

SABBATICAL PLANNING GUIDE

THE HEALING TRUST
2023

The Healing Trust's Sabbatical Grant Program



OVERVIEW

Since 2016, The Healing Trust has funded sabbaticals for nonprofit CEO/EDs based on the firm belief that the healing and wholeness of the people who provide services matter just as much as the clients they serve. We want to exist in a world where all people live with their needs compassionately met, including the needs of rest, freedom, and joy. Sabbaticals are one tool to help meet those needs.

Our Sabbatical Grant Program is intentionally designed to be flexible with few requirements. Our hope is that your sabbatical is a period of personal and professional renewal. In that spirit, the application and reporting process follow a similar vein of trusting you know your own needs. We do not expect you to put your energy toward proving you are worthy of a sabbatical. We already know you are. Rather, use your energy to thoughtfully plan your experience, both for yourself and your team.

WE EXPECT YOU TO:

- Meet all grant requirements
 - Complete the application process
 - Complete the final report requirement (a conversation about one month after sabbatical to share insights of your experience)
 - Continue to be paid during your sabbatical
 - Receive board approval for the CEO/ED's sabbatical and interim leadership plan
 - Commit to the entire sabbatical timeframe
- Spend no more than \$5,000 on stateside travel (international travel will be approved on a case-by-case basis)
- Have limited to no organizational contact during the sabbatical period
- Return to the office gently post-sabbatical
- Integrate your experiences and share wisdom with your team
- Support the wellness of your team beyond the sabbatical period

WE DON'T EXPECT YOU TO:


- Provide receipts or proof of purchases
 - Notify us of small changes to your plan or budget
 - Provide a written final report
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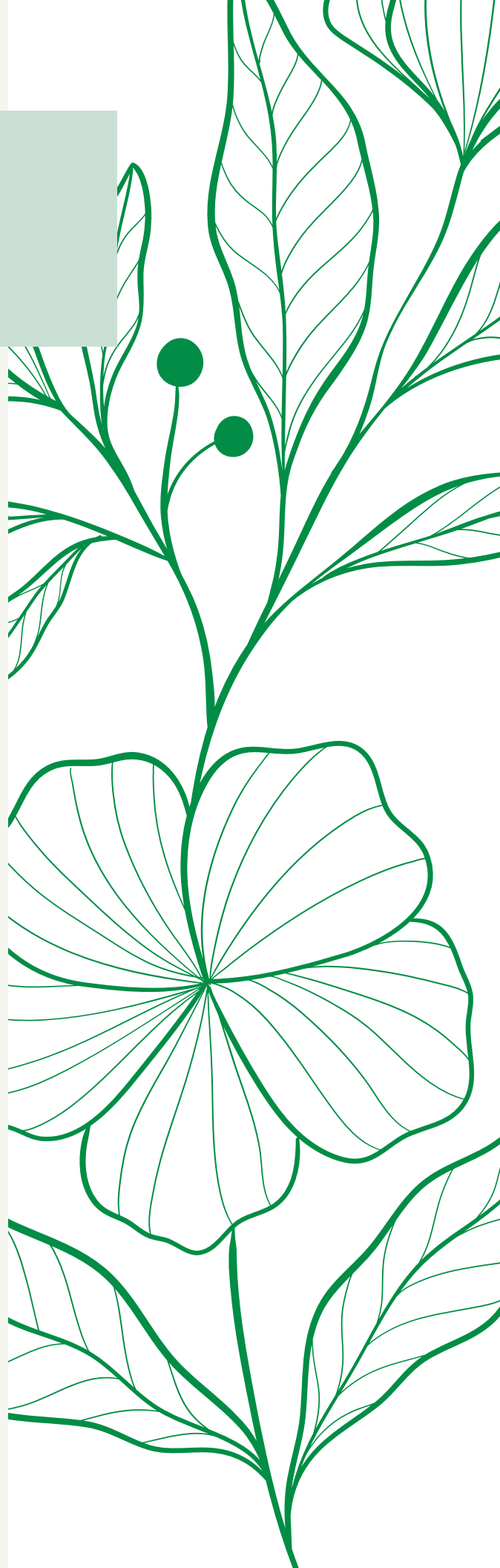
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SABBATICAL PLANNING GUIDE

Chief Executive Officers and Executive Directors (CEO/EDs) are often outcomes-driven and focused on getting things done the “right” way. While this can be helpful during your daily work, believing there is only one way to “do” sabbatical well may hinder your quest for rest and relaxation.

