



from **Creative
Disruption to
Systems Change**

**A 20-Year Retrospective on the
Durfee Foundation Sabbatical Program**



September 2017

The Durfee Foundation is a private, family philanthropy based in Los Angeles. Since 1997, Durfee has invested in helping to rejuvenate the bodies, minds, and spirits of Los Angeles's most gifted nonprofit leaders through their Sabbatical program. Durfee provides time for leaders to break away from daily routines for three months—to rest, travel, explore, learn, and re-connect with family and friends. Central to the Sabbatical program's philosophy is an openhearted belief in leaders and their capacity to both regenerate themselves and become generative leaders for their organizations and communities.

Durfee's Sabbatical program is deceptively simple in its design and comparatively inexpensive, yet yields deep and abiding impacts for leaders, their organizations and L.A.'s nonprofit community. I had the privilege of working with the Foundation before in 2009 on *Creative Disruption: Sabbaticals for Capacity Building & Leadership Development in the Nonprofit Sector*.¹ That evaluation, on behalf of Durfee and four other foundations that offered sabbatical programs, demonstrated that sabbaticals are key to:

- Rejuvenating nonprofit leaders
- Increasing organizational capacity—especially in strengthening the capacity of second-tier leadership or strengthening the bench
- Enhancing succession planning
- Strengthening governance

A three-month sabbatical for nonprofit leaders can be a lever for whole systems change.

¹ *Creative Disruption: Sabbaticals for Capacity Building & Leadership Development in the Nonprofit Sector*. Deborah Linnell & Tim Wolfred. Third Sector New England and CompassPoint Nonprofit Services (2009)

This 20-year review of the Durfee Sabbatical program confirms all of those findings and also shows that sabbaticals are useful for:

- Retaining nonprofit leaders
- Shifting a leader's perspective from daily management to distributed leadership and generative thinking and activity
- Creating a *permanent* shift in the culture of work/life balance for both the leader and the organization's staff
- Acting as dry runs for eventual permanent transitions

These findings also support sabbaticals as contributing to *nonprofit stability*—and even more so—*sustainability*. What is particularly special about offering and supporting a three-month sabbatical for nonprofit leaders is that it can be a lever for whole systems change. Like the proverbial pebble thrown in the pond, sabbaticals quickly and organically create lasting change at the personal (attitude/perspective), structural (job descriptions changed, teams restructured), and system (leadership, mission/impact) levels. The changes are driven from within, rather than by outside consultants—creating deeper shifts in awareness and fostering adoption of new practices. It is experiential, hands-on and deeply felt learning. Basically, sabbaticals help leaders to both rest—and see anew. As the case studies here show, leaders return and tend to lead more adeptly, leaning deeper into the most meaningful work at hand. Passion re-ignited, joy re-found, better balance struck—intangibles that result in tangible results. As leaders recharge and see with fresh eyes, organizational practices begin to mirror such new perspectives. And as their organizations grow and deepen, so does the social benefit they provide.

—Deborah Linnell, *Independent Evaluator*

Field-Building: A Culture of Learning and Sharing

The Durfee Foundation's persistent purpose and tinkering culture—that is, its capacity for institutionalizing reflective practice and learning from doing over time—extends to its culture of sharing key lessons about its programs with peers in philanthropy. The ripple effect of the Durfee Foundation sharing what they're learning is made evident with its early support of now well-established sabbatical programs such as The California Wellness Foundation and the Barr Foundation (Boston), among others.

A continuous feedback loop from sabbatical applicants and awardees informs the evolution of Durfee's Sabbatical program.

As a result of listening to user feedback, the Sabbatical program has made gradual changes over the years—such as increasing funds to help underwrite the cost of the sabbatical, providing support to interim leaders or interim teams taking on additional responsibilities and seed funding for professional development for all staff.

All of these programmatic lessons and tweaks are shared with peers in philanthropy. Durfee has been a leader in quantifying and qualifying the value of sabbaticals beginning with the 2007 publication *The Sabbatical Compendium* that reviewed sabbatical programs across North America, and it championed the 2009 *Creative Disruption* meta-evaluation of nonprofit sabbaticals undertaken by Durfee and four other foundations. Most recently, Durfee created the *Sabbatical Programs for Nonprofit Leaders: A How-to Guide for Funders*², a succinct guide for foundations for developing a sabbatical program.

After 20 years of evolution, the Durfee Sabbatical program has five core design elements:

- Open application process for established nonprofit leaders
- Three-month absence with no contact with the Awardee's organization
- Internal staff (an interim or a management team) leads in the absence of the leader (not a professional interim executive director)
- Professional development support for the organization's staff
- An ongoing, semi-structured but regular peer group for Sabbatical alumni

Over two decades the Durfee Foundation has refined the support it provides for an organization during its leader's sabbatical. Besides \$45,000³ awarded to recipient organizations to cover the cost of the leader's salary, benefits, and some costs related to sabbatical activities, there is an additional \$3,000 provided to the interim leader (or management team) as a bonus for stepping up in the leader's absence. In addition, a \$5,000 Professional Development Fund is provided to support the professional development of staff other than the leader based on a plan the organization submits with the application.

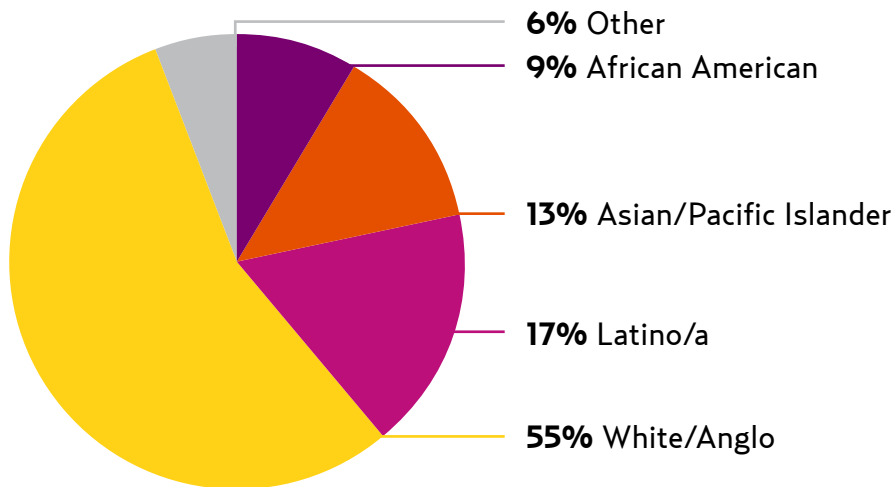
Durfee's patient, long-term funding; a well-thought out design; engaged, respectful grant-making; and ongoing informal and formal feedback that leads to ongoing program tweaks have led to impressive results for Los Angeles County nonprofits and a body of value-added knowledge for the non-profit sector.

