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**Sabbatical Grant Checklist**

**Proposed Plan** (to be completed at time of Full Application). For any of these that do not exist, please describe the process planned, including identification of Board members/staff who will be involved in the planning, and pertinent timelines.

* Describe the organization’s temporary leadership plan.
* Identify the key executive roles/functions that will be covered during a planned sabbatical.
* What projects will need to be managed during the CEO/ED sabbatical (e.g. fundraisers, board meetings, performance evaluations, etc.)? Identify individuals who will assume primary responsibility for those projects.
* Identify the individual who will serve as Acting Executive Director
* Identify the plan to manage all documents, internal communications, and external communications requiring the executive’s response.
* Include plan for a smooth transition upon return (e.g. blocked schedule, offsite review with Acting ED and Board Chair, appreciation for staff.
* BOD explanation of limits of executive authority for the Acting E.D. and expected compensation for the and/or other staff taking on additional responsibilities during the sabbatical

**Mid-term Ratified Plan** (to be completed and submitted (via email to [Jennifer.oldham@healingtrust.org](mailto:Jennifer.oldham@healingtrust.org)) ***prior to leaving on sabbatical*** – due no later than the 6th month of grant term).

* + Update any changes to activities planned as noted in your preliminary application.
* Attachment: Fully detailed Pre-departure plan with signed approval of the pre-departure plan by Board of Directors
* Please ensure that your ratified plan includes defined limits of executive authority for the acting ED and any compensation planned for Acting ED and/or other staff taking on additional responsibilities during the sabbatical.

**Final Report** (to be completed no later than the 12th month of grant term)

* Please include the Interim leadership survey, pre-sabbatical ProQOL scores, and post sabbatical ProQOL scores