Repeat after me:

**There is no wrong way to
experience sabbatical.**

This guide is not designed to be a checklist. Rather, it is a compilation of suggestions to support a transformational sabbatical experience for the CEO/ED and interim staff. Suggestions are gathered from The Healing Trust’s sabbatical grantee participants who have completed the program since its founding, research on the benefits of nonprofit sabbaticals, and recommendations from other funders nationally who support nonprofit staff wellness.

Review this guide and highlight what stands out to you. Make notes in the margins. Read it again to see if something new stands out. Share with interim staff or your board chair for their feedback. If you get overwhelmed, focus on one section at a time. Make a list of what you want to incorporate, prioritize the items on the list, then take off a few tasks that you can do without.

**Trust the process, and
believe you are on the verge of renewal.**

SUPPORTED BY RESEARCH

The benefits of a sabbatical are numerous. There are more obvious benefits like retaining nonprofit leaders and putting your succession plan into practice, but the benefits expand beyond that to creating shifts in organizational culture, reinstating a visionary leader from a task-focused manager, and ultimately, improving nonprofit sustainability by first investing in the people who do the work.

The Durfee Foundation, a philanthropic leader funding sabbaticals for more than 20 years, evaluated the results of their sabbatical program and found three-month sabbaticals can be a “lever for whole systems change” as they impact the personal, structural, and systems level of an organization from experiences held by the people within the organization. Because the change comes from within the organization, rather than outside consultants, and is felt deeply as the sabbatical experience is a period of profound personal and professional development, it has the power to shift culture, change perspectives, and drive growth of an entire organization. It provides a change of pace for both the CEO/ED and the interim staff, providing a runway to new ways of engaging the work. Dreaming often begins again after a period of sabbatical.

KEY FINDINGS IN THE DURFEE FOUNDATION'S RESEARCH:

- Rejuvenated leadership that reports greater confidence, improved personal and professional relationships, and new vision and passion for the work
- An increase in organizational capacity as the leadership team shares and understands the work in new ways
- Succession planning in practice, providing a dry run to test if leaders are interested and capable of the CEO/ED position
- Strengthened board governance through participation in planning and supporting staff throughout the process

While the common fears are often “Will the organization survive without the CEO/ED?” and “Will the CEO/ED decide it is time to move on?” research shows that when they go on sabbatical, they are more likely to remain in their position or extend their tenure. For those who choose not to return, this experience provides a short period to test what is next for the organization.

Read more about the findings from research on nonprofit sabbatical programs including [Creative Disruption: Sabbatical for Capacity Building and Leadership Development in the Nonprofit Sector](#) and [From Creative Disruption to Systems Change: A 20-Year Retrospective on the Durfee Foundation Sabbatical Program](#).

ANTICIPATE BIG FEELINGS

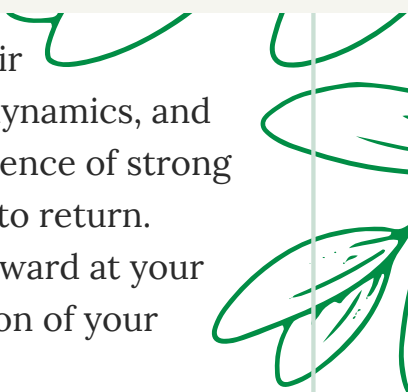


*“If you feel like you can’t do it, you must do it.
If you are fearful, you need to do it.”*

-Linda Leathers, The Next Door

2018 Sabbatical Grantee

Everyone’s sabbatical experience is unique and influenced by their organizational size and structure, personal life stage and family dynamics, and activities planned. However, it is common to experience the presence of strong emotions throughout each stage of the sabbatical from planning to return. Without your normal routine, you may find yourself looking backward at your life experiences, forward at your dreams, and making an evaluation of your contentment with it all.