² [Sabbatical Programs for Nonprofit Leaders: A How-to Guide for Funders](#), The Durfee Foundation.

³ Increased from \$25,000 since the beginning of the program.

The Durfee Sabbatical program awarded its first sabbatical in 1997 to seven leaders. Subsequently, awards were given every year to six leaders until 2009 when the program became biennial.⁴ Through 2016, a total of 100 sabbatical awards were made. For this retrospective study, a survey was sent out to 93 recipients who had taken sabbaticals and 69, or 74%, responded. The responses were representative of every sabbatical class with an average of four respondents out of six awarded for each class. More women, 56, than men, 46, have received sabbaticals. Of the 69 respondents, 54% (37) were women and 46% (32) were men. The program has also been fairly racially diverse:

Racial diversity of sabbatical survey respondents

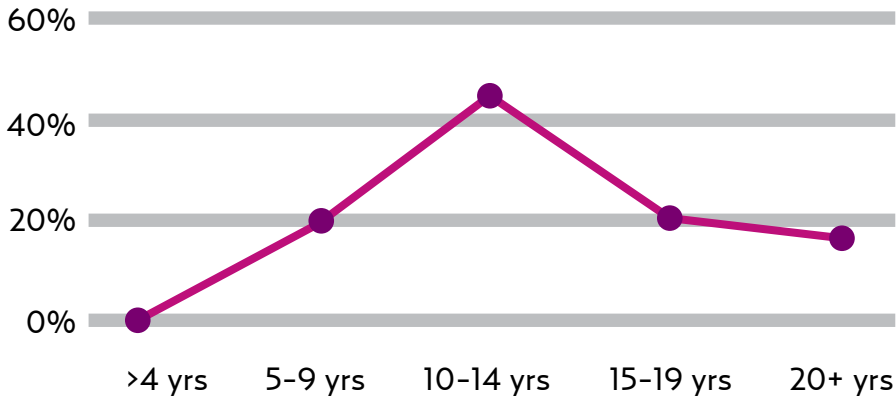


Years in Leadership Role and Age at Time of Sabbatical

Given the program's preference that applicants have at minimum a ten-year history of leadership, it is not surprising that 81% of the awardees had been in their role for at least 10 years at the time of the sabbatical and 20% had been leading their organizations for 15 or more years. The median age of respondents was 50 years. Forty-seven percent were in their 50s and 35% were in their 40s—basically mid to late-mid career. The remaining 18% were split between their 30s or 60s.

⁴ In 2009, staff and board of the Durfee Foundation decided to move from an annual to a biennial awards program. Application numbers were between 25 and 40 for the first 12 years and continue at this level on a biennial basis. Durfee's selection committee, including 3 former Awardees, screens 12 finalists and selects 6 Awardees for each class.

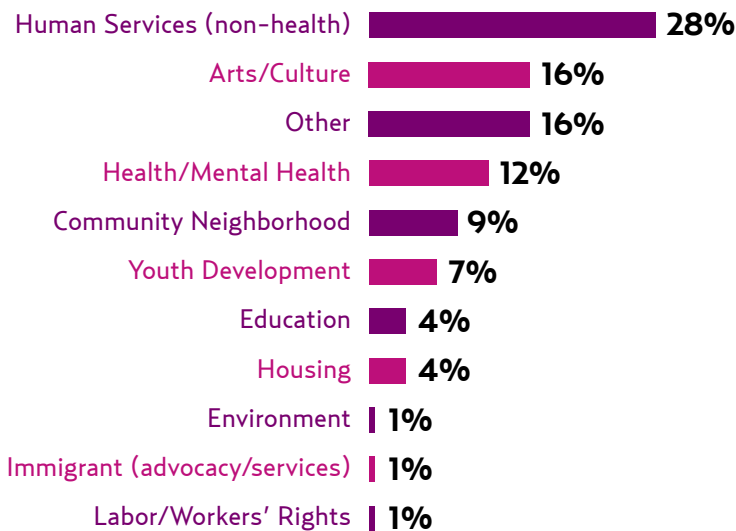
Years in current leadership role



About the Reporting Organizations

The Durfee Sabbatical program is open to leaders from all nonprofit fields. Human services (28%); arts and culture (16%); and health/mental health (12%) made up over half of the fields represented in the Sabbatical program. Many other types of organizations were also represented: community/neighborhood development, education, environment, housing, immigrant services, labor/workers' rights, youth development, legal services, civic engagement, women's rights advocacy, HIV/AIDS, domestic violence and disability services.

