

## MIND THE GAP: A SABBATICAL CASE STUDY

### CENTER FOR NONPROFIT EXCELLENCE

*September 2018*

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#### EXECUTIVE SUMMARY

Cristine Nardi, Executive Director of Center for Nonprofit Excellence (CNE), enthusiastically described her sabbatical: the uninterrupted time with her family, the personal adventure, the support of her board and her staff, and the chance to take a mental break from the day-to-day work of managing a dynamic organization that supports and strengthens a robust community of nonprofits:

*“The sabbatical added at least 5 years to my tenure at CNE. CNE was not on my agenda during the sabbatical. I completely unplugged, and yet when I returned I not only came back to the job with renewed energy, I also was able to solve strategic puzzles that had eluded me before I left and apply new ideas to old challenges. So CNE evolved with me. I am grateful daily to have had the opportunity.”*

Kakie Brooks, CNE’s current Board Chair, framed the unique and valuable investment in leadership that the sabbatical offered:

*“It was immediately obvious to me when Cristine returned after her sabbatical how valuable the experience had been for her. She came back to work with fresh energy, a broad perspective on the challenges and opportunities of the CNE’s rapid growth, and an inspiring focus on deepening the organization’s commitment to diversity, collaboration, and leading practices on all levels.”*

In this case study, we explore CNE’s executive sabbatical experience: the opportunities and challenges it presented, how CNE prepared for it, and the lessons learned. We include as appendices several resources that CNE used to manage the sabbatical. At the end, we offer a discussion guide for boards and staff members considering sabbaticals as a tool for leadership development, creative compensation, and staff retention, understanding that the decision is a nuanced one within any organization and that there is no “one size fits all” sabbatical policy or practice. We also recognize that nonprofits can and do consider and support sabbaticals for staff regardless of their position in the organization, and provide resources for nonprofit staff sabbaticals as part of this case study.

**HIGHLIGHTS:**

- **Make a plan:** Plan for all 3 phases of a sabbatical: preparation, implementation and reentry. Engage each role – staff, leadership, and board – in the planning. Communication across the organization is critical before, during, and after the sabbatical.
- **Interim leadership:** Strong interim leadership, either by current staff or a trusted board member or outsider, is critical during the sabbatical. If a current staff member will serve as interim leader, revise job descriptions and expectations during the sabbatical period.
- **Board in action:** The board plays a key role in the spirit, planning, and implementation of a sabbatical. Board leadership may take on a slightly different, more operations-focused role during a sabbatical.
- **Leadership development:** Identify leadership development goals for staff who take on different responsibilities during the sabbatical, and ensure that staff have support from the board, other staff members, and/or outside advisors in achieving identified goals.
- **Creative compensation:** In recognition of the interim leader who steps up from within the organization, provide a bonus, offer additional paid leave post sabbatical, and consider a new title or promotion once the executive director returns to her position, assuming the interim stint is successful.
- **Leadership transition and organizational growth:** A sabbatical can be a learning opportunity that informs, and in the case of CNE, quickens subsequent staff transitions. Changing leadership offers opportunities for creative disruption and can provide important growth opportunities for staff and board.

**LESSONS LEARNED:**

- **Stewarding relationships:** Transitioning processes and projects is easier than transitioning relationships, particularly those of a long-time executive director. When possible in the lead up to the sabbatical, have interim leaders join executive directors in meetings with key stakeholders; be intentional about building the interim leader relationship with key stakeholders.

- **Engaging in active communication:** Be proactive and personal when educating donors and key stakeholders about the sabbatical; engage major donors in individual conversation where possible to learn of any unique questions, concerns, or issues in real time. Expect different levels of understanding and opinions on the value of a sabbatical to an organization. Share with your closest constituents the learning and growth that takes place throughout the sabbatical process.
- **Recognizing professional development:** When staff take on the role of interim leader, be prepared for the fact that the experience might accelerate their decision-making about their own career trajectory, which could cause them to leave the organization.
- **Managing reentry:** Reenter the organization slowly and with intention. Before diving back into the work, leave time and space for learning from those who managed in your absence: how it went, how they felt, and how they see the organization moving forward. Expect that there might be some friction as you manage the transition back to leadership.