Many CEO/EDs report guilt in the pre-departure phase and anxiety during return. One participant described it as “walking off a cliff”. Some experience sadness during the beginning of the sabbatical period. One participant spoke about crying without knowing the triggers as they began to encounter unprocessed grief. Another participant spoke to feeling anxiety and overwhelm, unsure where they’d fit in when returning to the office.

Even with these uncomfortable emotions, all participants speak to pockets of unbridled joy, newfound clarity, and renewal of spirit found on their sabbatical. Sabbatical grantees have used the words “transformational,” “invaluable”, “freeing” and “awake” to describe their experience. It provides space to begin anew. As with other experiences in life, the process of becoming free often is accompanied by highs and lows that ultimately create a rewarding experience.

Incorporating additional support from the planning phase to return phase can be helpful, whether that is an executive coach, mentor, or therapist. During this period, treat yourself as you would your most precious loved one and develop a plan for your care.

SABBATICAL REFLECTIONS

HOW AM I FEELING RIGHT NOW?



Hurt



Lonely



Anger



Sad



Fear



Shame



Guilt



Glad



Other

What feelings arise when I think about taking a sabbatical?

Where do I feel that in my body?

What might I need to feel ready to enter a period of rest and renewal?



Pre-Sabbatical Planning

Once you commit to pursuing a sabbatical, it is time to begin planning. This process typically takes 4-6 months, depending on the runway you have before your sabbatical begins and the policies and procedures you already have in place in your organization. A valuable suggestion made by most sabbatical grantees is to speak with past participants to hear their experiences and recommendations firsthand. If this interests you, we are glad to connect you. Consider putting this at the top of your to-do list before diving too deep into the rest of this guide.

The planning period includes both **preparing your team** and **preparing yourself**. Neither is more important than the other, and intentionality should be devoted to the planning of both components of this experience.

This guide only provides suggestions. Take what works for you and your team and leave the rest.

TIMING

TAKE THE TIME YOU NEED.

“Do it, but make sure the timing is right.”

-Katina Beard, Matthew Walker Comprehensive Health Center
2021 Sabbatical Grantee

The timing of your sabbatical is important. Although there will never be a “perfect” time, selecting a period you can take a continuous break is necessary. It shouldn’t be during an organizational or financial crisis, a period with significant contractual obligations, or a period with other major transitions with board, staff, or programming. The expectation is to completely unplug—no checking work emails, swinging by the office, or attending fundraisers. Consider this when selecting the appropriate time for your sabbatical. You may also consider what makes sense with your personal life and family needs.

**Remember, your sabbatical is for you—
your rest, relaxation, and rejuvenation.**

Although you may choose to spend time with loved ones, it is helpful to ensure you have adequate support for any caretaking duties you may have so your energy doesn’t move from managing an organization to managing the daily lives of your family. It is important to find balance between being with others and being with yourself on sabbatical.

Three months is an ideal timeframe as it provides space to fully disengage. Sometimes, it takes time for the mind and body to settle into the pace of sabbatical, which is much slower than the day-to-day of leading a nonprofit. Anything more than three months can be taxing on the staff. Because of this, small organizations with few paid staff may benefit from shorter sabbatical and are approved by The Healing Trust on a case-by-case basis.

Sabbatical is a unique experience. Lean into it by taking the time you need. It is unlikely you will have an experience like this again, so take full advantage of the experience ahead of you.