Fields of awardee organizations

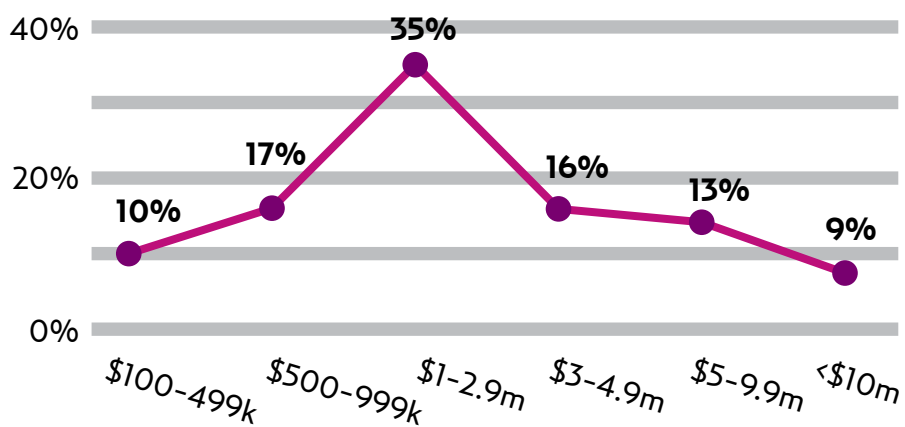


Budget Size of Awardee Organizations

Forty-seven of 69 reporting leaders (68%) cited budgets between \$500,000 and \$4,999,999. Another 22% had budgets over \$5 million. Smaller organizations with budgets under \$500,000

represent only 10% of the organizations. Durfee learned early on that very small organizations with staff of less than 5 are too stressed by a leader's 3-month absence and conversely expects most large nonprofits to be able to pay for a leader's sabbatical, resulting in a pool of mid-sized nonprofits.

Budget size of awardee organizations



Debra Suh: Building a Leaderful Organization

Anyone who has worked in the field of domestic violence prevention knows that it can be all consuming and, no matter the level of effort, there are families that still fall through the cracks. Pacing, self-care and a supportive work environment are critical to longevity in the field. Debra Suh has been the executive director of the Center for the Pacific Asian Family (CPAF) since 1999. Today she is deeply established in her leadership role, but when she began as a first-time leader, Debra admits she felt challenged, even overwhelmed, in such a demanding field while growing a family at the same time.

During her first years in leadership, Debra wondered if she was home enough for her young children, while also worrying if she was doing enough to lead an important organization. As she shouldered more and more work, she felt bad about asking others to share the load—a classic pattern of the heroic leader.

In 2007 she was at a breaking point—overworked, torn in two directions, and questioning if she was in the right place. Her mentor Debbie Ching, who was a Durfee Sabbatical alumna, encouraged her to apply for a Durfee Sabbatical. She did, thinking she would not be selected. But she was, and the sabbatical experience was deeply clarifying for her and transformational for the organization. During her sabbatical, Debra traveled, but mostly stayed at home with her children, creating a norm she had not been able to establish while working. She picked her children up from school and was home for dinner.

Before leaving on her sabbatical, Debra did something unusual among sabbatical awardees. She actually “hired up” and restructured before her departure, something that other leaders usually do upon their return. She hired an associate director and assistant and immediately started delegating more work. She knew that part of her sabbatical would include deep questioning about her place in the world, and whether or not she should continue as the leader for CPAF. She began to consider how the organization could be sustained without her. These steps and questions were the seeds for creating the CPAF of the future.



Would Debra have thought to make these changes without the sabbatical? No, she says emphatically. Just planning for the sabbatical changed her organization's routines and shed new light on the current reality. Without that new perspective, Debra feels she would have soldiered on until she was burnt out, and would likely have left the organization.

Debra's clarity and resolve translated into an era of growth and change for CPAF. With new perspective on her leadership, she let go of the day-to-day oversight, handing over increasing responsibility to senior staff. She was able to shift to a more generative leadership approach, focusing on developing new strategies and fundraising. Despite returning from sabbatical at the beginning of the Great Recession, Debra was motivated to create a new community center and develop deeply important violence prevention programs focused on youth. She took the organization's fund development to a new level, increasing the budget from \$1.6 to \$3.4 million.

The lessons of the sabbatical helped Debra to shift from being a heroic leader, carrying too much of the burden of leadership herself, to a leader who develops other leaders. The senior leadership team, who led during her absence, remains to this day and form a core leadership group with her. Debra's style is now both distributed and facilitative, with most decisions made by consensus. She does not have to be the only representative for CPAF. The department heads have become leaders in their own right in California's domestic violence and sexual assault fields. Professional development funds are available for all staff, as well as a sabbatical policy that allows staff with 5 or more years of tenure to take a six-week sabbatical.

Debra continues to be a reflective leader and regularly attends leadership retreats. CPAF work is now more balanced for all, leadership more distributed and prevention programs are growing and have meaningful impact. There are new challenges—federal budget cuts on the horizon and a recent acquisition that has the organization feeling "disrupted"—but they are challenges Debra feels the organization is prepared for with its more sustainable model and aligned leadership.

From the Leader's Perspective: Applying, Planning and Letting Go

The application process is key to the Durfee Sabbatical program's success. The program is designed for "established Los Angeles leaders acting in the principal leadership role of an organization for at least 10 consecutive years."⁵ Except for requiring that an organization have at least 5 staff, Durfee has not been prescriptive regarding what types of nonprofits are represented or other demographics. After the initial years where the Durfee Foundation did outreach to educate people about the program's availability, there has been an ample pipeline of applicants.

Beginning with the second application review, in 1998, three alumni were added to each round's selection process on a rotating basis. The peer reviewers add diversity, depth of experience in both the executive seat and as a sabbatical recipient to each selection process. Peer reviewers also become key ambassadors for the program—often counseling other leaders on the value of the sabbatical. Plus, they provide honest, first-hand feedback to Durfee staff on how to improve the program.

The application process tests for readiness and worthiness, but more importantly it begins the journey of a leader's self-reflection and mindfulness—something they may not make time for in their hectic, pre-sabbatical, day-to-day lives.

Rest, Reflect, and Renewal

Deep emotional and physical *renewal* was the most sought after outcome by applicants, particularly renewal from burnout or near burnout. Twenty-one of 61 survey respondents (34%), when asked what led them to apply for the award, responded that they were near burnout at the time of application: "I applied for the opportunity to take a break from work and avoid complete burnout." Three of the 21 had just experienced a death in the family or a "trying time," and another three respondents described an actual breakdown in their health as a result of overwork and stress. "I had numerous stress related health problems because I was working nonstop."

