedom to do as they wish with their extended time away from work is a nuanced skill gained from experience.
- Intentionally and consistently capturing learnings helps preserve new knowledge from cohort to cohort. Even where third party helpers, such as evaluators or consultants, assist with codifying lessons learned, it is the program officer’s job to apply such lessons to improving the processes of the sabbatical program.
- Foundation staff who have led sabbatical programs over a number of years build relationships with counterparts at other foundations in which learnings are shared and field-building studies are jointly funded.

⁹ Z. Smith Reynolds Foundation is not part of the study. However, they have one of the oldest nonprofit sabbatical programs in the country, founded in 1991 after a 1989 pilot project. Jean McLendon was interviewed in part to gather her long-term perspective on sabbaticals for nonprofit leaders.

Selection Process

Selection criteria:

Foundations have a number of criteria or screens for their sabbatical programs. One criterion common to all programs is that their awards are intended for effective, proven leaders of nonprofits to provide them time away from work. The foundations providing sabbaticals have a variety of other screens for making their selections. The most typical are:

- **A minimum length of service in their nonprofit and/or their field (e.g., the arts, human services, community development).** Ten years of service is common, although some foundations require five years of service, and others have no minimum requirement.
- **Geography.** This is defined by the foundation’s grant making region.
- **Types of nonprofit fields.** Foundations typically provide sabbaticals to leaders of organizations that fall within their usual giving areas.
- **Staff position in the nonprofit.** Sabbaticals are most frequently thought of as awards for executive directors; however a number of programs provide sabbaticals to staff in different roles. The Alston/Bannerman Fellowship Program is for “persons of color with 10 years of community organization experience who have a commitment to work for social change.” Other foundations, such as The Durfee Foundation,¹⁰ also extend their sabbatical programs to “senior managers” with a minimum of 10 consecutive years in the sector and who bear principal responsibilities for implementation of mission, fundraising, or management of finances.

As one program officer said, “The selection process is not neutral.” If the above screens are fairly value neutral, the art of selection comes into play when balancing for gender, age, race, and ethnicity among those eligible and when considering timing, organizational stability, and the “need” for a break. For foundations that convene an awardee cohort periodically, some thought is given to the mix of leaders with respect to leadership style and role in a given group.

Alston/Bannerman at one time split its awards evenly between males and females. Now that proportionally fewer males work in nonprofits, they have loosened this balancing requirement. The Barr Foundation has found efficacy in having a range in age—bringing leaders closer to retirement age together with younger leaders. Their evaluation results show that the awardees enjoy this diversity of age.

¹⁰ The other foundations included in the Sabbatical Compendium that provide sabbaticals to senior managers are McCune Foundation, George Cedric Metcalf Charitable Foundation, and The Chicago Community Trust.

Application Process

The majority of foundations rely on a multipart application and screening process. Some of the foundations, such as Durfee, do selection by committee. Durfee’s committees and those of other foundations include a mix of staff, trustees, and former awardees. Some but not all of the foundations do site visits.

Durfee staff speak to the importance of the site visit as a way of understanding what impact the organization may experience during the leader’s absence and how supportive the staff are toward the leader. In the final analysis, this insight can help identify the more effective leaders for selection.

Four of the five programs have an application process in which potential candidates apply and are selected in a competitive process. One program selects through an anonymous process similar to the McArthur “Genius” Award program.

There are variations to be considered with the type of application process chosen-- competitive application or anonymous selection. For foundations that require applications, it is important to ensure that there is some mechanism for encouraging leaders who would never think to “recognize” themselves for whatever reason and will not apply of their own volition. Helping promote the general benefits of sabbaticals for leaders in the local community or encouraging current and past awardees to talk to their peers about the sabbatical experience are ways to bring more deserving leaders into the process.

Conversely, those that do not use an application but select through a nomination process may be putting a leader into the position of feeling that he or she cannot say no to the opportunity, even if the timing is not optimal. A problematic sabbatical leave could ensue. Offering the opportunity to defer the sabbatical is one way to avoid a poorly timed leave.

Selection for a sabbatical is delicate. A rejection can be taken personally. A formal letter gives the person time to absorb that they have not received the sabbatical—they can compose themselves before the program staff person calls as a follow-up a day to two later.

Key Supports Organized by the Foundation for Awardee and Organization

There is a range of supports offered by sabbatical programs to awardees, interim leaders, and staff. Key among these are:

- Pre-sabbatical orientation
- Support to the organization during the awardee’s absence and in particular to the interim leader
- Reentry support for the awardee
- Organizational development support
- Convening of awardees

Pre-sabbatical orientation has been strengthened over time by all the participating programs, with a scope ranging from individual conversations to provide information and support to a full retreat for an awardee class. The orientation helps the awardee become aware of lessons learned from previous cohorts—for example, the importance of good personal preplanning for the sabbatical, while also preparing the interim and the organization. Many of the programs have alumnae speak to the current cohort and respond to questions about the experience. Eighty-three percent of awardees and 73% of the interim leaders surveyed for this study report that the sabbatical funder provided an orientation or print materials on best practices in order to maximize the benefits of the sabbatical. And 71% said that board orientation and involvement was part of the sabbatical planning process.

Some of the foundations included in this study also provide support for awardees’ organizations. Capacity building assistance for an organization and its interim leader reinforces the message that the sabbatical is not just a gift to the awardee but that the organization will also grow as a result of the award. Several of the funders pay a consultant or a consulting firm to be on call and/or deliver assistance upon request during the sabbatical. Barr uses an external consultant to gather the interim leaders¹¹ together at least two times for peer support and some expert guidance. Piper offers \$10,000 for staff development; Durfee offers \$7,500 over two years to support staff development. Eighty-six percent of interims report having been provided with supportive meetings by the sabbatical funder or a consultant or consulting firm during their interim tenure.

Some of the funders make formal coaching available to awardees pre- and/or post-sabbatical. In the private sector, coaching is primarily used *before* the sabbatical to help the awardee reflect upon how he or she wishes to use the time away. This is a sound practice, as is the coaching offered by some of the sabbatical programs. Post-sabbatical, coaches can assist awardees in clarifying their insights and incorporating lifestyle and work-style changes. Coaches can also help the interim leader and the staff identify their learnings and make them permanent. Seventy-one percent of awardees and 40% of the interims used coaching or mentoring as part of the sabbatical process.

The point of reentry is delicate for both the awardee and the organization. Sixty-two percent of awardees report receiving advice on how to best re-enter the organization—typically as a listener—and how to solidify the positive impacts of their sabbatical.

Convening

As described in the section on organizational impacts, one key role the foundation plays is in convening program alumni—at least once a year. Conveners recommend devoting part of the agenda to building connections among the awardees and part as “open space” for whatever content emerges from the group. Without the convening role played by the foundation, there would be less emergence of cross-field collaboration, as cited by the awardees.

¹¹ Barr has the only program where all of the Fellows are asked to take their sabbatical at the same time—over the summer. This enables the interims to convene together during their leaders’ absence.