LEADERSHIP STRUCTURE & PLANNING

Our sabbatical grantees have reported a more positive sabbatical experience when their interim team was supported and well-prepared. Having the appropriate structure and supports in place for your team during your absence will allow you to disconnect fully. Trusting your staffs' ability to accomplish the work provides peace that the organization does not live and die by the CEO/ED's oversight. Some teams choose to divide the work among top leadership, some choose to select one person to fill the interim CEO/ED role, and others decide to hire support on a contract basis.

The following suggestions may be helpful when preparing your interim leadership for the transition of duty:

- Provide coaching or other professional development opportunities for interim staff to fill the gaps in their understanding. Some past participants suggest using a different coach for the CEO/ED than the interim staff.
- Provide personality tests for interim staff and disperse results with the team as an activity in understanding leadership approaches and styles. Note differences between your style and that of the interim leadership.
- Develop a job description for the interim staff and be clear about what each position has authority to do and not to do. Make sure your staff understand the distribution of duties and who to contact with their questions during your absence.
- Develop a plan for decision-making in both best case and worst-case scenarios.
- Train your interim staff over time and ensure open communication prior to departure. Have interim staff shadow as part of their training.



Working With Your Board

Engage your board in the sabbatical planning. Their participation in this process can be used as a development experience for improving your organizational governance.

You must receive your board's full approval for your sabbatical as a requirement of this grant. Inform your board of the benefits of experiencing a sabbatical—more creativity, more energy, more clarity. Not only will the CEO/ED benefit, but so will the staff as they flex their leadership muscles in the CEO/EDs absence. You may be surprised how supportive the board is.

Discuss the role the board plays in supporting the staff. Make the lines of communication and the expectations clear. Don't forget to emphasize that the board also should not contact you during the sabbatical period. Remind them that most emergencies are not true emergencies.

Ensure key board members are available to provide support to staff during the sabbatical period. This may be critical depending on the size of your staff and the nature of your board. Consider creating a board liaison for the staff. Have staff attend board meetings prior to the sabbatical period so the board and staff can get to know one another.

Develop a plan to announce your sabbatical with key stakeholders and clients. Consider having the board chair send an email of support. Some past participants suggest informing the community you'll be back a week later than you actually plan to return to provide a grace period for a supportive reentry.

Discuss salaries and bonuses. As a requirement of this grant, the CEO/ED should continue to be paid their regular salary during the sabbatical period and additional compensation should be provided to interim staff who take on additional duties. Compensation for interim leadership, as well as other supports, can come from the grant funds.

LOGISTICAL & TACTICAL

Preparations

- Save all important passwords in one document and share with key interim leadership.
- Have interim staff change the password to your email and other key communication or project management tools you use (i.e. Teams, Slack, Asana, Monday). This way, you won't be tempted to login and see what is going on.
- Create guidelines around when you may be contacted in an emergency. Decide what constitutes an emergency. This isn't just bad news. Ideally you will not be contacted at all.
- Create an email management strategy for the sabbatical period. Designate someone to sort through your emails and other communications so your inbox isn't too overwhelming and only necessary communication is present upon your return.
- Create a document management strategy. Help interim staff prioritize tasks and updates that will need to be shared or signed upon return.
- Consider what you see on social media. Do you need to temporarily unfollow work related accounts or could you take a break from social media altogether?
- Work with your finance team or tax adviser to determine the best way to disperse the grant funds from organization to CEO/ED, so the CEO/ED is not personally taxed.

Pre-Sabbatical Planning Reflections

TIMING

Why now?

LEADERSHIP STRUCTURE & PLANNING

*What 3 things do I want to
explore to help prepare
my team?*

WORKING WITH YOUR BOARD

*Who on my board will
champion this experience
for me?*

LOGISTICAL & TACTICAL PREPARATIONS

*What 3 things do I want to have
in place prior to my sabbatical?*

Planning Your Sabbatical Experience

Planning what you will do on your sabbatical is an important part of the experience. Consider what brings you joy and balance, and activities you've always wanted to try. This is time to dream and take the risk of trying something new—there will be no test of your proficiency in a new skill when you return. It's okay to try something new and decide it's not for you. Set time aside weekly leading up to your sabbatical to research, plan, and make reservations.