Related to needing rest, but possibly not at the level of those who cited being close to burnout and physical exhaustion, were

The application process begins the journey of a leader's self-reflection and mindfulness.

⁵ *Sabbatical Programs for Nonprofit Leaders: A How-to Guide for Funders*, The Durfee Foundation (2016)

those respondents (23%) who cited *reflection and refreshment* as the key reason for applying for a sabbatical:

“I knew I needed time to reflect about the next chapter of my life, both professionally and personally.”

A key evolution of the Sabbatical program is that applicants view the sabbatical as a value add for themselves and their organization. Based on what they have learned through studies, observed or learned from Sabbatical alumni, some newer applicants purposely apply to develop their organizations (bench strengthening, succession planning). Survey respondents also cited the ongoing learning offered through the convening of the alumni network as part of their reason for applying.

Encouragement From Family, Friends, and Peers

An open application versus invitation can be a concern for sabbatical programs because modest, heroic-type leaders might not apply. It is important then that as a sabbatical program establishes itself, word of mouth from peers and encouragement from alumni or foundation staff or boards of organizations create permission for leaders to apply. And support for the decision to apply from family, friends, and staff at the organization is critical in creating the permission many leaders feel they need in order to take a significant break.

As the numbers of Durfee Sabbatical alumni have grown over the years, they have become key in helping other leaders make the decision to apply: “The number-one reason I applied was because former recipients strongly encouraged me to apply, many times. Otherwise—I honestly would not have. I would have assumed there were other more qualified candidates, and also, there was the perceived hurdle of getting board support. *I later realized that both these assumptions were internal to me, not really reflective of how others thought.*”

Planning For Time Away

Previous studies have demonstrated that sabbatical recipients who spend time planning their sabbatical or even taking an hour of coaching to get perspective about what the sabbatical means to them have a better sabbatical experience.⁶ Durfee staff anecdotally noted that those leaders who take more time to plan tend to have a more rewarding sabbatical. After many years of

Over 90% of sabbatical recipients found friends, family and staff of the organization to be very supportive of their taking a sabbatical.

⁶ *Creative Disruption: Sabbaticals for Capacity Building & Leadership Development in the Nonprofit Sector*. Deborah Linnell & Tim Wolfred. Third Sector New England and CompassPoint Nonprofit Services (2009)

experience, Durfee staff and program alumni are able to provide suggestions for planning for the sabbatical—identifying an individual, but more typically a team, to provide interim leadership; dividing particular tasks among the team members; identifying roles and tasks for the board of directors during the leader’s absence; helping to create clarity of communication and decision-making among team and board members for the duration; clarifying the rare emergency instance when the leader might be contacted on sabbatical, and so forth.

Even so, at the individual level, for the leader, planning for and taking the leap away from one’s day-to-day work experience is not easy. Learning to “let go” remains a personal experience for each individual awardee—a critical part of the learning journey—as the letting go process is a part of what later fuels the capacity to come back and further let go of the day-to-day.

Durfee learned early on to require that a leader begin their sabbatical within a year from the day it is granted. The lesson is captured in its *How-to Guide*, “The fact is, there is no truly convenient time to take a sabbatical—there will always be unexpected grant deadlines, staff emergencies and funding crises, but the recipient and the organization must commit to making the sabbatical happen. A firm deadline facilitates that commitment.”⁷

The experience of the awardees bears out the importance of the one-year limit for planning and taking the sabbatical. Without a firm deadline, these challenges could forestall a sabbatical indefinitely in the leader’s mind. Some issues cited by respondents to the survey included:

Timing: “Determining the right time to disengage. This was the beginning of the Great Recession.”

Preparing the organization: “This was the first time our leadership team was going to be taking the reins of the organization without me. They were quite hesitant even as they were supportive of me taking the sabbatical. The Durfee Foundation support of our leadership team made all the difference.”

Worry/concern about the organization: “Concern that I couldn’t pull myself away, that staff couldn’t do without me! Of course they could and that’s (one of the) beauties of the program—EDs see that it IS possible.”

⁷ *Creative Disruption: Sabbaticals for Capacity Building & Leadership Development in the Nonprofit Sector*. Deborah Linnell & Tim Wolfred. Third Sector New England and CompassPoint Nonprofit Services (2009)

Guilt: “Even when I received notice that I had been selected, the “guilt” was always present since...long-term employees were not benefiting from the award. The coaching and the financial gift that the deputy received, the funds provided by Durfee to formalize a staff development fund, and having the organization establish the fund, addressed the ‘guilt’ feeling.”

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The most basic gift of a sabbatical is summed up by an awardee simply as “the chance to disengage from the daily work; rest, spend time with my family and reflect on the future.” No one person’s sabbatical is the same, but certain factors have been found by Durfee and other providers of sabbaticals to contribute to a leader’s renewal and subsequent success for the individual and the organization. These factors include being away from the organization with no contact for three months, travel away from the home community for two to four weeks of the sabbatical, reconnecting with family and friends and some reflective time alone.

99% of reporting leaders found the sabbatical experience positive to very positive with 91% ranking it very positive.

Sabbatical importance to awardees



Awardees reinforced, in their own words, the importance of not simply taking a break away from leadership responsibilities, but also taking some space away from Los Angeles, as important to getting enough distance to gain new perspective and renewal:

“Distance! Literally being in Italy and later Britain ‘shocked’ me out of my ‘I am the organization’ mindset.”

“Traveling outside the country really forced me to disconnect from work, but to reconnect with my family. My daughter loved that I spent time with her.”

Connecting to family is also important:

“I think one positive thing that contributed to my sabbatical was the time that I was able to spend with my elderly mother and my granddaughter.”

In addition, when asked to explain in their own words what “contributed positively to your sabbatical experience,” 27% of 51 respondents wrote to the importance of the structure of the Durfee Sabbatical program as exemplified in this comment:

“The structured and unstructured guidelines of the sabbatical. The rules of disconnecting from the organization, no work-related activities during the sabbatical, and the support for the deputy assisted me since I took the guidelines seriously and wanted to honor the gift of the sabbatical. The freedom that the sabbatical provides to do whatever I wanted to do gave me the time to address so many internal issues that would have kept me from staying healthy.”