Other Lessons Learned

Findings suggest that guidelines strongly discouraging awardees from contacting their organizations during the leave time are important to creating a successful sabbatical experience. In fact, without such guidelines and their gentle enforcement, a high number of awardees (the Type A’s!) would likely contact their organizations.

Families are affected by the leave as well. Some programs provide guidance not only to organizations but also to awardees’ families when planning for the sabbatical. Barr staff cite learning this lesson from both Durfee and the Kellogg Fellows Program. For example, they invite the awardees and their families to a big celebration at the end of the sabbatical.

The optimal sabbatical length is three to four months. Some of this study’s funders started out providing eight weeks of leave time and found that the restorative effect was not there. It takes the third month to reach many of the outcomes outlined in this study. More than four months away can create a hardship on the organization and not necessarily increase the benefits it receives. One of the programs has recently changed its guidelines to allow awardees to break up their leave time over the course of the year. As this is less “disruptive,” it bears watching whether or not the same benefits accrue from non-contiguous sabbaticals.

Periodic evaluations have helped funders improve their protocols and create a reflective practice for foundation staff and awardees alike. Rasmuson uses a consultant to follow the foundation’s processes and the outcomes for the awardee and his or her organization, as does Barr. Rasmuson’s staff have found that this has sharpened their foundation’s application and orientation materials, as well as other aspects of the program.

Challenges for Sabbatical Programs

For the awardee organizations

Twenty-one of 60 awardees surveyed (35%) reported some negative impacts or challenges resulted from being on sabbatical. Most of these impacts were minor or unique to individual applicants, as for example, a leader who missed the graduation ceremony of one of the organization’s programs.

However, a more general theme surfaced around the way in which a sabbatical sometimes uncovers areas of organizational weakness, such as:

- Over-dependence upon the leader as lead fundraiser (with no one stepping up during his or her absence)
- Increased strain on an already under-capitalized nonprofit, which results in a particularly stressful experience for the interim leader
- Organizational politics, such as described by one awardee: “A power vacuum was created and a couple of employees took advantage...”

- A dawning awareness that a leader on sabbatical is no longer quite the right match for his or her organization, which may lead to the leader’s resignation as an unintended consequence

One interesting challenge for some organizations is the “creative tension that bursts forth,” as one awardee put it. A number of awardees were surprised to discover some level of conflict or creative tension when they returned, not understanding that their very absence—the removal of their role as a “gatekeeper” who paced the action, and managed the discussable and not discussable—can sometimes result in a “bursting forth” of held-back energy. This outcome can seem negative on the surface, but it can work out as a long-term advantage for an organization. Although the new energy can be disorienting, especially when it seems to be fueling conflict, it can lead to a growth spurt in organizational capacity—a positive outcome for leaders who, rather than feel threatened by change, embrace and manage it for the good of the cause.

For the awardee

- The gift can be a financial strain—especially for those who want to leave their home communities to get true separation.
- Many return disoriented by the sabbatical experience. The majority find their footing, although this may take some time, as their comments reveal:

“There was a deep unsettling effect, which took me through some depression and disorientation before reaching some epiphanies and inspiration.”

“It took me a long time to find my rhythm again, maybe three to six months.”

For some, however, the disorientation eventually leads to departure.

- Reentry into an organization can be particularly difficult. Even the most enlightened leaders need to adjust emotionally after realizing that their organizations flourished for three months in their absence. And then they have to adjust to sharing influence and delegating. For others, the return to mundane tasks after a time of reflection is difficult. This re-immersion into daily operational detail can be a major letdown after a respite of several months. One awardee reported returning with the “desire to focus on those areas that are my strengths—visioning, leadership, relationships, and not the day to day details.”

Part III: The Case Studies

SAUNDRA BRYANT

Staying Power

Saundra Bryant grew up in Los Angeles, in the neighborhood where she now works. Her parents found childcare two blocks from their home at the All Peoples Christian Center. The Center was founded in 1942 as a multiracial institution informed by faith and acting upon community concerns. Saundra says that the people at the Center helped raise her. Little did she know that one day she would return and lead the organization for over two decades.

As Saundra grew up, she realized that the people who got to make the decisions were those with college degrees. Inspired by what she saw, she went on to get a social work degree and a graduate degree in administration and planning and then worked in South LA for four years in a children’s services agency.

At that time, the Center started a national search among associate directors who could move into the executive director’s (ED) position there. Saundra applied, and with the advantage of being “home grown,” she soon became the organization’s new ED. She anticipated that she would remain there for five years before setting out for a new horizon, but her new job/life became all consuming.

In 1996, the APCC split the church and social service agency. Saundra provided a leadership role on both sides—as an elder in the church and director of the Center. Her family, friends, and associates all grew up together. Now, whenever they met, their focus was either on the neighborhood or the Center. Everything she did involved “All People.”

Saundra first learned about sabbaticals when she became a Eureka Fellow in the mid-1990s. This gave her a taste—one week at a time—of what reflective space and distance from the job could do. After 16 years as leader, she was growing tired. She wasn’t thinking about leaving but felt emotionally drained. Then she became part of The Durfee Foundation 1999 class of awardees.

The Durfee Foundation asks that awardees on sabbatical not contact their organizations. Because Saundra’s whole life—social, family, and work—was intertwined with the community and the Center, she decided to plan a sabbatical that would take her away. Her first step was to go with her husband on the honeymoon they never had—and to “make up for him marrying me—and *the Center*.” He took the first month off with her so that they could reconnect. They traveled and vacationed together during this time. She then spent time with friends and family outside of Los Angeles. Finally—and this is key to many sabbaticals—she took time by herself to reflect upon and evaluate her life.

Saundra began her sabbatical wondering if she was still good for the Center. She was aware of her long tenure and did not want to stifle the organization’s growth. In seclusion, she took a spiritual gift inventory and through thought and prayer realized that

she was exactly where she needed to be, that her position was more than a job: it was her purpose.

When Sandra returned, she gathered a lot of new information from her team. The second in command liked what he had learned but said there was “no way” he would want to do the job permanently. Other staff gained new insight into the types and breadth of decisions Sandra was making on a day-to-day basis, giving them a new perspective on the executive director position. They also had done a fine job managing in her absence. It was new for them to think that they could, if necessary, function without Sandra.

The experience had altered everyone, and it called for new patterns in the way all of them worked together. As a group, they discussed ways they could re-organize—things that Sandra was doing before that others in the group could take over. This brought Sandra to the realization that in the past she had always met with managers individually. As a result, one change she made upon her return was to meet with them as a group more often, in order to encourage cross fertilization of ideas and support.

The sabbatical program has given her and the organization more connectivity. Through Durfee’s convenings of sabbatical program alums, she has made new contacts. The “aftercare,” as she calls it, created by Durfee builds relationships and helps bring together peers with similar experiences and challenges.