For advice on *When Not to Take a Sabbatical*, and other first person answers to frequently asked sabbatical questions, see [Sabbatical Tip Videos](#), Durfee Foundation.

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**BACKGROUND:**

During the summer of 2015, CNE’s executive director took a 10-week, paid sabbatical during which time she was not in touch with CNE – no email, no phone calls, no work projects, no meetings. While she was on sabbatical, CNE’s director of programs and director of philanthropy took on the challenge of representing CNE as interim co-executive directors. The board chair and vice-chair met weekly with the co-executive directors to help steward the organization, and the staff rallied together to support each other and the interim leaders. For example, thanks to a board member who offered the tickets, staff went together to a semi-professional baseball game one evening over the summer. Staff also restructured the team’s weekly staff meeting for more cross-organizational information-sharing and support.

*“I wouldn’t have proposed a sabbatical if I didn’t think we had the right staff and board team to make it work. In addition to the personal value, I also felt strongly that a CNE sabbatical could generate valuable research and learning for our nonprofit members in the region.”*

-Cristine Nardi, Executive Director

The Executive Director proposed the sabbatical a year in advance. The CNE board then spent several board meetings

*ATTRACTING and retaining talented employees for a nonprofit is critical, and with resources always in short supply nonprofits can and should explore creative approaches to compensation. A sabbatical – whether for family time, education, or retraining – can be one tool in the leadership toolkit for the long-term vitality of a nonprofit. This case study documents CNE’s experience with an executive sabbatical, but sabbaticals can be offered to all staff.*

*DURING the time the Executive Director took her sabbatical, CNE did not have an executive or staff sabbatical policy; the organization is now in the process of creating a written sabbatical policy that will apply to all staff. See **Appendix A** for examples of [nonprofit sabbatical policies](#) for executives and for staff.*

discussing the proposal. While all board members were inclined to support the executive director's request, there were some less familiar with the concept. For example, board members working in the corporate sector initially had questions about the cost and efficacy of a sabbatical.

The discussions, which proved both productive and educational, focused on the impact on the organization operations if it were to approve the sabbatical, including how to continue exceptional service, the financial and human cost and benefit, how to support employees, and what messages need to be sent to donors. The emphasis of the discussion was on the value of Cristine as Executive Director, the creative growth opportunity for staff, the deeper engagement opportunity for the board, and the broader value of a case study to inform other nonprofits about how to plan for and manage gaps in leadership staff.

Six months after the proposal, the board approved a flexible ten-week paid sabbatical recognizing the executive director's seven years of dedicated service, as well as the interim leadership plan. The executive director and board leadership agreed on an informal goal that the executive director remain with the organization at least two years post sabbatical, provided employment continued to be of mutual benefit.

Past Board Chair Joe Raichel, Senior Vice President, Western Virginia Business Banking Manager, Wells Fargo, recalled his experience with the sabbatical:

*“When the sabbatical idea was first discussed, I was very skeptical. I had no experience or context to judge whether it was a good idea or not. In retrospect, I think it was one of the best and most important decisions we made as a board. I attribute our success to the following: First, we planned well in advance to give all stakeholders a chance to give input, and to prepare the organization for the sabbatical. Second, we committed ourselves to complete transparency and objectivity to the immediate results of the sabbatical. Lastly, we measured outcomes long after the sabbatical. I would urge any nonprofit to have the courage to explore whether a chief executive sabbatical is right for the organization, and to study how CNE and other nonprofits have executed successful sabbaticals.”*

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## THE PLANNING:

**Staff implementation** “No, no, no, was my first reaction,” Marisa Vrooman, the Director of Philanthropy, shared as she remembered the initial discussion. Not an unexpected staff reaction when first considering a significant leadership change and the potential for extra work. The executive director and the leadership team now had the advantage of six months of planning time to define the process.

To start, the team sourced a sabbatical planning guide: [Sabbaticals: A Checklist for Preparing Managing and Re-entering, Compass Point Executive Transitions \(Appendix B\)](#). This tool outlines decisions and discussions necessary for organizations considering sabbatical. The team began weekly discussions to determine specific responsibilities and roles.

CNE developed a [staff survey](#) to inform preparations and consider any concerns. (Appendix C). Understandably, the survey results reflected concerns regarding how best to cover the executive director’s functional responsibilities.