You may find it helpful to set intentions for your sabbatical. Prior to planning ask yourself:

- *How do I want to feel on my sabbatical?*
- *What makes me feel cared for and grounded?*
- *Outside of accomplishing projects, what will I consider a successful or complete sabbatical experience?*

Participants who have gotten the most out of their sabbatical experience create a loose plan that isn't overly scheduled. There is time to breathe, to make choices each day, and not be dictated by a calendar. Providing space—*breathing room*—in your plan allows for opportunity to respond in the moment to your needs and desires. Many participants are surprised by the emotional experience they have on their sabbatical and providing room to be curious about what they are feeling creates a richer experience.



**“Keep it simple.
Do not try to pack too
many things in.”**

**–Katina Beard, Matthew Walker
Comprehensive Health Center**



Planning Your Sabbatical Experience

You may consider adding activities in these categories when developing your sabbatical plan. The hope is this list will help you begin to dream, knowing you can pursue activities outside of this list.

Travel

It can be helpful to start and end your sabbatical with travel. When you begin with a trip, you immediately pull yourself out of your normal schedule. You may find it helpful to be en route to a beautiful destination on the first Monday of your sabbatical to help turn down the chatter in your mind about what's going on in the office. Similarly, ending your sabbatical with a restful, low-energy travel experience allows you to wrap up in a celebratory way. Please note we limit \$5,000 of the funds toward stateside travel. Funds used for travel outside the United States are permitted on a case-by-case basis.

Retreats

Consider going to a retreat center for solitude and reflection. This can be an entryway to experiencing a solo trip if you are seeking intentional alone time but do not want to travel from place to place.

Hobbies

Dive into a hobby you've neglected or pick up something new. You can use grant funds to purchase supplies, lessons/classes, etc.

Projects

Complete a project around the house you've had on your list for a while, if it is something you find enjoyable or will bring you peace of mind. These should not be work-related projects!

Wellness

Pursue experiences or routines that will benefit your physical and mental health. This can be a wide array of activities depending on what you find restful and supportive.

Personal Work

Consider working with a coach or therapist to process woundings, griefs, or challenges that get in the way of your ability to show up the way you want to in the world.

New Experiences

Is there something you've always wanted to do but didn't have the time or resources to do so? Now is the time to give it a try. Take the class, book the excursion.

ACTIVITIES FROM PAST PARTICIPANTS

You have flexibility to determine what you want to experience on your sabbatical. **However, we ask that you do not do anything work-related.** Please do not draft new policies for your organization, reimagine your leadership structure, or other projects of that nature. Your “duties” during the sabbatical period are to rest and be renewed. When you return, you can dive into those projects.

Examples of activities from past participants:

- **Travel:** road trips, beach vacations, mountain adventures for skiing or hiking
- **Retreats:** spiritual/faith retreats, silent retreats, yoga retreats, emotional healing retreat
- **Classes/lessons:** baking, golfing, hair/make up, vocal, swim, art, dog training
- **Home projects:** screen in porch, fix a perpetually leaky faucet, organize closets, declutter
- **Wellness:** work with a nutritionist or personal trainer, acupuncture, massage, spa, float therapy
- **Family:** college visits, spend time with aging parents, visit homeland, learn about your ancestry
- **Healing work:** coaching, talk therapy, art therapy, equine therapy
- **Health:** catch up on doctor's visits, go to the dentist
- **Reading/learning:** get a library card, take an online course for fun, watch documentaries

*“I focused on my health for the first time in a decade.
It was amazing gift. I flourished in all areas of
my health.”*

