

## **PREPARING FOR A SUCCESSFUL SABBATICAL**

So, your board and leadership have agreed to award you a sabbatical. Congratulations! Following is a rough timeline to help you prepare.

### **6-12 Months Prior to Departing:**

Decide on the best time to take a sabbatical and put it on your organization's calendar. Schedule it so that you can make a continuous break, i.e., don't plan on being away for one month, returning for the big fundraiser, and then leaving again.

Don't shortchange yourself on time. Two months is ideal. We've learned that one month is too short, and anything more than three months can be too taxing for other staff.

Decide on your interim organizational structure. Depending on how your organization is configured, it might be a team that divides up your work, or it might be one person acting in your stead.

Develop an interim person or team job description. The job description should indicate that the interim person(s) will manage your responsibilities based on existing policies and does not have the authority to make major changes.

Create a written plan for how decisions will be made and work will be handled. Be very clear about decision-making: Is it majority rule or consensus? If someone is absent, is the rest of the team authorized to make decisions? Think through both everyday and worst- case scenarios.

Have regular meetings with the interim person(s) in the months prior to your departure to ensure open communication.

If you do not already have a personal email account, create one. If you have a personal email account, move your personal correspondence to that account.

Set aside time every week or two to plan what you are going to do on your sabbatical. If you are planning a trip, research travel destinations. Look into house exchanges. Talk to your family and friends that you are going to visit. Planning your sabbatical can be a respite in itself.

Plan a trip for the beginning of the sabbatical. The best thing you can do is get out of town right away.

If you are traveling internationally, make sure your passport is up to date and that you obtain the necessary visas. Book all travel with your personal, not your work, contact information.

When planning, keep in mind that you should not over-plan your sabbatical. Allow unscheduled time to relax. Don't transfer your Type A work performance compulsions to pleasurable activities.

### **3-6 Months Prior to Departing:**

Invite interim person(s) to shadow you in the weeks leading up to your departure. If you aren't doing it already, have interim person(s) attend program or board meetings so that staff and board can get to know one another, or get to know one another better.

Have senior staff represent your program/division/organization at the outside meetings you would normally attend.

Give detailed written instructions to your interim person(s) about whom to contact about what, where things are located, passwords, etc. These instructions will be useful long after your sabbatical.

### **0-3 Months Prior to Departing:**

Set up a strategy for when it would be appropriate for the office to contact you in case of emergency. For example, the E.D./Board Chair and interim person(s) must decide in person, face to face or on Teams, that a call cannot be avoided. Impress upon board and staff that this is reserved for true emergencies and not just troubling news or sticky situations. Part of this experience is for the board and/or staff to learn how to make decisions and act without checking in with you. Ideally you will never be contacted.

Don't try to do your work in advance, such as preparing all your grants ahead of deadline.

In the last month before you leave, have the interim person(s) make the decisions they will have to make in your absence.

Express gratitude to your staff and/or board.

Ask the E.D./board chair to pay special attention to the interim person(s) when you are gone.

Remember that nothing changes much in two months. Don't start anything new in the last month before you leave.

Designate someone to sort through your work emails, correspondence, and voicemail

and reroute them. The goal should be that you do not return to a huge pile of unfinished business, but that business as usual continues without you.

Contact key people like program partners and major funders to let them know you are going on sabbatical and whom they should contact in your absence.

Create outgoing messages for your email and voicemail that clearly state you are away on sabbatical and cannot be reached until X date. Provide information about the contact person who will manage in your absence.

If you use a mobile phone for work, leave it behind and purchase a prepaid mobile phone for use during your sabbatical.

Have a plan for how you will deal with social media. Facebook and Instagram might be a great way to stay in touch with friends, but it can be difficult if not impossible to shut out the work world. If you want to stay on social media, see about adjusting your settings to limit contact with your work world.

Have someone to call for support as you prepare, maybe another staff member outside Rethos who went on sabbatical.