It still is difficult to take time, but Sandra has not returned to her old ways and allowed herself to become completely consumed by her work. She often plans a “time out” for herself, even if only for something small such as getting her hair done.

Sandra’s advice: rest and relaxation are critical to a sabbatical. It is through rest that the creative and spiritual self reawakens, and it is that self that is open to learning. Making a clean break from the organization—and the home community, if it is wrapped up in the work community—is essential in order to reap the full benefits of a sabbatical. And taking time alone to ask self-reflective questions is also important. “Am I still a match for this organization?” was Sandra’s key question. She knows from her role in the church that faith-based groups build in sabbaticals as a cultural norm. Her wish is that more of the nonprofit sector would move in that direction.

Sandra has her purpose. And she says that “the interaction with the kids helps her know that she is doing the right thing and making a difference.” It is when she loses that connection to the people central to the All Peoples Christian Center that she will know it is time to leave.

LITTLE TOKYO SERVICE CENTER

Three Perspectives—Awardee, Interim, and Board President

Bill Watanabe is the executive director of the Little Tokyo Service Center in Los Angeles. Bill started his career as an engineer but “quickly realized engineering was not suited to me.” He found the community involvement of friends who were social workers more appealing, so he entered UCLA and received his masters in social work in 1972. After working in a couple of Los Angeles community centers, he decided to start the Little Tokyo Service Center (LTSC) in 1979. “I got a small grant and became the executive director [ED].”

LTSC has an operating budget of \$8 million, with 100 fulltime and 50 part-time employees. Programs under the Center's umbrella include childcare, afterschool and youth programs, family counseling, domestic violence counseling and shelter, affordable housing and community/economic development, services for the elderly, and other programs to serve low-income or non-English-speaking people in need.

Bill's Perspective

Bill first entertained the thought of taking a sabbatical after serving as a professional reference for a colleague who had applied for a sabbatical award from the Durfee Foundation. When a Durfee staff member encouraged Bill to apply, his first thought was, “I'm not burnt out. I really don't need one. I really love my work.” Durfee staff asked him to consider that the sabbatical would give LTSC an opportunity to function without its founder of 20 years. When Bill mentioned the possibility to his board, they immediately encouraged his application.

Bill's three-month sabbatical in 1999 included a three-week guided tour of Israel and Egypt and a week in Tahiti, both with his wife; a two-week unstructured road trip with his brother-in-law; and a one month stint writing his autobiography, as a gift to his daughter. “The writing was very stimulating. A lot of memories came back.” The trips and the writing time were “a once in a lifetime opportunity, things I would never have otherwise done” without the sabbatical award. “The experience gave me a great sense of self-worth, realizing that [through my community work] I had earned the award.”

Bill's deputy director served as interim ED in his absence. He judged her very competent in her deputy position, and he had full confidence she could lead the agency in his absence. He had expected her to succeed him eventually, but she left LTSC six years after the sabbatical to be a full-time mother for her two young children. During the sabbatical, two of her deputies took over her duties while she was in the top job. One of them is now a deputy to Bill. Bill used a significant portion of the Durfee award to supplement the salaries of the three managers.

As a result of insights gained while on sabbatical, Bill undertook a dramatic restructuring of LTSC, with succession in mind, and energetically ramped up a community organizing project that had been stalled.

At the time of Bill’s sabbatical, LTSC was two separate 501(c)3’s, one a community services center and one a community development corporation. Bill was the concurrent executive director of both. “It worked for me because I had started them both.” But Bill realized it would be difficult for one successor to serve in both positions separately, so he began the process of merging them.

The sabbatical also helped Bill expand his vision of advocacy. In 1994, LTSC had begun a search for a site to build a large gymnasium in Little Tokyo, a high priority need for the community. By 1999, little progress had been made. With the “fresh set of eyes” Bill gained on his sabbatical, he reviewed several LTSC projects with the question, “Why are we doing it that way?” With particular regard to the gym project, he pondered, “Why should we not advocate more loudly for ourselves?” He realized he needed to create a bigger stir in the community. So he organized a vocal and visible demonstration in Little Tokyo that drew 500 people. “Politicians and funders saw it,” and things began to happen.

On reflecting ten years after his sabbatical, Bill sees helping leaders recharge as one important purpose of a sabbatical. The opportunity had created in him a new energy that translated into a greater capacity for organizing advocacy efforts for his community. He believes a critical outcome for LTSC was the leadership skills his top managers developed by filling in during his absence.

The Interim Director’s Perspective

The deputy director of the Little Tokyo CDC, one of the two linked agencies Bill headed at the time, stepped into the interim ED role as leader of both agencies. She relates that her biggest challenge was providing adequate administrative oversight for the programs that were not part of the CDC. She also reflected that Bill’s leadership style, like that of most in his generation, is “casual” and relationship based, where as she is systems oriented. Her interim leadership thus provided the opportunity for the organization to experience a dramatically different kind of management style, which she said the staff of her younger generation appreciated. In his casual style, Bill gave her very little orientation to the ED job, trusting that she was fully capable of mastering it with little formal preparation. She acknowledges that she indeed handled the job well.

Her report on the outcomes for Bill is the same as Bill’s. He came back a lot more fired up. He was determined to get the gym built “no matter what.” He was less laid back and accepting of the status quo. He focused energetically on a few projects, in contrast to his pre-sabbatical approach of dispersing his attention evenly over a much larger array of LTSC initiatives.

The Board Chair’s Perspective

The board chair corroborates Bill’s report that the sabbatical provided a springboard to strengthen the agency’s second tier of leadership. But he diverges in that he feels Bill was indeed experiencing some burn out pre-sabbatical. Bill had led tremendous growth in the 20 years since he had founded LTSC, and the staff had expanded to over 100. Because of

Bill’s collaborative, non-hierarchical style, “Everyone reported to Bill and sought his input...He was getting a little frazzled and over-extended.”

So the chair saw the sabbatical as a chance for Bill to rejuvenate and discover that “the organization can survive without you.”

The chair also recognizes that serving as interim ED put considerable strain on Bill’s deputy and that she did an admirable job in spite of it. “She was great on the real estate (CDC) side, directive and tough.” In hindsight, he acknowledges that the board should have worked more with Bill and her to prepare her for the interim role.

The chair reports a dramatic impact on the administrative structure of the agency as a result of the sabbatical. The board developed the awareness that Bill is the right overall leader for LTSC and is particularly strong in working with the community to achieve LTSC’s goals, but others need to be the inside managers, staff who are systems and detail oriented. He says Bill came to realize the need to build a stronger second tier of leadership and to move out of daily management. “The sabbatical experience forced us to get prepared with a different administrative structure,” which included merging the two separate 501(c)3’s. “Now, if Bill were to leave tomorrow, the organization would be in very good hands.”