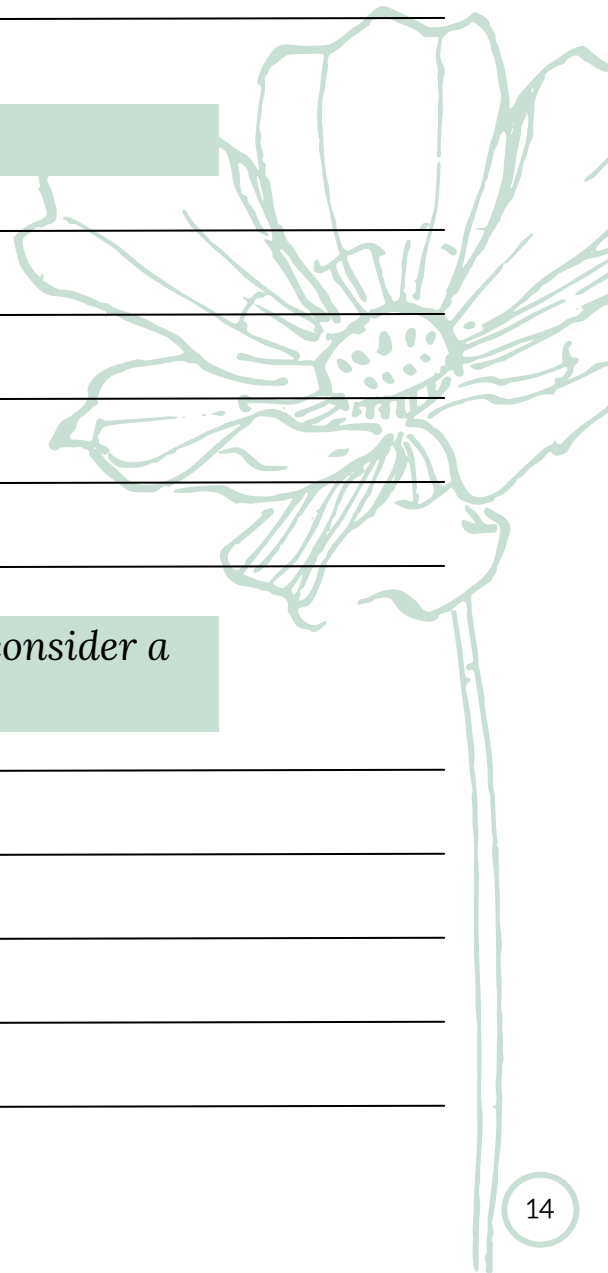
-Sabbatical Grantee

Pre-Sabbatical Planning Reflections

How do I want to feel on my sabbatical?

What makes me feel cared for and grounded?

Outside of accomplishing projects, what will I consider a successful or complete sabbatical experience?



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PRE-SABBATICAL REFLECTIONS

*Use this page to freely reflect before
your sabbatical experience.*

15

PRE-SABBATICAL REFLECTIONS

*Use this page to freely reflect before
your sabbatical experience.*

15

DURING SABBATICAL

“Lean into it.”

-Julieanna Huddle, CASA Nashville

2021 Sabbatical Grantee

This is the time to truly lean in. You’ve thoughtfully put proper structures in place so you can let go for the sabbatical period. The day-to-day at the office is not your responsibility to manage at this time—let the person who does hold the responsibility do the job. Trust they are doing the best they can, and together the board and staff can figure out any curveballs.

As you are able, disconnect for this period from relationships that are work related. Your colleagues know you are enjoying a sabbatical experience and won’t find it rude. They will be there upon your return eager to hear about your experiences.

It may be challenging at first, but eventually you will get into a new rhythm and may be surprised how much you like it. Some find it takes time to let go of the grind that comes with the CEO/ED role. You may be incredibly tired. Give into it and rest.

Loosely follow your sabbatical plan and listen to your needs and desires to determine the day’s activities. If you need a plan, plan for unscheduled time. You may discover interests you long forgot you had. You may become energized and creative. Listen to what your body tells you and follow its lead.

Just prior to the conclusion of your sabbatical, begin reflecting on how you want to show up in your return. This is not an invitation to put back on the CEO/ED hat and “get to work”, rather this is a time to consider how you, a mission-driven person who does meaningful work, will return in a way that honors your sabbatical experience.