For more information about how to effectively plan and execute a sabbatical, see [Appendix A, Do-It-Yourself Sabbatical Guide for Nonprofits, with Sample Policies](#), Durfee Foundation

The survey comments also reflected the anticipated opportunities for creativity, new connections, and fresh energy through change. Comments included: “CNE will be ready for any transition or succession” and “More room for the directors to develop their own problem-solving capabilities, particularly in external relations.”

CNE identified Co-Directors Cindy Colson, Director of Programs, and Marisa Vrooman, Director of Philanthropy, as the leadership team to guide the organization through the process. For CNE, these two staff members brought strong nonprofit experience and would bring confidence to the plan. Cindy and Marisa worked well as a team, and their collaborative style provided a great platform for partnership in decision-making. Cindy noted that “The weight of taking on the additional responsibility was balanced by the support of our partnership.” Cristine noted that “With Cindy and Marisa, we were ready with experience and confidence that this process could be seamless for our members and other key stakeholders.”

**Donor communication** was an important element of the CNE implementation plan. As any nonprofit knows, donors closely watch operational spending and administrative costs. The team realized that miscommunication about an executive director sabbatical could create confusion, or worse, concern about the organization.

A series of ***specially-crafted messages*** were created to send to donors before, during, and after the sabbatical. One board member noted, “We were very cognizant of the donor emphasis on efficient operational expenses. Our goal was to communicate the long-term investment in our leadership. Losing leaders with critical experience and motivation can have cost and impact far beyond this investment in a short-term in sabbatical.” See [Cost of Employee Turnover vs. Retention Proposition \(Appendix D\)](#). Emails and updates to constituents noted the goals for the sabbatical, the commitment to uninterrupted service, and the anticipated opportunity for creative growth within the organization.

***The board*** explicitly acknowledged its leadership role in achieving the identified goals for the sabbatical: ***reenergize a strong executive director, build staff ‘bench strength’, and deepen the boards’ governance engagement***. The board also was genuinely committed to the opportunity to model a sabbatical to provide valuable knowledge and lessons learned to other nonprofits.

The board was very specific about its action plan for the sabbatical. The chair and vice-chair of the board committed to weekly meetings to provide support and troubleshoot as needed. While CNE was due for some strategic planning, both the board and staff agreed that it made more sense to engage in longer-term strategy development upon the executive director’s return given that the goals set for the sabbatical would be important factors in any new strategy.

*“I recall that, as a board, we were deliberate in keeping the focus off of long-term strategic issues while Cristine was gone, but instead on our commitment to ensuring that the daily work of the CNE continued with excellence during that time.”*

-Kakie Brooks, then Vice-Chair of the Board

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## THE IMPLEMENTATION:

***The Board and Co-Directors*** Joe Raichel, CNE’s Board Chair, came to CNE on the first day of the sabbatical. “It made a real difference to see this board support and talk with Joe in person especially on the first day,” said Marisa. Board members each made a point to be accessible and to offer input as needed. “Seeing and hearing their active support helped us to feel empowered to manage the organization.”

The most important interim goal was to ensure effective ongoing operations, but the sabbatical also yielded knowledge and skill development for Cindy and Marisa. “The

sabbatical offered us a great opportunity to **'be the face of CNE'** and to create new relationships with the board and staff," Marisa explained. "We were excited for the chance to figure it out as a team." Staff would need this energy to adjust to the new normal during the sabbatical.

Cindy noted, "The weekly calls with the chair and vice-chair created a great partnership for managing the current demands and decisions, and also helped to grow our confidence and approach to new ideas."

For example, a strategic partner opportunity – to develop a pilot program in a new geographic location - presented itself during the executive director's absence. Although this represented a potential strategy shift, the board and staff made the decision to pursue the pilot. Although the timing was not ideal, the opportunity was.

***A strong board- staff partnership is critical to managing operations during a sabbatical.***

*"I certainly noticed an uptick in our board's engagement during Cristine's sabbatical. As one would expect, some board members put in more time than others to helping steward the organization in Cristine's absence, but everyone recognized the need to focus their attention on the health of the organization during the sabbatical. We all understood that this was an experiment and that in undertaking this ED sabbatical, the CNE was making good on its commitment to being a learning lab for our entire local nonprofit sector."*

-Kakie Brooks, then Vice-Chair of the Board

***Co-Directors and the Staff*** Each of the employees spoke of their admiration for the co-directors during the sabbatical. One staff member noted that their "maturity, ownership, and accountability provided confident leadership. These are leaders who set very high standards for themselves, and their dedication showed."