Re-entry Can Be Challenging

Some Sabbatical awardees have found coming back after three months challenging.

“I couldn’t imagine how much I did in a normal day at work—feared my ability to return to that,” and “the thought of re-entry gave me anxiety,” and “re-entry was harder than I expected.”

The Durfee Sabbatical program and other nonprofit sabbatical programs have found supporting re-entry is key, namely by sharing experience and knowledge gained by sabbatical awardees over the years. As Durfee writes in its *How to Guide*:

“Some recipients have found that ‘everyone moves too fast’ after slowing their pace during the sabbatical. Others experience post-sabbatical blues, or simply feel out of the information loop when they rejoin staff.”

While every individual experiences re-entry differently, naming this as a particular point in time in the sabbatical experience helps leaders and organizations prepare. The growing body of knowledge about nonprofit sabbaticals makes awardees aware that re-entry will be another program transition point and good practice points to taking the first few weeks slowly, and using the time for observation, listening, and reconnection.

John Maceri: Leading Anew

John Maceri joined Ocean Park Community Center (OPCC) in 1999 to strengthen the legacy of OPCC's "neighbor helping neighbor" founding philosophy to improve the lives of Santa Monica's most vulnerable, low-income people.

One decade into his tenure as Executive Director, John led an expansion of programs at OPCC, culminating in a five-year capital campaign that resulted in relocating programs and expanding the organization's campus. It was a time of great achievement—a convergence of activity and accomplishments—but the completion of the campaign left John questioning "what next?"

John was cognizant of the fact that some leaders can stay too long and he did not want to be "that guy." For several years, he had been encouraged by peers to apply to the Durfee Sabbatical program, but he wanted to be sure he wasn't using it as an exit strategy. John took his sabbatical in 2012. Before leaving, he spent time with the OPCC leadership team to talk about division of labor and to make sure they were comfortable and clear about roles and responsibilities during his absence.

The sabbatical enabled John and his partner of 29 years to spend quality time together and to recommit to a better work/life balance. John admits that reentry to work was difficult, after slowing down so much—in fact, he admits he was a bit scared. He was worried that all of his thoughtfulness about figuring out his next steps would go out the window, and that his lessons about boundaries around personal and family time would not hold fast. However, after a few weeks back, John found his footing. Five years later, he reports that he has held his boundaries. He is better at planning his calendar and carving out personal time and does not check emails on the weekend, judging "what can wait 'til Monday" and role modeling how to lower the sense of urgency for staff.

John returned from sabbatical energized to tackle "big, audacious goals." He says that without the sabbatical he would not have had the opportunity to "really step back and think deeply about what's next for me and the organization." He returned from



sabbatical wondering, “who are we as an organization?” and engaged the staff and board in talking about and conceptualizing the next 10 years.

With renewed energy and focus, John undertook a merger with another large, well-established organization, LAMP Community, to create a new entity, The People Concern, in 2016. Now one of the largest organizations of its type in Los Angeles, The People Concern provides a fully integrated system of care to the city’s most vulnerable homeless people to help them rebuild their lives. Philosophically, the organization believes in long-term involvement in human lives with care and mutuality, reminiscent of OPCC’s founding “neighbor to neighbor” community roots. Advocacy and systems change, not only direct service, are at the heart of the work as well. Most recently, The People Concern has focused on decreasing the homeless population’s over-dependence on hospital emergency rooms, working with area hospitals to create system changes for appropriate and preventative health interventions for the homeless.

The sabbatical also led John to think seriously about succession planning. While his departure is some years off, John believes thinking about future leadership is essential to organizational sustainability. In part, this means creating a formal succession plan, but it also means simply distributing leadership. John is leading a less hierarchical organization. He often puts out broad questions to his staff and asks “what do you think?” His goal is to spark critical thinking and imbue a spirit of collective ownership of the organization’s mission and future.

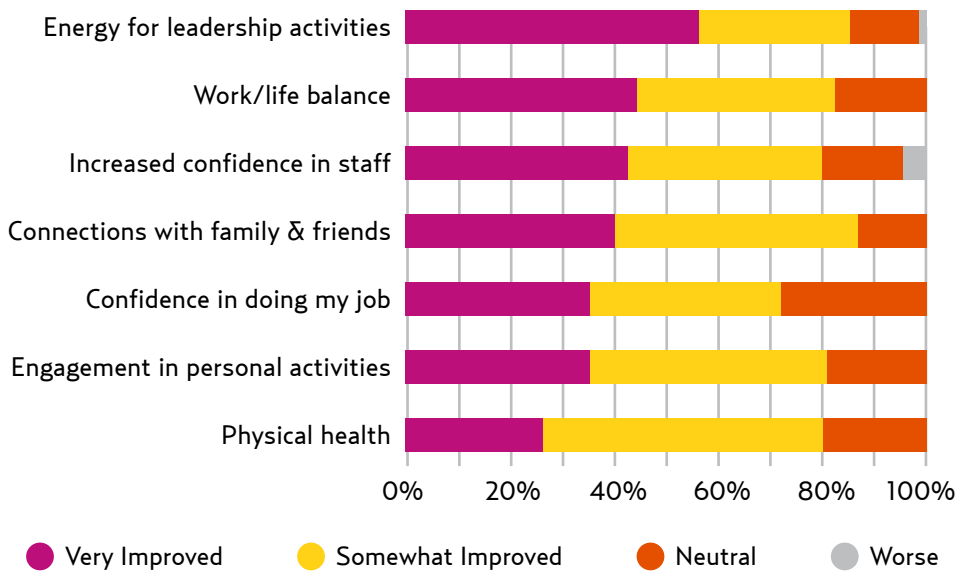
As John says, “No one is going to be here forever,” so by building shared stewardship for the organization’s future, John and his staff and board are ensuring that an organization centrally important to those in need not only endures, but keeps generating the change required by its constituents and meeting its evolving mission.