MARIA ELENA LETONA

The Letting Go

Maria Elena Letona had led Centro Presente, a well known immigrant rights organization in Massachusetts, for seven years when she got the call from the Barr Foundation in 2005 asking her to be in its first class of sabbatical awardees or Fellows. She was honored, but not sure she wanted to go on sabbatical. The organization was humming. She and it were hitting stride. They had just completed three year’s worth of work transforming a service agency into an organizing and advocacy organization. Elena felt unsure about leaving at that time.

She did leave though, especially because she felt the \$30,000 stipend that came along with the sabbatical for the organization would be good for Centro. Elena had no idea how changed she would be when she returned. Her sabbatical story is about finding one’s self by letting go. It is about those leaders who so closely self-identify with their work that they do not know where it ends and they begin. It is about how separation and reflection can begin a shift in perspective of self vis a vis the organization and how the organization begins finding it is capable of moving on without “the self” of the ED.

Like many others, Elena came to nonprofits through a long journey. She started playing piano at the age of six in El Salvador. She lived a sheltered life focused on music and went to Oberlin College Conservatory. Upon graduation, she decided not to pursue a professional career in music and ended up temping at a nonprofit. That experience changed her life. She was working on a project, for the City of Boston, that exposed her to a side of American life she had never seen. Elena was shocked to discover that there were conditions here in the U.S. similar to those in El Salvador and that people of color were disproportionately affected. She decided to go back to school to study public policy.

After the previous director recruited her to Centro Presente , Elena became the organization’s interim executive director and later its permanent executive director. She fell in love with Centro. She worked there tirelessly on behalf of immigrants’ rights and to fulfill a vision of changing a service oriented group into a constituent led advocacy organization. This vision was just coming to fruition when the call came in from the Barr Foundation announcing her selection as a Fellow.

Barr is unique among sabbatical programs in that it convenes all of its awardees together for two weeks on a trip that not only takes them away from work and home, but also immerses them in another culture in a way that radically disrupts their routines as well as their usual perspectives and ways of thinking.

Elena was no exception. In fact the trip she took to South Africa and Zimbabwe created a disruption so powerful that she did not return the same person. She was not expecting to be amazed or surprised by what she saw in her travels, but it touched her deeply—“to the core”—and she says she will be processing the experience for the rest of her life. She witnessed radical ways to do social justice work—restorative, inclusive frameworks

grounded in “an unflagging faith in the ability of all...to contribute to the health and well-being of the whole.”

Elena’s return to her organization after her sabbatical was a celebration of love. To ease back in, she had people over to her house before returning to the office. The staff, for their part, welcomed her with open arms. Activities flowed around her in such a way that she questioned whether she was still needed. By the same token, she felt the isolation of knowing the sabbatical experience could not be viscerally shared. The time away had shifted her mind and spirit—but as the experience had been unique for her, she could not find a way to adequately communicate her feelings to others.

The sabbatical helped Elena begin to define the edges of the border between herself and the organization, as well as ways to set boundaries. She had found a part of herself while on sabbatical and separate from work—she played the piano again and traveled to El Salvador on an important personal quest.

Elena discovered that, *“We are valuable, singular and special in a whole way—it is not totally dependent on work—what part of your whole are you sacrificing, if your whole self is defined by your work?”*

Reentering the organization can be confusing after a sabbatical—especially when a shift has occurred and the workplace environment will not be the same. Although Elena had left for sabbatical feeling at a peak in her work, she felt anguish and confusion during the first six months after her return. She describes going to work more in body than in mind. She returned to herself eventually and carried on with the organization, but things were never the same as before. After two more years, she finally circled back to her post-sabbatical insight that she had contributed all she could as a leader to Centro.

Elena feels the most important leadership quality is the capacity for self-reflection. She had to look in the mirror with love and honesty. It was time to let go. She had finished the journey she had set out on. So two years after her sabbatical, she began to plan her transition.

Elena says that “you have to create spaces in organizations” to hold change. Once she decided to leave, she set about intentionally creating that space without announcing her intentions to anyone. She delegated to staff and then stepped out of the way. She cut her hours down. She put the lessons she had learned from her sabbatical about boundaries to good use.

Almost three years after her sabbatical, in February 2008, she told the board president she was leaving and shortly thereafter announced to staff, “I am not leaving right away. We will work together to figure out how to prepare for this transition.” And they did.

Elena did not enter the sabbatical knowing that she would be so deeply moved and simultaneously disrupted. She did not know that this disruption would lead her to the realization that Centro could go on and grow without her. The untangling of

organization/self-identity took three years, but they were three years in which Elena could work to strengthen Centro, create the space for change, and then experience a healthy transition with the love and support of the staff and community that mean so much to her.

PETER CERVANTES GAUTSHI

A Leap from Local Work to International Organizing

For Peter Cervantes Gautshi, his six-month sabbatical was the start of an 18-month period of renewal, reflection, and transition to a wonderfully productive new phase in his long career as a leader in organizing low-wage workers. After 30 years of doing the all-consuming work of a community organizer, Peter was worn down. He felt that “it was time to do new things.”

He reports, “I didn’t start out to create a new international organization (for addressing the needs of low-wage workers), but that’s what happened.” And it happened as a result of having time to get away, ponder lessons learned, write, and visit with organizing peers across the country.

Peter began his career as a labor organizer in 1965 as a young farm worker in Southern California. Over the years he cofounded several labor-community coalitions, and in 1991, he founded the very successful Workers Organizing Committee of Portland, Oregon (WOC). He received his sabbatical award from the Alston Banner Fellowship Program in 1996.

Peter applied for the sabbatical because he wanted both to renew himself and to make major changes in his work life. At the time of the award, he was in the early stages of transitioning out of WOC. “I needed to leave to make room for leadership to develop within the organization.” He also saw that organizations similar to WOC around the country were beginning to fail, after years of relative success. He believed there was a need to develop a fresh approach to the challenges of organizing low-wage workers.

The sabbatical turned out to be the start of a much longer transition for him. He organized the six months covered by the sabbatical award around two major activities: a “roots search” with his wife and daughters in the regions of Mexico from which their ancestors had emigrated to the United States and a look at the conditions for low wage workers in the factories to which U.S. corporations were moving their manufacturing operations following the passage of NAFTA.

The travel time in Mexico was especially healing for Peter, his wife, and their two young daughters. It was a clean break from the “workaholic” lifestyle of a community organizer and the resulting family tensions. Peter describes the organizer’s ethic as “You do whatever it takes, even if it means working 100-hour weeks at times.” A sabbatical provides a “positive shock to that lifestyle, which will dehumanize you if it is unrelieved. You can end up miserable, unable to relate to people, and ultimately ineffective in your

organizing work [if you don’t get away from it periodically]...It was important to physically leave from Portland; otherwise I would not have changed my patterns.”

Post-sabbatical, Peter set about interviewing organizers of low-wage workers in the United States and writing about his observations. He saw that workers were now moving in both directions across the Mexico-U.S. border—south to the post-NAFTA factories opening in Mexico and north for low wage work in the United States. For an organizing effort to be effective, it too would have to straddle that border.