Critical to the process was a ***new approach to the weekly staff meetings***. The team was aware of the expanded need to communicate, to share responsibilities, and to ensure high quality service. A new meeting format and agenda developed to share broader leadership questions and allow more sharing across roles. Staff reported that the new meeting structure provided a better view of the big picture and how decisions are made. A staff member noted, "I really like this inclusive format; it allows for more growth in my skills and perspectives to contribute to these discussions."

For some of the staff, it was business as usual to continue the day-to-day work of the organization. Other than the roles of the co-directors, the work turned out to be

manageable and the impact on overtime was minimal. Valerie Washington, Finance and Operations Manager, noted, “I didn’t see much impact other than my shift in reporting to the co-directors. I did see some of the stress on Cindy and Marisa in those new roles. I think ‘we did it right.’ The executive director role is a very hard job, and the sabbatical time was well-invested for our leader to come back refreshed and energized.”

Both co-directors noted that the opportunity for growth and learning during the sabbatical was energizing, but overall it was a lot of work. Board members helped with the extra workload through their warmth and availability. “If approaching this type of leadership gap,” Cindy noted, “I would recommend being strategic and realistic about the additional workload. Even with talented staff, this is not the time to take new initiatives. Our board did a great job of supporting a reasonable slate of goals for this period, and we accomplished a rewarding (but exhausting) list with their guidance.”

**Even with modified responsibilities during a sabbatical, staff members who step into an executive director role benefit greatly from a high level of board and staff support.**

***CNE Services and Donors*** Cindy noted, “We are very proud that as a team and with hard work, we could support the executive director’s sabbatical and continue high quality service.” During the sabbatical, CNE provided the same high quality, targeted, low cost tools, trainings, resources, and technical assistance to its members and community of local nonprofits.

Some **donors questioned the sabbatical**, although concerns weren’t fully expressed until after the fact and on reflection. Issues raised included: the absence of executive director expertise during the sabbatical; the fact that the sabbatical benefit was available only to the executive director rather than to all staff; concern that a sabbatical wasn’t a viable option for many small nonprofits; and the cost to the staff and board to manage interim leadership.

If these are issues at play with your key donors, see [\*\*From Creative Disruption to Systems Change: a 20-Year Retrospective on the Durfee Foundation Sabbatical Program\*\*](#) (Appendix E).

All donors’ concerns regarding the expense of the sabbatical were respectfully shared and provided CNE with an opportunity to learn, educate and, in most cases, mitigate the negative impact.

***Although the discussions were approached with mutual respect, one major donor's concerns impacted that donor's level of support for the organization the next year. This type of reaction is an important risk to consider and plan for, and a critical dimension for board discussion.***

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## THE RE-ENTRY PROCESS:

***The Positive Results*** The executive director returned to CNE post sabbatical with a renewed energy for and commitment to her work. She also brought with her a clearer strategic vision for the organization that she was able to implement in partnership with the board the following year. **CNE staff experienced a significant opportunity to stretch and grow through the sabbatical.** One staffer summarized, "I learned much more about the organization and our broader purpose." The space that emerged with a gap in leadership was filled with change, challenge, and professional development. Each of the staff members involved developed a more nuanced view of the organization, which helped them deepen their own work. The co-directors stepped up to new roles, connecting at a higher level while fulfilling the demands of leadership.

While not all board members increased their engagement with CNE during the sabbatical, those who did also developed a new understanding for and commitment to CNE.