Benefits of Sabbaticals: Leaders, Organizations, the Region's Nonprofit Sector

Shorter-term Benefits for the Leader

The Durfee Sabbatical program shows important shorter-term benefits for a leader's renewed energy for leadership, work/life balance, physical health, and confidence to do the job.

What Improved for You Immediately After the Sabbatical?



Eighty percent or more of 68 respondents reported that energy for leadership activities (visioning, strategy, fundraising, supervision, communications, collaboration); connecting with family and friends; work/life balance and engagement with personal activities (exercise, creative, spiritual) all improved after their sabbatical. Over 70% reported improvements in physical health and confidence in leadership as a result of the sabbatical.

Lasting Impacts for the Leader

The short-term benefits for sabbatical recipients are valuable enough, however, after two-decades, the Durfee Foundation has begun to unearth longer-term impacts.

Lasting impacts cited by awardees included gaining career-long habits of improved work/life balance, new and lasting perspective on themselves and their leadership role, increased confidence, the ability to delegate and the importance of ongoing fellowship as quoted here: "The most lasting impact

The most lasting impact of a sabbatical for non-profit leaders is behavior change regarding work/life balance.

has been the enduring friendships and support from Durfee Sabbatical fellows” and “Becoming a part of the Durfee ‘family’ and all of its post-sabbatical support.”

Work/Life Balance

The value of seeing the importance of rest as essential to good leadership, resulting in actual behavior change for the leader (and also for the organization as noted below) is a key long-term impact of the Durfee Sabbatical program. In regards to work/life balance, Awardees reported:

“Learning to breathe and take breaks...even if it is only walking around the building several times where my office is located. Trying to unplug and take days off just to relax. Before the sabbatical I worked on grants on every vacation. I no longer do that.”

“The realization that it is important to schedule personal time into my schedule with more regularity.”

“The most lasting impact is learning how to shut off work and being stingy with my personal time.”

“I now schedule and take vacation time and stopped working six to seven days a week. I devote time for myself.”

New Perspective

Gaining new perspective—or the long “aha”—is immutable and therefore long-term in its impact: “Perspective and balance—it wasn’t an overnight change, but it was the start of a change that has made a real difference even over 10 years later.”

For some leaders, the space and reflection time the sabbatical afforded gave them perspective on themselves and where they wanted to be: “I gained a new perspective of who I am and what I want to do with my life. It was a permanent shift.”

Others gained greater perspective on themselves and their role and wrote that the lasting impact was, “Knowing my organization could continue without me,” and “To accept the fact that I am not irreplaceable and it is OK that I cannot do it all.” Related to this, several respondents reported that they gained perspective on the importance of any one staff person and when some

The majority of leaders returned from sabbatical with new perspective on the capabilities of staff who led in their absence, leading them to delegate more and restructure staff to better balance responsibility and workload.

experienced turnover of key management team leaders after their return, they were able to view the departure as an opportunity for new voices, change and growth.

Benefits to the Organization

Sabbaticals are a proven intervention for organizational change, but few programs have the longevity to begin to tease out the impact of sabbaticals on organizations over time. Leaders representing a 20-year arc of Durfee Sabbatical alumni identify several areas of lasting impact to their organizations:

Workplace Culture and Benefits

Nearly three-quarters of respondents reported an organizational culture shift towards more work/life balance. For some groups the culture change was informal: the leader modeling working fewer hours and taking more vacations balance rippled through the organization. Others codified work/life balance culture by revisiting benefit programs or offering sabbaticals more widely. Twenty-seven percent of respondents reported that there were changes in policy around benefit structures and that a sabbatical benefit had been extended to some or all staff. In the case of the sabbatical benefit, another 15% reported that their organizations were in planning stages to implement sabbatical policies.

Board Effectiveness

Forty-six percent of respondents rated their boards as more effective as a result of the sabbatical. Boards often step up during a time of a leader's absence—they learn more about the leader's job and the organization as they help plan for the absence and then support the management team often with much more defined check-ins and support than the leader usually receives. This affirms the same finding from the 2009 *Creative Disruption* national study of sabbaticals where both leaders and interim leaders reported that boards were more effective as a result of the planning and learning surrounding a sabbatical. In particular, that study found that 75% of responding interim leaders reported a "more productive relationship with the board of directors as a result of working more closely with them."⁸

⁸ [Creative Disruption: Sabbaticals for Capacity Building & Leadership Development in the Nonprofit Sector](#), Deborah Linnell & Tim Wolfred, Third Sector New England and CompassPoint Nonprofit Services (2009)

Restructuring and Strengthening the Bench

Sixty percent reported that some or all management jobs were restructured. The restructuring occurs primarily as a result of management teams stepping up during a leader's absence and the leader realizing that "the organization could function, at a high capacity, without me." Sabbaticals allow leaders to see a broader scope of work and let go of some of the day-to-day to engage in more policy or higher-level strategic work—the ripple effect being that other managers pick up more responsibility, in turn strengthening the bench of the majority of organizations whose leaders take a sabbatical.

Some national and regional studies have raised concerns about the lack of bench strength in the nonprofit sector. That sabbaticals provide a relatively inexpensive and organic platform for strengthening leadership within organizations is a key outcome.

Sixty percent of survey respondents in this study reported that all or some of the management team members' jobs were restructured as a sustained result emerging from the sabbatical.

Awardees reported that "new leaders of the organization were developed," and "Other staff members that covered for me during my sabbatical learned more skills that have been of great benefit to the organization."

"My sabbatical got the organization to assess our full leadership bench...Our group was going through changes, but (the sabbatical) showed us that we had a deep bench, and that the organization was not dependent on one person. It also was a catalyst to being more intentional about developing our senior team as part of building the institution."