Reflect on the following questions:

- What are my hopes going forward in my career?
- How am I different because of this experience and how will I integrate these differences?
- How can I prioritize my rest and peace as I return to the office?

Every sabbatical grantee has lessons to learn. Common lessons include discovering their personal identity versus work identity; learning how to rest, relax, and play; letting go of fear and perfection; and addressing their sense of responsibility for the wellbeing of others. Know you are not alone as you discover what wisdom this experience shares with you.

03

SABBATICAL REFLECTIONS

What are my hopes going forward in my career?

How am I different because of this experience and how will I integrate these differences?

How can I prioritize my rest and peace as I return to the office?



REFLECTIONS

*Use this page to freely reflect during
your sabbatical experience.*

[illegible]

LIFE AFTER SABBATICAL

Returning to the office after a sabbatical can be challenging. It is an adjustment for yourself, your family, and your team.

Having boundaries and plans in place to support your return, as well as realistic expectations, can help create a smoother transition back.

Past sabbatical grantees have spoken to experiencing a variety of emotions when reaching the return phase. Some participants have described the feeling as the mix of nerves and excitement that come before the first day of school after summer vacation. Others say they had feelings of overwhelm and dread knowing the pace they were returning to is much faster than their sabbatical. A handful of other participants describe feeling energized, humble, and grateful.

SUGGESTED GUIDELINES FOR RETURNING TO THE OFFICE

EASE BACK IN.

Some past participants have found their reentry was the most difficult part of their sabbatical. Putting guidelines in place for your return and communicating those guidelines to your board and staff prior to departure can aid in a smooth transition.

An important piece of advice: plan a gradual reentry and return of duties.

There is no need to do it all at once. Ease back in. If you are overwhelmed, it will be harder to do good work and hold on to what you learned on your sabbatical. You may consider incorporating some or all of the following suggestions into your return plan.

01

FIRST 1-2 WEEKS BACK

- Work limited hours (i.e. half day, return on a Wednesday)
- Work from home a couple days before returning to the office
- Don't schedule any meetings or appointments so you can focus on reviewing emails, calendars, etc.
- Connect with 1 or 2 key staff members before connecting with the full staff/board for an overview
- Avoid major events, fundraiser, deadlines
- Continue delegating tasks to interim staff

02

2-3 WEEKS BACK

- Intentionally celebrate the work done in your absence and praise interim staff with lunch, staff outing, party, etc.
- Share your reflections and insights broadly with the team
- Have one-on-one meetings with interim staff
- Begin one-on-one meetings with key board members
- Meet with coach/mentor/therapist

03

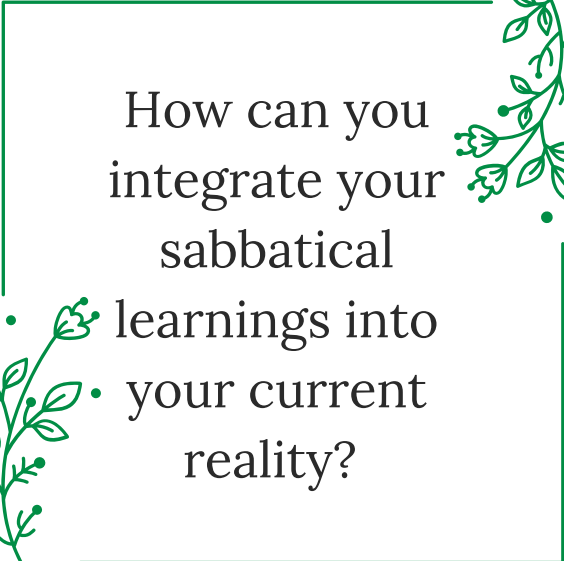
ONE MONTH BACK

- Continue to meet with coach/mentor
- Continue one-on-one meetings with staff
- Begin evaluating the organizational impact of the sabbatical and make a plan for changes
- Meet with The Healing Trust for a final check-in conversation

INTEGRATING YOUR EXPERIENCE

Continue to reflect on your experience in the months following your sabbatical. You may continue to discover new wisdom as you return to the rhythm of work.