Peter spent 1997 brainstorming with peers about how best to structure this new, international organizing effort. He got grants from various foundations to support his writing and planning efforts. The big result was the creation in 1998 of Enlace, a membership organization comprising worker centers, unions, and organizing groups in the U.S. and Mexico. Enlace uses an integrated approach to organizing that involves creating campaigns for economic and social justice, while developing systems that strengthen organizations internally in an effort to bring balance to the struggle between the rich and the working poor.

Peter sees the Alston Bannerman program as “extremely important in allowing time for getting grounded” and developing fresh strategies in pursuit of a social justice mission. For him, “Had it not been for the sabbatical, there would be no Enlace.”

TAMARA J. WOODBURY

A Leader’s Leader—Transforming the Field of Girl Scouting

If there is a poster-child for what an already extraordinary leader can do with a little time for reflection and rejuvenation, it is Tamara Woodbury. Quite simply, she is at the heart of a “re-founding” or reinterpretation of Girl Scouting’s tenets, both in Arizona, where she works, and nationally.

Her story begins as a young girl. She grew up in a conservative environment where joining the Girl Scouts was “an act of defiance.” However, scouting served as an oasis in the desert for her. She describes her scouting experience as the first time she was seen for “who I am” and that her talents were recognized. As a young woman studying to become a doctor, Tamara decided to “gift back” to the Girl Scouts by volunteering at a local council. The executive director there offered her a job. Tamara decided to take a year off from her studies and take the job—similar to a “Peace Corp” experience, giving back to the community through the Girl Scouts. That decision changed her life. Tamara found her home with the Girls Scouts, never returned to her study of medicine, and 27 years later, had served as the executive director of two organizations dedicated to women and girls: the YWCA in Washington, DC, and her current position with the Girl Scouts-Arizona Cactus-Pine Council.

Tamara describes herself as a lifelong learner, and when one of her colleagues recommended that she apply for The Virginia G. Piper Charitable Trust sabbatical

program, she saw it as an opportunity to receive some education that the Council could not afford to offer to her.

Tamara was looking for space to learn, reflect, and write. She knew she needed time away from her usual everyday activities to go deeper with her emergent thinking about a renewal of Girl Scouting’s basic principles and the transformation of the Girl Scout organization.

She designed her sabbatical in two parts. The first enabled her to follow her deep interest in learning organization theory by going through a program at the Society of Organizational Learning (SoL Institute), under Peter Senge’s direction, and attending a thematically related course: Authentic Leadership in Halifax, Canada. The second was a four week retreat to her cabin in Flagstaff, where she spent mornings reading and writing and afternoons hiking and relaxing. What Tamara thought and wrote about during her sabbatical has led to nothing short of a transformation for the Cactus-Pine Council. The mix of learning and rejuvenation afforded by the sabbatical has led to a ripple effect that seven years later is still deeply altering the organizational culture, practice, principles, and effectiveness of local and other Councils nationwide.

In essence, Tamara’s sabbatical allowed her to look at how most women’s lives, from girlhood on, are shaped from the outside-in—what society and family expect of girls and women. “The world around young women teaches them to focus their attention on their exterior, giving over-weighted value to the opinions of others versus their opinion about themselves.”¹² Tamara’s reflection was that the current institution of Girl Scouting—while an excellent opportunity for learning new skills—did not help adult volunteers to help girls “possess the self knowledge and self esteem to be the leaders of their own lives, providing girls with an example of a coherent understanding of character and values from the inner sources of one’s human spirit.”

Tamara systematically began to deepen her own thinking and to revolutionize her Council. She engaged staff and board in a deep listening project, first finding out what the girls really want and need: “committed friendships and a sense of belonging.” The Council sought information from their 9200 volunteers (working with 26,000 Girl Scouts). They discovered the volunteers did not believe the Girl Scout council trusted them, as evidenced by the high number of regulations and requirements reinforced through language in written materials. The Council reviewed its own “organizational artifacts,” and staff and board members were “amazed at both the language we had chosen to employ and the bureaucratic barriers we had unintentionally established—all in the ‘best interest’ of our organization.”¹³

Tamara then embarked on a five year (r)evolution, still in process, to embed a new culture into the Council—one that relies deeply on the 1912 founding “spirit of love” and

¹² T. Woodbury, *Leadership Development from the Inside Out* (paper)

¹³ T. Woodbury, “Building Organizational Culture—Word By Word,” *Leader to Leader* 39 (Winter 2006). This article is a must read for people interested in how to achieve an aligned organizational culture and more. Copies of the article are available by telephone . Call 201.748.8771.

mission of Juliette Low and says that today the Girl Scouts’ job is to “build deliberate environments where acceptance of each girl is primary, where adults and peers really listen to the girls’ questions and needs, where girls can explore the things that matter most to them, and where preteens and teens learn to hear and trust their own inner guidance.” Programmatically the council began a shift from *telling* girls how to be leaders to helping girls *source* their leadership from the inside-out. They employ new techniques like storytelling and intergenerational support through elder circles of women who have been Girl Scouts or otherwise attained the wisdom that comes from living a full life—employing these new techniques to help girls in “authoring your own life.”

The Girl Scouts-Arizona Cactus-Pine Council also invited its national staff, especially the national CEO and those in charge of new program design and materials, to witness some of its key learning sessions and the pilot of the Oxford Youth Leadership Program, which focused on helping girls find their inner compass. As a result, the national team began to translate the learning and activities of the Cactus-Pine Council to the national level and is in its own transformative process, developing and nationally promulgated three practice principles called the “Three Pillars”:

- Discover Self
- Connect with others
- Take action to make the world a better place

How did a sabbatical contribute to the flowering of the seeds planted in Arizona, “where girls grow strong and women grow wise”¹⁴ to change at the national level?

Similar to other successful sabbatical experiences, Tamara used her time away to disconnect. She traveled to a remote location, removing herself from day-to-day work and home-life patterns. She had very slow access to the Internet, which allowed her to feel even more separated. She wrote in the morning and then hiked and relaxed in the afternoon. Tamara had started working part-time at a young age and full-time by age 19. She had been going full-tilt ever since and had never experienced a serious break from work. She describes herself at the onset of the sabbatical as burning out and not in the best of health. Just the exercise alone—every day for five weeks—created a sense of renewal. She describes the sabbatical as providing a fundamental impact on her capacity to *sense* what might be in the future. The time away from normal routines allowed for the emergent thinking that later underscored the actual changes she made. “When you get away from the ‘darn dailies,’ it helps you refocus on how you are seeing,” she says.