### **During Your Sabbatical:**

Plan to leave town immediately, even for a short-distance trip. It's hard to resist the urge to check in when you're in close physical proximity to work, especially at the beginning.

You will be exhausted at the beginning, so don't try to do too much right away. Many people find that it takes at least two weeks to unwind.

Do whatever recharges your batteries. Maybe it's sitting and reading a novel all day, or learning to parasail, or spending time with an elderly relative. Enjoy unscheduled time. Consider spending some time by yourself.

Resist the temptation to check your work email "just for a minute," or search for news about your organization. You know that it's a black hole that will suck you in. Some organizations changed the staff member's password so that there was no way to check in.

Don't be surprised if you experience disorientation at the beginning of the sabbatical as you learn to disconnect from your work identity.

Get over the guilt of seeing the mail carrier, the teacher, the checker at the market who may ask why you aren't at work.

Even if you normally socialize with work friends or board members, take a break

from those connections during your sabbatical.

### **Your Return to Work**

Don't overbook your return – have a “stealth week” when you are back in the office but not yet making appointments and attending meetings so you can catch up without too much stress. Consider working reduced hours the first week or come back to work on a Wednesday so that you start with a half-week.

Ease back into your routine. Plan your first contacts and don't immediately start reacting to everything. Observe some of the changes that took place when you were gone.

Meet with your interim person(s) to learn what happened when you were gone, and what worked and didn't work with the new management structure. Don't be critical if they handled situations differently than you would have.

Take the time to reflect with staff about what they learned about themselves and the team. This is an opportunity for a reboot, a time to see the organization in a fresh way.

Consider whether some changes should be implemented permanently.

When you return, everyone will seem like they are moving too fast, talking too fast, making decisions too fast. You used to be like this, too. It will take time to readjust.

Don't be surprised if you experience the post-sabbatical blues. You may feel sad that your sabbatical is over or depressed to be back in the office. This is normal and may last for a few weeks. It's helpful to talk with someone else who has taken a sabbatical.

Express your gratitude to your staff and board again.

### **Life After Sabbatical**

Plan a vacation every year – something to anticipate.

It's okay to set boundaries around work. It's important for you to model this for your staff.

Stay in touch with the side of you that has nothing to do with your work – read, dance, travel, hike, see plays, listen to music, volunteer at an organization in another field.



## **Sabbatical Leave Program**

Effective institutions are guided and sustained by creative, committed and dependable people. Rethos's Sabbatical Leave Program instituted by the Board of Directors recognized that leaders need time to think, rest, reflect and rejuvenate if they are to keep their organizations and programs ahead of the curve.

Rethos recognizes that there are leaders within the various facets of our very own organization: project directors, coordinators, administrative personnel, managers, etc., who exhibit year after year the commitment, creativity, tenacity, management, and leadership qualities that help make Rethos the dynamic and organization that it is.

They exhibit these qualities on an on-going basis and sometimes under demanding conditions and often with relentless deadlines. These efforts contribute to Rethos's best practices for the betterment of our community. The demands of working in historic preservation organizations such as our own often interfere with taking sufficient time off to refresh and rejuvenate.

In an effort to create opportunities to replenish the stores of energy and inspiration for our agency's committed staff, Rethos offers the Sabbatical Leave Program as a benefit. The program will offer paid leave for a minimum of 4 weeks to a maximum of 8 weeks.

This sabbatical time will be designed by the employee and could be used for travel, study, writing, staff development, artistic endeavors, reflection, family time or any other pursuits that will enable and encourage renewal. They may not work for Rethos or take any other employment during this time.

The employee must be in good standing, an employee for a minimum of 10 years, have not requested and received a leave of any kind of more than 1 week duration (regular sick leave and vacation time exempted) such as parenting leave, maternity leave, worker's comp leave, special leave without pay etc. during the fiscal year they are applying. The eligible employee must submit an application requesting to be considered for the sabbatical leave program describing how they will utilize their sabbatical time.