- *What insights did you gain personally and professionally?*
- *What did you learn about your leadership and personality?*



How can you integrate your sabbatical learnings into your current reality?

Continue to be curious about the lessons you learned on your sabbatical and find ways to integrate your learning, such as:

- Taking PTO for your personal rest, not to attend appointments or take care of others
- Planning a yearly vacation or extended period of time off
- Setting boundaries around work time (i.e. when you'll answer communications, how late you will stay in the office, working from home a couple days a week, etc.)
- Continuing to enjoy the hobbies or activities you started on your sabbatical that have nothing to do with your work identity
- Continuing to work with a coach, mentor or therapist

INTEGRATING INTERIM STAFF EXPERIENCE

RECONNECT & REFLECT.

Encourage your interim staff to reflect on their leadership experience during the sabbatical period. Provide opportunities to share their reflections and integrate feedback as an organization. This is useful for the development of the interim staff, CEO/ED, and the organization. Together, you can decide what changes to keep and what was helpful only for the sabbatical period. This is a practice of honoring what was learned in your absence and can lead to incredible growth.

Past sabbatical grantees recommend conducting re-entry meetings with key staff to share reflections, successes, and growth areas from both the CEO/ED and staff. Scheduling meetings with key interim leaders over time, rather than all at once, can help prioritize important tasks and reduce overwhelm. You may consider meeting with any board members who provided additional support during this period.

REFLECTION

Consider having interim staff reflect on:

- *What gifts or strengths did we miss of the CEO/ED during the sabbatical period?*
- *What was refreshing or supportive from the interim staff leadership that could be integrated beyond the sabbatical period?*
- *How did I grow in the interim role? What pushed me and what felt natural?*
- *Are there outstanding issues, disputes, or concerns that need to be addressed?*



IMPROVING STAFF WELLNESS CULTURE

After having this experience, many participants speak to wanting to offer something similar to their staff. There are a variety of ways you can support and prioritize the wellness of your team. One significant way is implementing a staff sabbatical policy. Of course, that isn't the only way. You may also consider implementing a robust PTO policy, providing a significant Health Savings Account contribution, or providing a self-care stipend for team members to spend on their wellness. A good place to start is asking your team what would support their wellbeing and then formally adding that into the organizational policies and procedures.

***People create the culture of an organization.
Together you can shift the way your
organization works and rests.***

It is important for the CEO/ED to continue to model this approach when returning to the office for staff wellness to improve and the culture to shift.

Interim Staff Post-Sabbatical Reflections

What gifts or strengths did we miss of the CEO/ED during the sabbatical period?

What was refreshing or supportive from interim leadership that could be integrated beyond the sabbatical period?



Interim Staff Post-Sabbatical Reflections

*How did I grow in the interim role?
What stretched me and what felt natural?*

*Are there outstanding issues, disputes, or concerns
that need to be addressed?*



CEO/ED

Post-Sabbatical Reflections

What insights did you gain personally and professionally?

What did you learn about your leadership and personality?

CEO/ED

Post-Sabbatical Reflections

How am I different? How am I the same?

What do I want to share with my team?

NEXT STEPS

Ready for a sabbatical?

Contact Abby Hyman at
abby.hyman@healingtrust.org
to start the conversation.

About The Trust

The Healing Trust's mission is to support and partner with communities to advance racial equity and eliminate health disparities through advocacy and strategic investments.

Our geographic funding area includes Bedford, Davidson, Maury, Montgomery, and Rutherford counties of Middle Tennessee.

Learn more about The Healing Trust and the specifics of the Sabbatical Grant Program at www.healingtrust.org.



Thank you to our grantee
partners who shared their
personal insights and
reflections to support future
sabbatical participants.



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