Tamara’s seeing—or emergent thinking—led to her articulation of her ideas in writing. This writing then manifested into actionable steps that shifted the organizational culture at Cactus-Pine Council to focus on the inside-out of girl’s leadership development by changing its policies, systems, management structures, and language. The result has been an ongoing process of managing change from a culture of conformity, restraint, and risk

¹⁴ Taken from *The Flowering of the Girl Scouts—Arizona Cactus-Pine Council*, “Where Girls Grow Strong and Women Grow Wise,” a written documentation of the change experienced at the Council between 2001 and 2007, available at www.girlscoutsaz.org.

aversion to one of unleashing the human spirit and tapping into that spirit as the organization’s most renewable resource. Self-managed teams have replaced hierarchical models, and accountability has become flatter, rather than up-down. The volunteers receive guidance in their work with girls rather than given prescriptive “how to’s,” and the board of directors now gathers annually to look differently at its style of leadership, change the way it deliberates, and mirror the new learning-circle team-based culture of the organization. The organization itself has become less risk-adverse and more adaptive and innovative.

Tamara and other sabbatical awardees are supported by Judy Mohraz, the president of the Piper Trust, who holds an informal breakfast once a month with the Piper Fellows. In the breakfast dialogue, the groups’ sharing led to the development of a core-learnings course on organization for other nonprofits in Phoenix. Piper brought in facilitators from the SoL Institute, and Peter Senge donated his time. The course made some of the deeper changes and lessons that emerge from sabbaticals available to other nonprofit organizations.

Tamara’s tips for sabbatical takers: “Listen to your heart. Taking a sabbatical is about integration of the body, mind, and spirit. Get your body healthy, listen to your inner voice, and integrate your intellect. Don’t be so defined about what you expect as outcomes—allow for something to unfold that is really healthy for you and for your organization. If you define it from the beginning, there may be fewer emergences. What flows back from the organization, as a result of allowing for emergence, can be powerful.” And for funders and boards of directors, “When you invest in people deepening their own relationships with themselves and their own knowledge, you can expect exponential results in return. It is not always visibly measurable—especially within 12 months—but there is a point on the curve post-sabbatical where results—sometimes exponential—reveal themselves.”

MICHELLE DEWITT—TUNDRA WOMEN’S COALITION Sabbaticals are for Younger Leaders Too

Like many people who end up leading nonprofits, Michelle DeWitt had a different career in mind—journalism. After college, however, she decided to take a year as part of the Jesuit Volunteer Corp. The JVC, as it is known, has had a long-term relationship with the community of Bethel, Alaska, situated on the Kuskokwim River in the middle of a national park accessible only by boat or plane. Bethel is home to 6,000 souls, nearly half of whom are Native American.

JVC has a long history of supporting the Bethel community and has placed many volunteers there. Michelle was asked to work with the Children’s Program at an organization called the Tundra Women’s Coalition (TWC), which confronted the issues of domestic violence and sexual assault. After her year, she looked at other options—particularly her degreed field of journalism, but she felt that she had landed in a place where she still had much to learn—about the region, about different cultures, and about herself in this setting. Michelle decided to remain and took a position in the TWC’s legal

assistance department. She provided legal advocacy for victims of domestic violence for two years. During her first three years at TWC, she worked under three different executive directors. When the third left, the board of directors asked her if she would apply—she was all of 25 years old but already felt burnt out by leaders coming and going, and she stepped up to the job.

Organizations that go through multiple executive directors quickly are either on a path to closure or need a turnaround. Michelle did the work of turning TWC around, creating a stable organization focused on its community and mission. She admits that it was a steep learning curve for her at all levels. Anyone who has reversed an organization’s downward slide knows that the job requires a tremendous amount of energy and a capacity to fix what is technically wrong, while using adaptive and generative skills to heal and strengthen the organizational culture. That can take a lot out of a leader.

Michelle was unaware of how much energy she was putting into TWC until the Rasmuson Foundation called her five years into her tenure and asked her to apply for a spot in the first cohort of its new sabbatical program. The program puts special emphasis on those working in human services and also supports leaders working in isolation in Alaska’s vast rural areas.

Even without much forethought, Michelle knew that in such a small community, getting away would be critical if she were really to find the rest and renewal she needed. In a three month span, she ran a marathon, visited family, and traveled to Europe for six weeks. She returned to Bethel only for a few days at a time. She describes her sabbatical as “wonderful.”

While she was gone, the board of TWC stepped up and appointed a board member to stop by every day to check in on the staff and programs. Michelle delegated her responsibilities across a small staff. The group needed more coaching, parameters, and work on shared decision-making than they had time for and had trouble managing a crisis that arose in Michelle’s absences. In retrospect, Michelle now wishes she had delegated authority to just one person and would do so in the future, should she ever go on another extended leave.

Reentry post-sabbatical proved difficult. The time away gave her perspective on how much she had been doing before she left. After her return, she felt tired by 11:30 AM and couldn’t remember how she had actually managed the workload before. She was able to maintain a more balanced schedule for awhile, but a capital campaign and other needs soon had her working excessive hours again. Fortunately, one aspect of the sabbatical experience really stuck with her: the importance of taking long breaks. Michelle now structures three week vacations for herself, knowing that this length of time will help her rejuvenate. She also values and encourages vacation breaks for all of the staff. The sabbatical gave this same perspective to the board of directors, which now encourages Michelle to take breaks as needed. The sabbatical also helped the board build its own awareness about the importance of healthful vacations, especially for those doing crisis intervention work.

Michelle credits the sabbatical with giving her a respite that allowed her to remain as a leader for more years. She says that the sabbatical gave her that time to reflect and develop a “real healthy perspective on the organization and its role and the work that they do.” It is this work that she has steadfastly undertaken over the four years since her sabbatical. She feels that with another long break, she might be able to offer another few years of leadership—an important gift in this small rural community.

Michelle’s advice to those considering sabbaticals is to “leave your community” so you can truly disconnect, and formulate a back-up plan for the interim leadership role, in case your first plan does not work. As for those who argue they cannot take a break, Michelle would reply that this attitude is actually a red flag warning that the need for a sabbatical has become critical. No one is absolutely and irreplaceably essential, and it is important to dispel the self-perception—as well as any organizational perception—of the heroic leader’s indispensability.

For funders, Michelle’s advice is to continue funding these programs, even in tough economic times. In fact, she feels those are exactly the times when sabbatical programs are most necessary—to support leaders who might be on the edge of burn out and help them bridge from today’s tough challenges to a more balanced future. She says only one person from her original cohort has quit since the sabbatical, and she feels that, in part, is a credit to the sabbatical program. Michelle also believes the investment in the sabbatical was as important as any other grant Rasmuson has made to the organization—in some ways more so—as it is difficult to put a price tag on stable, quality leadership.

Part IV: Project Background and Methodology

Early Research

Several program officers from philanthropic institutions that offer sabbatical or Fellowship programs met at a convening of Grantmakers for Effective Organizations (GEO) in March 2008. They decided to study the efficacy of sabbatical programs in helping leaders rest, revive, and return to their organizations, energized for the future.

In 2007, the Durfee Foundation conducted initial research by reviewing sabbatical projects across North America. *The Sabbatical Compendium*¹⁵ was published in November 2007. The *Compendium* is an excellent start and a good example of the collaborative learning that was emerging among the participating groups. It supplies an at-a-glance comparison of twelve foundations offering some form of sabbatical grant program.