### Eligibility

Candidates for this program should:

- Have worked for Rethos for a minimum of 10 years full time or 13 years part-time or is recommended by the Executive Director
- Have received positive and above average performance evaluations and deemed to be in good standing
- Not have received this award in the past 9 years or have received any other

fellowship, mentorship or special award that carries opportunities away from the Rethos through another organization or foundation within 2 years or any extended leave or extended absence from work within the past one year.

- Be an outstanding staff member who has demonstrated a track record of consistent contribution to the organization and hence to the work Rethos does in the community at-large.
- Accept the sabbatical as an opportunity to refresh and rejuvenate and as an opportunity to come back refreshed with renewed commitment.
- Be recognized by their peers and supervisors as a deserving individual.

The Candidate's supervisor should:

- Offer an endorsement of the request for leave, establish that the employee is in good standing with above average performance evaluations and authorize the sabbatical leave dates
- Approve a work plan operational during the candidate's absence, and upon the candidate's return
- Make sure that regular health and other benefits are maintained for the candidate during the period of leave

### Requirements

The primary requirement for the sabbatical leave is that the time is spent away from work. This may take the form of pleasure travel, pursuit of a vocational interest spent away or at home with one's family. The leave can combine more than one element or more than one location, but candidates should take care not to over schedule their sabbatical time. Rethos recognizes that some candidates may have a desire or need for professional development. Consequently, participation in tuition-based training programs, residencies or study time may constitute a component of an applicant's proposal.

The other requirements for the sabbatical leave are that it involves a minimum of 6 weeks paid leave taken as a totality to a maximum of 10 weeks and that awardees submit a brief written report about the sabbatical to the Executive Director who will transmit that report to the Board of Directors within two months of completion.

The Rethos Board of Directors reserves the right to change or suspend the sabbatical leave program.

### Selection Committee

The selection committee will be made up of two board members appointed by the Chair of the Board of Directors and the Executive Director. If the Executive Director is the applicant the E.D. will not serve on the committee and the board will appoint a third person from the board.

### Deadline:

Applications must be submitted at least six to twelve months prior to the proposed sabbatical. Applications with all accompanying paperwork should be submitted to the Executive Director. Applications will be reviewed by the Finance Committee. After which they will be reviewed and approved/rejected by the Sabbatical Committee.



# Sabbatical Leave Application

Please provide this application along with the requested material:

- Supervisor endorsement
- A work plan
- Please attach a letter of no more than 5 pages that addresses the following questions:

Please take the opportunity to reflect on why you do what you do here at Rethos.

1. Why are you engaged in your current field of work? Please describe your work.
2. What significant lessons have you learned along the way? How has the work impacted you?
3. What contributions or impact to you feel you have made on the organization and in the community?
4. Why do you think that this year is the best time for you to receive this sabbatical award benefit?
5. What is your plan for the sabbatical? Please describe how you will use the time to renew and rejuvenate. How will it benefit you personally and professionally?

Submit the packet to the Executive Director by the deadline date. Incomplete applications, late submissions, or faxed submissions will not be accepted or considered.

NAME: \_\_\_\_\_

TITLE: \_\_\_\_\_

PROGRAM: \_\_\_\_\_

WORK PHONE: \_\_\_\_\_ EXT. \_\_\_\_\_

HOME ADDRESS: \_\_\_\_\_  
\_\_\_\_\_

DATE OF HIRE: \_\_\_\_\_

Leave time requested:

Number of Sabbatical Weeks: \_\_\_\_\_

Vacation time (weeks) added if any: \_\_\_\_\_

Total Leave & Vacation time requested: \_\_\_\_\_

Proposed Dates: \_\_\_\_\_

Date request reviewed by Finance Committee: \_\_\_\_\_

Date request evaluated by Sabbatical Committee: \_\_\_\_\_

Committee Decision:  Approved  Not approved

Sabbatical Committee Member signature: \_\_\_\_\_ Date: \_\_\_\_\_