Lessons from Interim Teams: Not Everyone Wants to Lead

Seventy-nine percent of respondents reported that, in their estimation, the sabbatical experience was also helpful to the professional development of the interim leaders. Interim leaders gained new perspective into the leadership position—allowing a few to succeed the sabbatical recipient later, while allowing others to realize this is not a role to which they aspire. Skills were built and people learned to work collaboratively, or in several cases working as a team was difficult and this became an area the organization subsequently addressed.

Sustained Benefits for the Organization



While some interim leaders went on to replace the executive directors, this was more the exception than the rule. Only three respondents reported that their interim replaced them. Many noted that the experience clarified for interims, even those being groomed to be the successor, that they did not want to step into the executive director role. “I believe it helped bring focus to their career path. They realized direct service was their strength and administration was a secondary focus,” and “It helped one of them learn she did not want to be an executive director, something she had thought was her career path. Instead she pursued a path that was far more meaningful to her.”

The sabbatical enables an interim leader or an interim team to “try on” the job, as much as it provides insights into roles, responsibilities and the overall capacity of the organization’s management group. And they may decide to move on.

Respondents to the survey noted that 46% of those who filled in for their leader or part of an interim team were no longer with the organization. These staff made lateral moves to other nonprofits (28%); left the nonprofit sector for a position in government or the private sector (19%); and 12% reported that the interim moved on to a CEO position in the nonprofit sector. A number of interims have also retired in the 20 year span of the Sabbatical program and others left to start families or go back to school or left the field due to health reasons or have passed.

The assumption that deputies, assistant directors and others in management teams might want to be the next leader has been one that the study of sabbaticals has proven to be just that—merely an assumption.

Benefits to the Region's Nonprofit Sector

One of the key results of a long-term funding strategy that includes continuous feedback and transparently shared lessons is building awareness, knowledge, and practice beyond the “walls of the program.” Durfee has intentionally and formally supported such knowledge building regionally and nationally. However, the benefits of sabbatical have also spread informally through alumni word of mouth among Los Angeles nonprofit leaders. Respondents to the survey agreed that the Durfee Sabbatical program has had the following impacts on Los Angeles County's nonprofit sector:

- 91% of Durfee Sabbatical awardees agree that sabbaticals as a strategy for rejuvenating leaders are more prevalent
- 91% agree that there is greater connectedness among nonprofit leaders who have received Durfee Sabbatical awards
- 88% agree that sabbaticals lead to greater attention given to developing the next tier of leaders
- 87% agree that sabbaticals as a strategy for retaining nonprofit leaders are more prevalent in the Los Angeles region as a result of the Durfee program

Formal and informal knowledge dissemination and field-building is critical to a shift in the future to more organizations offering sabbaticals on their own, more philanthropies offering sabbaticals, and an understanding of the importance of distributed leadership, supporting and developing the next tier of leaders, and the power of convening leaders for reflective time and learning.

Tammy Membreño: Rediscovering Her Compass

Some folks exude courage. Tammy Membreño is one of them. Diagnosed with lupus in her 20s, she had a child against doctor's advice and followed her passion of helping others—even when at times her own health was at risk.

During college, Tammy volunteered at Barrio Action—an organization she would eventually lead—under Sister Emmanuel Barragan, Barrio Action's founder, longtime leader and Tammy's great mentor. Early in her career, Tammy became a top administrator at a health organization, but it was not long before Sr. Emmanuel called to ask if she would apply to become the Executive Director of Barrio Action. Tammy recalls that the group of men who interviewed her clearly wanted to hire a man, but Sr. Emmanuel advocated for her. Tammy got the job and has never looked back.

Taking over from Sr. Emmanuel in 1991, Tammy built Barrio Action over the next 20-plus years from a small organization with three staff to one with 25 employees and multiple programs serving people of all ages with a special emphasis on helping high-risk and at-risk youth, young adults and their families in the El Sereno area of Northeast Los Angeles.

Tammy worked hard to raise \$9 million to open a new center, built in 2008. Despite struggling with her health, she did this work while raising her son with the support of her mother. She rarely took long vacations, nor even felt the desire to take a break due to her strong passion for Barrio Action. It took the sequential loss of loved ones, including Sr. Emmanuel, to bring her to her knees. Knowing her distress and that respite might help, Tammy's peers kept after her to apply for a Durfee Sabbatical award. She finally did so in 2015 and was accepted. It was a critically important moment, as Tammy says: "I lost my compass when Sr. Emmanuel passed, the sabbatical brought it back."

Tammy found true respite in traveling away from Los Angeles, fully removing herself from reminders of work, while also reconnecting with family. She traveled to Europe with her son, stopping through Washington, D.C., to meet President Obama. "What a way to start a sabbatical—meeting the President and



Vice President,” she says. In Rome, they went to the Vatican and saw the Pope emerge onto his balcony. Sr. Emmanuel had an audience with Pope John Paul years before, and Tammy felt the connection to her beloved mentor as she too stood in the presence of the Pope. She returned home to spend precious time with her family and to rest.

Recovering from loss of loved ones, loss of direction and declined health, Tammy returned from the sabbatical deeply renewed and rejuvenated. She was inspired to exercise and lost a good deal of weight, returning to work reenergized. Through her sabbatical, Tammy learned that in taking care of others, she had not taken care of herself. She decided that if she wanted to continue to do her work and be there for her family, she needed to prioritize self-care.

Learning that she still had more to give, even after 25 years, was the biggest gift of the sabbatical. Tammy rediscovered how much she truly valued the agency and the importance of Sr. Emmanuel’s legacy. The sabbatical brought her new confidence and perspective. People tell Tammy that since the sabbatical, she listens better and is calmer. She feels the time away enabled her to let go of something “and open up”—to get lighter. She is leading at a higher level, more expansive and embracing in her leadership.

Upon her return, Tammy saw how the staff worked outside the box to get things done. They got out of their siloes, which created a shift in how the organization worked—one that Tammy studied, appreciated, and built upon. Tammy knew she was missed, but the sabbatical also showed her what she could let go of and how she could share leadership. Now, she solicits staff and clients for feedback, and there is an expectation that everyone has a voice. The culture is about co-creation, not reliance on one leader. Newer staff see the work at Barrio Action as a team effort, always asking the question, “how can we make the Center even better?”