*"I was deeply impressed at our board chair's steady leadership during the sabbatical period. As a high-level business manager, Joe understood what it takes to keep a staff feeling confident and supported. In addition, several other members of the board took the opportunity to increase the time and energy they have to the organization. My sense is that, as a board, we now have a stronger sense of what it takes to make the CNE run smoothly, effectively and responsively. Sitting closer to the inside of the CNE has made us appreciate and attend more thoughtfully to the complexities of our operation."*

-Kakie Brooks, then Vice-Chair of the Board

Russell Willis Taylor, CNE's Board Chair at the time the board approved the sabbatical, recalled positive results the sabbatical created for CNE staff and board:

*"The board of CNE had two motivations in approving this sabbatical for Cristine: to retain an extraordinarily talented leader and to enhance and test the bench strength of*

*the other management at CNE. The results surpassed our expectations. We not only became far more engaged as a board but we saw the energy that the interim leaders brought to the table. On her return, Cristine was able to re-engage without eroding positive organizational behaviors that had emerged in her absence, and her own creative thinking was even stronger after time away. As a chair I would recommend this to any board that believes in its leadership.”*

***Surprisingly Challenging*** The executive director and interim co-directors noted that re-entry was a bigger challenge than expected, and recommended slowing down the process. “The return of the executive director seemed like the finish line, and it really should have been a new starting point to come together as a team.” The co-directors in this period were feeling the emotions of a hard-won time of growth and success, but they were weary from the work. The executive director, on the other hand, came back rested and refreshed, and felt a responsibility to re-engage quickly in support of the team. The difference in energy and approach initially created friction and frustration, and reflected the need for a pause to take a temperature check, learn from each other, and recognize the inevitable changes for individuals and for the team. To recognize the positive impact of a sabbatical, there needs to be time to process change, recognize individual growth, and define a new reality.

According to the executive director, ***“If I could re-imagine our approach to re-entry, I would structure time to collaborate as a staff team. This would have been a great time for a two-day staff retreat to review our experience and process. This was a busy and emotional time, and our efforts would have been well-served to celebrate the process, reflect on change, and plan collaboratively for next steps.”***

Upon the executive director’s return, each co-director received a bonus in recognition of her hard work and leadership during the sabbatical. The bonus was a surprise to the co-directors, but planned for in advance of the sabbatical. In hindsight, it would have been more effective to award the bonus at the beginning of the sabbatical to demonstrate the organization’s complete faith in the co-directors and in reflection of the work to come. Understanding the fatigue felt by the co-directors following the sabbatical, the executive director also encouraged each co-director to take one additional week of unplanned leave as soon as possible on her return.

**Post Sabbatical Notes** Seven months after the sabbatical, one of the interim co-directors left the organization to develop her own special events business. While not the sole reason for her departure, she cited the opportunity to lead, learn, and grow during the sabbatical as a key factor in her decision. The sabbatical also helped her realize that she did not want to pursue a career as a nonprofit executive director. The second co-director assumed a new title, director of strategic initiatives, in the year following the sabbatical and, with it, an expanded portfolio of work responsibilities including a focus on building strategic partnerships, the first of which she nurtured during the sabbatical. Three years after the sabbatical, the executive director is still with CNE, and the vice-chair of the board, one of the key sabbatical board leaders, continues her deep and deeply positive investment with the organization as CNE's board chair.

Significant time away from daily routines was the major contributing factor to this renewal and its beneficial effects, both for the [sabbatical] awardee and his or her organization. These effects can last a long time. The preponderance of survey takers reported that many of the positive changes they experienced remained with them one year or longer, post-sabbatical.

- [Creative Disruption, Sabbaticals for Capacity Building & Leadership Development within the Nonprofit Sector, Durfee Foundation.](#)

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## CONCLUSION:

The CNE sabbatical experience has indeed created considerable organizational learning and growth. "This is a mission-driven organization with talented staff and we navigated this territory with professionalism and a commitment to each other and the mission," summarized the current board chair. "Change is a constant, so creating opportunities to be nimble as an organization is time well-spent. This was a great way to challenge our mindset and keep valuable executive talent. We recognize that creativity needs room to grow and a sabbatical provides a great opportunity."

Cindy Colson, one of the sabbatical co-directors noted, “Many of our members are really looking forward to this case study information to generate a discussion with their boards. The intensive work of nonprofits can be stressful for key employees. The opportunity of a sabbatical can be a creative and productive response to nonprofit burn-out.”

Another staffer reported, “There was a great spirit of ‘how can I work with you’ added to our already-positive team culture. It encouraged me to step up my contribution. New definitions of teams and shared responsibilities developed, and this created more cross-training and back-up for varied responsibilities. “

The executive director expressed that while there were bumps along the way - the hardest being donor feedback and education and the challenges of re-entry - she is more committed to CNE than ever; she described the sabbatical as a restart button, giving her the stamina, focus, and perspective she needed to help steer the organization through a time of challenge and change and towards even deeper community impact.