The programs’ goals are strikingly similar. At its most basic, the goal of a sabbatical program, as described by the California Wellness Foundation, is “to keep burnout, stress and fatigue from undermining the effectiveness of leaders.” However, different foundations have programs with different lengths, eligibility requirements, and grant amounts. Some award sabbatical grants to organizations, and others directly to leaders. There are varying program components, including retreats, intentional network building among the awardees, no network building, and so forth. The majority of foundations have an application process, meaning that at some level a leader must self-select into the program. One foundation has a committee that solicits recommendations for leaders for their Fellows program, screens nominees, and makes final decisions. The size of the award also differs, as does the length allowable uses of sabbatical leave time. The number of annual awards granted by the various foundations ranges from two to twenty a year.

To deepen the view provided by the *Compendium*, Durfee requested an informal, unpublished comparison of the evaluations, assessments, and write-ups created by eight of the twelve foundations to determine whether there were enough program features in common to merit a more intentional meta-study.

The Creative Disruption Project

Five sabbatical programs decided to participate in a study to further the field’s understanding of the impact of sabbaticals within the nonprofit sector: the Alston/Bannerman Fellowship Program (national), the Barr Foundation (Boston), The Durfee Foundation (Los Angeles), the Virginia G. Piper Charitable Trust (Phoenix), and the Rasmuson Foundation (Alaska).

The five factors (lines of inquiry) under consideration in a comparative study of outcomes were a sabbatical’s impacts on:

1. The leader who receives the sabbatical
2. The second-tier leadership at the sabbatical organization who provided executive leadership in the leader’s absence

¹⁵ Ronald A. Stewart, PhD, The Durfee Foundation, 2007.

3. The organization as a whole (including the board)
4. The field/geography in which the organization operates
5. The funder administering the sabbatical program

Project Steps and Methodology

The participating foundations hired Deborah Linnell, Third Sector New England, and Tim Wolfred, CompassPoint Nonprofit Services, to conduct the study. The steps included:

1. A review of existing materials and a preliminary report summarizing the past evaluations and reports generated by the five programs
2. A survey of awardees of the five programs for the period from January 1, 2003, to December 31, 2007. Also to the extent possible, a survey of second tier leaders who took on interim leadership duties during their director’s absence and of participating organization board members in order to further understand common key outcomes that providing sabbaticals can produce
3. Interviews with foundation staff and intermediaries (e.g., evaluators and consultants) who provided support for the sabbatical programs during these years, as well as interviews with foundation project managers and other contractors who worked with each program to determine or hypothesize which design factors contributed to which outcomes
4. Five case studies to deepen the understanding of various outcomes, e.g., a leader remaining in his or her position with renewed vision (rather than leaving); an interim leader gaining new insights and leadership skills; a board member’s enhanced role and contribution to the organization; and a leader who departed with a healthy transition plan as a result of the reflection time awarded through the sabbatical.

THE FIVE PARTICIPATING PROGRAMS—DESCRIPTION¹⁶

Alston/Bannerman Fellowship Program

Goal of Program

The Alston/Bannerman Fellowship Program *goal* is to advance progressive social change by helping sustain organizers of color by giving them time for reflection and renewal. The program began in 1988 and has provided 185 fellowship awards on an annual cycle of 4 to 10 a year. The average length of the fellowship period is three months, which is the minimum time a fellow must commit (there is no maximum time). A \$25,000 grant is payable either to the organization or the recipient. Fellows may use the funds however they choose to support their sabbatical activities.

Application Process

An application form is required along with a personal statement, and letters of reference (3) are encouraged. Applications can be submitted in languages other than English, and the personal statement may be recorded rather than written. A selection committee, comprised primarily of activists of color, chooses the Fellows.

Orientation

Prior to 2007, Fellows received mailed materials that provided planning advice for the sabbatical. Beginning in 2007, Fellows have attended an orientation meeting.

Additional Program Features

To a limited degree, past Fellows are available to serve in a mentoring capacity. A reunion of past Fellows occurred in 2004.

Evaluation: A formative/developmental evaluation that reviews how the program is designed was conducted in 2006 and 2007 by an external consultant.

Barr Foundation: Barr Fellows Program

Goal and Inputs

The goal is to create a diverse leadership network that has an impact on the quality of life in Boston, rejuvenate outstanding executive directors, provide emergent leaders with development opportunities, and strengthen organizations in the areas of distributed leadership and succession planning. The Barr Fellows Program has funded three cohorts (2005, 2007, and 2009) of 12 fellows each. The sabbatical lasts for three months and begins with a two-week journey to the global south, which all Fellows attend. Organizations receive \$40,000, which can support a menu of options, including increased salaries for those taking on more work, contract employees such as a fund development consultant, or organization development assistance. Up to \$6,000 is made available to support each Fellow’s expenses related to global south travel and leadership coaching.

Application Process

¹⁶ This section is derived from or directly quotes the *Sabbatical Compendium*.

None. Barr selects through an anonymous process. Former Fellows, other funders, and community leaders nominate and screen applicants against a set of criteria.

Orientation: Fellows attend orientations beginning nine months before the sabbatical begins where they hear from alumni of the Fellows program and meet intermediaries—a trip facilitator, a contractor supporting interim leaders, and an evaluator. There are other informal meetings, and the twelve Fellows join a listserv within weeks of being selected.

Additional Program Features

Fellows travel together to the global south on a guided journey. Barr pays for this trip. Upon their return, the Fellows take individual sabbaticals for two and a half months. Fellows then gather in two retreats a year for the next three years to strengthen the bonding developed and the potential collaborations that can enhance quality of life in the City of Boston.

Evaluation

Outcome and formative evaluation, guided by a logic model, is conducted annually with the assistance of external consultants.

The Durfee Foundation

Goal and Inputs

Developed in 1997, the Durfee Sabbatical Program’s goal is to replenish the stores of energy and inspiration for the community’s most gifted leaders. The program has no maximum sabbatical length, however the average duration is three to four months. The foundation provides \$35,000, payable to the organization, which may include salary support, travel costs, or fees associated with professional and personal development. Six sabbaticals are provided annually; 67 have been provided to date.

Application Process

Durfee provides an informational open house and requires an application, which the applicant’s board must approve; a personal statement; and three references. The sabbatical program is open to executive directors and senior managers with a minimum of 10 consecutive years in a leadership position in the sector, with principal responsibility for implementation of mission, fundraising, and management of finances.

Orientation

The foundation hosts a separate luncheon and orientation both for recipients and secondary leaders. Recipients are paired with a program alumnus as a mentor.

Additional Program Features

Five hours of management consulting or executive coaching is available to each recipient/organization. The foundation hosts two alumni luncheons each year and a two-day retreat every other year. An amount up to \$7,500 is made available over two years to support staff development, and an additional \$2,500 is available as a pay bonus for secondary leaders.

