

SABBATICALS:

A CHECKLIST FOR PREPARING, MANAGING, AND RE-ENTERING

PRE-DEPARTURE PREPARATIONS (at least 6 months out)

Executive Director

- Establish a Temporary Leadership Plan with Executive Committee of Board.
- Identify primary executive functions to be covered during the sabbatical.
- Identify all projects to be managed during the sabbatical period (this may include fundraising events, board meetings, newsletter oversight, etc.).
- Work with Board to designate which manager(s) will cover each function and project.
- Work with Board to designate one manager to serve as Acting Executive Director.
- Devises and execute an orientation and training program for the designee(s) for the functions they will carry. Preparations could include:
 - workshops & classes
 - mentoring
 - pre-departure delegation and feedback
 - relationship building with key stake holders.
- Identify external peers or consultants to be on call as problem solving resources for Acting Executive Director.
- Identify important external stakeholders to be informed of Acting Executive's status at point of executive's departure.
- Present pre-departure plan to Board of Directors for ratification.
- Develop Plan to manage all documents, internal communications, and external communications requiring the executive's response.
- Prepare plans for a smooth transition upon return.
 - Keep the schedule light.
 - Schedule a meeting with Acting Executive Director to share learning's and express appreciation for the additional work the Acting ED took on.(A dinner or some other more formal appreciation is recommended).

Board of Directors

- Prepare Executive Committee to provide support to Acting Executive during the sabbatical.
- Clarify the limits of executive authority for the Acting Executive Director.
- Develop communication plan for key external stakeholders to be informed of Acting Executive's status at the point of executive's departure.
- Establish compensation to be provided for Acting Executive and possibly other staff who take on additional responsibilities during the temporary ED departure.

MANAGING DURING THE SABBATICAL

Executive Director

- Remain detached from the organization for the duration of the sabbatical to allow the management team and others to take on complete responsibility.

Board of Directors

- Executive Committee establishes regular check-in conversation with Acting Executive.

Acting Executive Director

- Check in with support resources as needed.
- Keep track of issues and business to be discussed in a post-sabbatical debriefing with the Executive Director.

RE-ENTRY AND DEBRIEFING LESSONS LEARNED

- In preparing to re-enter, the Executive Director considers 4 questions:
 - What are my expectations and hopes going forward in my job?
 - What am I going to focus on in my first two months back?
 - What am I going to bring back from my sabbatical?
 - What pre-sabbatical habits and behaviors am I leaving behind?
- Similarly, the managers, just prior to the return of the executive director, debrief on:
 - What was refreshing and different in the way the agency was managed during the ED's absence?
 - What other insights on managing the agency were gained during the sabbatical?
 - What new ways of managing do we want to ask the ED to consider on his/her return?
 - What gifts and talents of the ED did we especially miss during his/her absence?
 - Are there any outstanding issues or disputes that need resolution with the help of the ED on his/her return?
- The executive director and managers meet to discuss their reflections and insights. *(At any one of these debriefing steps, it may be helpful to have third party facilitation in order to maximize the insights to be gained and provide a neutral guide and mediator).*
 - The executive director offers his/her resolutions for how he/she expects to practice better self-care habits and to perform differently on the job.
 - The managers offer their insights and requests for how they would like to the agency managed differently going forward.
 - The executive director and managers resolve differences in their expectations and make explicit their agreements on changes expected of one another going forward.
 - The executive director sees to the resolution of any issues or disputes that arose during the sabbatical.
- Executive "eases" back into full duties and schedule over 3 to 4 weeks, e.g., no major writing deadline in first month.
- Executive meets individually with Acting Executive Director and with managers and debriefs with them on their experiences during the Executive's absence and issues needing attention:
 - What was refreshing and different in the management style of the Acting Executive?
 - Are there any outstanding issues or disputes that need resolution?
- Board and Executive formally acknowledge and thank Acting Executive Director.
- Executive conducts performance evaluation on tenure of Acting Executive Director to provide learning for the Acting Executive.