*“I would encourage any organization that is considering a sabbatical for its ED or other key staff member to remember that, while the benefits for the person who is taking time away can be enormous and will likely have long-term benefits for the organization, there will also be nuanced circumstances informing any such decision that need to be considered and debated as fully and honestly as possible beforehand.”*

-Kakie Brooks, Current Board Chair

CNE has three core values: it has a passion for performance, a belief in the power of collaboration, and commitment to the potential of nonprofit organizations. This sabbatical case study embodies those values and, we hope, provides a new tool for nonprofits seeking to explore how best to invest in strong leaders, while developing organizational bench strength, and deepening board engagement.

## SABBATICAL DISCUSSION GUIDE

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### *Questions for Boards Considering an Executive Director's Sabbatical or Sabbatical Policy for Staff*

- Considering the CNE sabbatical experience, would this type of policy benefit your organization? Is this a viable topic to pursue for your organization and why?
- How does this case reflect your board priorities for valuing and investing in your staff resources?
- Considering the culture and characteristics of your board, how would you redefine your board's role and responsibilities shift during the sabbatical?
- How would your board consider and evaluate the financial and communication challenges of implementing this type of leave?
- How would you ensure that the lessons learned from the sabbatical are identified and developed into growth opportunities?
- How could the CNE sabbatical experience apply to other leadership challenges for your organization?

### *Questions for Executive Directors Considering a Sabbatical or Sabbatical Leave Policy*

- What are your personal and organizational goals for considering a sabbatical?
- What benefits would your organization gain discussing this option and/or implementing a similar process? What challenges would you need to manage?
- Considering the culture and characteristics of your organization's board, how would you approach this discuss with your board?
- How could the CNE sabbatical experience apply to other issues that your organization faces such as leadership succession, creative disruption/change, and employee benefits?
- Considering a leave policy can have personal, financial, and team-building implications. Identify three to five high level principles that you would use to manage the short-term and long-term challenges of this change?

*Questions for the Executive Director to Ask the Team upon Re-Entry*

- What are the top three things that you recommend for my effective re-entry?
- What did you learn about your skills, your role in the organization, and about yourself while I was away?
- What responsibilities did you take on that you want to keep? What can't you wait to give up?
- What is the most positive change (for you) from this time period that you want to ensure to keep in place to benefit our organization?

**APPENDIX A**

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[The Durfee Foundation's Sample Sabbatical Policies](#)

The Durfee Foundation. *Do-It-Yourself Sabbatical Guide for Nonprofits, with Sample Policies*. May 2018. Pages 6-14.

**APPENDIX B**

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[Sabbaticals: A Checklist for Preparing, Managing, and Re-Entering](#)

CompassPoint Nonprofit Services. *Sabbaticals: A Checklist for Preparing, Managing, and Re-Entering*. 2008.

## **APPENDIX C**

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### **CNE's Pre-Sabbatical Survey**

Staff & Board Leadership Online Survey

#### **IDENTIFY POTENTIAL CHALLENGES**

1. What is your greatest concern regarding the sabbatical for your role or CNE?

#### **BUILD BENCH STRENGTH**

2. What will be the co-directors' greatest challenge in leading the organization?

3. If the sabbatical does build bench strength, how will CNE look different upon the ED's return?

#### **STRENGTHEN BOARD ENGAGEMENT**

4. What impact do you hope the sabbatical will have on the CNE board and the way it governs?

The Center for Nonprofit Excellence. *Pre-Sabbatical Survey Template*. May 2015.

**APPENDIX D**

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[Cost of Employee Turnover Vs. Retention Proposition](#)

Verasai, Anna. *Cost of Employee Turnover Vs. Retention Proposition*. The HR Digest, 16 March 2018.

**APPENDIX E**

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[From Creative Disruption to System Change: A 20 Year Retrospective on the Durfee Foundation Sabbatical Program](#)

The Durfee Foundation. *From Creative Disruption to System Change: A 20-Year Retrospective on the Durfee Foundation Sabbatical Program*. September 2017.