Evaluation

A process evaluation was conducted in 2001/2002 as part of research for a doctoral dissertation. An in-house formative/development evaluation is conducted annually with each recipient cohort.

The Virginia G. Piper Charitable Trust

Goal and Inputs: The goal of the Piper Fellows program is rejuvenation and professional development for executives. The program began in 2001 and has awarded 23 fellowships to date for a maximum period of two months with an average fellowship length of one month. An amount of \$30,000 is made available to recipient organizations for salary support, travel costs, or fees associated with professional or personal development.

Application Process: There is an open application process with a requirement to submit an application form. The applicant must have approval of the board, a personal statement, and three references. Selection is done by a committee that includes one Fellow from the previous year and two community leaders.

Orientation: The foundation hosts a luncheon with current Fellows and trustees and a breakfast for new Fellows.

Additional Program Features: The foundation offers up to \$10,000 in matching funds to organizations that set aside new dollars for staff development.

Evaluation: No evaluation has been conducted to date.

Rasmuson Foundation

Goal and Inputs: The Rasmuson Sabbatical Program was founded in 2004 for the personal growth or renewal of leaders in order to combat job related stress and burnout. The sabbatical is available to executive directors and chief executive officers who work for health and human service organizations. Four to six sabbaticals are provided during an annual cycle; 15 have been provided to date. An amount of \$30,000 is made available for salary support, travel costs or fees associated with professional or personal development.

Application Process: There is an open application process, and an application approved by the board is required along with a personal statement.

Orientation: Foundation staff and an organizational development consultant meet with each recipient. The foundation hosts an annual meeting of all current and past recipients and uses this opportunity to share experience with those about to start their sabbatical.

Additional Program Features: Recipients can budget additional pay or a bonus stipend for their secondary leaders as part of the sabbatical grant budget. The foundation provides the services of an organizational development firm to each recipient and organization.

Evaluation: Formative/developmental evaluation is conducted annually with each cohort of recipients. External consultants assist with this process.

Appendices

APPENDIX A

Sources for Data

This report is based on data gathered from reviews of existing evaluations, studies, and reports; interviews of staff (at participating foundations), intermediaries, and awardees; and surveys of awardees and interim leaders. A literature review was also conducted.

Review of Existing Evaluations, Studies and Reports

Each of the five foundations provided documents for review for this study. The Durfee Foundation’s research dates from the year 2003 and provides information gathered retrospectively from 25 of the first 26 Durfee Sabbatical Program alumni (1997 to 2001). The study is in the form of a PhD dissertation conducted by Ronald Stewart. It includes a literature review on sabbaticals and details the development of its hypotheses/research questions. As a result, the study’s strengths include its going deeper in identifying various indicators that support an outcome such as “rejuvenation.” As a research study, it did not report to the foundation any recommendations for changes or improvements to its sabbatical program. The other reports did include recommendations, which are reflected in the comparative charts.

The Barr and Rasmuson Foundation reports follow Fellows/sabbatical takers in real time, rather than retrospectively. Both programs are fairly new, beginning in 2004 and 2005 respectively. Staff at the Barr Foundation developed an initial logic model—a tool that shows the relationship among inputs such as resources provided; project activities; and initial, intermediate, and long-term outcomes.¹⁷ The Barr methodology used more tools (surveys, face-to-face interviews, attendance at key meetings) to triangulate data in order to validate conclusions. However, both reports rely on the subjective reporting of the Fellows, interim leaders and in the case of Barr, board members. Barr has three annual reports, conducted by Deborah Linnell of Third Sector New England, beginning with the 2005 Barr Fellows cohort through the three year program (2006, 2007, 2008 reports) and a one year report at the end of the Barr Fellows 2007 (2008 report). Twenty-four Fellows have been followed to date. Barr plans to continue with an annual evaluation, although the lines of inquiry will focus more on connectivity among Fellows and the resulting benefits to the City of Boston.

Rasmuson’s studies were conducted by the McDowell Group and include the *Initial Report on the First Cohort* (April 2006), the *Follow-Up Report on the First Cohort* (August 2006) and the “Initial Report on the Sector Cohort” (March 2007). The reports follow 15 leaders. Rasmuson staff also gave the consultants internal foundation memos providing a view of the program’s formation and inputs. The Rasmuson and Barr studies were designed to identify outcomes from sabbaticals for leaders but also analyzed program design elements and the foundations’ respective theories of change that led to the outcomes.

¹⁷ A question for consultants’ dialogue on October 31 with funders: Has any other group developed a logic model?

The Alston/Bannerman Fellowship Program provided a study, *Internal and External Assessment*, which analyzed program design as well as inputs and feedback from 17 Fellows and 21 other stakeholders (i.e., funders who support the Alston/Bannerman Fellowship Program, present and former board members, and representatives of other organizations). Their report was strongest in broadening the perspective on results and focused more on how to improve the program from the stakeholders’ perspective. The report also followed some different lines of inquiry, given that the fellowship is designed to provide respite for community organizers of color and had less comparative information on the impacts on their organizations.

The Virginia G. Piper Charitable Trust has not conducted an evaluation or assessment to date. Its 23 Fellows were surveyed as a part of this study.

Interviews

Foundation staff most directly involved with the sabbatical program were all interviewed, using a standardized set of questions, as were consultants or evaluators to these projects. In addition, five awardees were individually interviewed, as was one interim leader. Jean McLendon who has consulted with the Z. Smith Reynolds Foundation sabbatical program for 20 years was also interviewed.

Those interviewed for this study include:

Madeleine Adamson, Alston/Bannerman Fellowship Program
Carrie Avery, The Durfee Foundation
Patricia Brandes, Barr Foundation
Saundra Bryant, All Peoples Christian Center
Michelle DeWitt, Tundra Women’s Coalition
George Hieronymous, Foraker Group
Marianne Hughes, Interaction Institute for Social Change
Maria Elena Letona, formerly, Centro Presente
Donna Logan, McDowell Group
Jean McLendon, consultant, Z. Smith Reynolds Foundation
Judy Mohraz, Virginia G. Piper Charitable Trust
Alan Nishio, Little Tokyo Service Center
Wayne Parker, Virginia G. Piper Charitable Trust
Sammye Pokryfki, Rasmuson Foundation
Ron Stewart, PhD, consultant
Chris Tompkins, Virginia G. Piper Charitable Trust
Lisa Sugino, Little Tokyo Service Center
Bill Watanabe, Little Tokyo Service Center
Tamara Woodbury, Girl Scouts-Arizona, Cactus-Pine Council, Inc.

Surveys

Surveys were sent to 126 sabbatical awardees and 61 interim leaders, with 61 and 30 responding, respectively. The survey protocols are available in Appendix B, which is a separate document available for download at www.compasspoint.org/creativedisruption and at www.tsne.org/creativedisruption.

APPENDIX B

Survey Protocols (see separate downloads at www.compasspoint.org/creativedisruption and at www.tsne.org/creativedisruption)