In hindsight, if not for the sabbatical, Tammy believes she might have quit. Now she sees herself in leadership for another 5 or 7 years. Her more open perspective is allowing her to prepare for a healthy transition, not leave in a moment of exhaustion and despair, but to plan more for passing on Sr. Emmanuel’s—and her own—legacy of community, love, and care to another generation of giving people.

Sabbaticals as Leadership Staying Power and Models for Transition and Succession Planning

Sabbaticals as Staying Power

One of the fears for boards and philanthropy regarding sabbatical programs is a concern that leaders will want to leave the organization soon after the sabbatical. This assumption has been disproved. In the 2009 study *Creative Disruption*, it was found that the percentage of sabbatical recipients who moved on within a year of the sabbatical was on average with national turnover of nonprofit leadership—13%. For the Durfee Sabbatical program, only 2 responding leaders (6%) left within a year of the sabbatical and of the 32 who have left, the majority, 45%, did so six or more years after the sabbatical.

Sabbaticals Model Healthy Transitions and Succession Planning

Separating in healthy ways is often elusive for human beings. Long-term leaders, particularly founders, may find that they do not know where the organization ends and they begin; leaving is like leaving a part of themselves behind. Executive transition management models developed primarily since 2000, based on the work of William Bridges⁹ and other transition theorists, point to a healthy, supported departure of the current leader as one of the key success drivers to healthy nonprofit leadership transitions. And practice in letting go helps, according to Durfee Sabbatical alumni. For example, of those 32 respondents who have transitioned from the job they had at the time of the sabbatical, 56% cited that the sabbatical gave them an example of how to depart with “awareness of themselves and others” and 22% marked that the sabbatical gave them an example of how to prepare for the departure.

Sabbaticals provide an excellent “dry run” for eventual permanent transitions. Where executive departures can get sticky is around the emotions of the departing leader and the staff who are left behind. Sabbaticals offer a safe, but real-life experience in letting go emotionally and temporarily.

Sabbaticals provide leaders the opportunity to see it is okay if they’re not at the helm and for the staff and board to know

Sabbaticals do not cause leaders to depart their organizations. Turnover at Durfee Sabbatical organizations is identical to the national average.

The power of having a dry run experience of letting go during a sabbatical when the stakes are lower than in a permanent executive transition cannot be underestimated.

⁹ [What is Transition?](#), William Bridges Associates.

they can survive and even create an opportunity out of the leader's absence.

In addition, planning for a sabbatical is a hands-on lesson in "succession planning for a temporary absence." Succession planning for emergency, temporary, and permanent leave of the leader and other key positions is sound practice. Fifty-seven percent of respondents reported that their organizations completed a succession plan or are planning to do so as a sustained change resulting from the sabbatical.

When Leaders Do Move On...

Of the 32 Durfee awardees who reported having departed from their organizations, 35% are partially or fully retired. Twenty-five percent took a leadership role in another organization in the same field, while 15% took a leadership role in a different field. Three leaders, or 9% of the total respondents, took a position in government and none reported leaving for the private sector. Teaching and consulting were also fields that engaged departing and semi-retired former leaders.

Staying Connected— Peer Learning and Support Across the Years

The Durfee Foundation gathers Sabbatical alumni twice annually for a half-day gathering over lunch. The luncheons started at neighborhood restaurants, but now rotate among the recipients' organizations. Alumni are also gathered at a biannual retreat. Respondents to the survey noted with special emphasis how important the follow-up gatherings are to them, with some stating that it is the most lasting aspect of the sabbatical experience. Accordingly, 96% of respondents attend occasionally to often, and only 4% say they never attend. Ninety-five percent of those who attend gatherings reported they find the meetings valuable.

Alumni attend for many reasons—highest among them are interesting/pertinent discussion topics, inspiration and new ideas, the cross-disciplinary nature of the group and an opportunity for confidential conversation among peers. What they value most is being in a space with peers who understand the leadership role, learning from peers, having “time-out-time” for reflection in the spirit of the sabbatical and networking.

Being With People Who Understand the Role:

“Fellowship, learning and understanding, a sense of maintaining currency and connection with my community.”

“Amazing conversations and fellowship with a special group of colleagues who understand the challenges you face in your day-to-day work.”

Connecting and Learning From Each Other:

“Being part of a community of great people who are passionate, smart, and committed, and having the opportunity to share and learn from each other. It’s a very ‘safe’ space where everyone understands what it’s like to be in a leadership role and all that entails.”

“The relationships in the Sabbatical fellow network are very valuable for my grounding and re-invigoration. Topics of discussion have been helpful to engage with this group.”

For those who do not attend regularly, retirement and having moved out of the Los Angeles area are key reasons. Only two, who felt their organizations are quite different from the majority, stated they did not get much out of the meetings. One respondent worries about the size of the group as it has grown from a more intimate 18 to 30 in the first five years, to a group closing in on 100 members.

Sabbaticals are so much more than a break for worthy nonprofit leaders. They not only rejuvenate leaders—but retain them as well. More often than not, organizational dynamics and culture shift as a result of the absence of a leader—elevating the capacity of second tier leadership, shifting the leader’s perspective from daily management to distributed leadership, allowing for more generative thinking and activity, and creating increased work-life balance for all-systems level impacts.

This is a time of leadership transition in the nonprofit sector as baby boomers plan for retirement; this will continue for the next decade or more. Sabbaticals are an invaluable tool for helping leaders find the space and time to reflect by themselves, and later with others about their tenure, and about what’s next for themselves and their organizations.

Very few capacity building interventions provide as much bang for the buck as the simple act of offering a sabbatical. Even more rare is that the lessons learned are organic and driven from within as each leader, staff and board member experiences the change first-hand, and changes as a result. Helping leaders and organizations find their balance and create resilience through rest so that they can truly sustain themselves is an important role for philanthropy. We hope more colleagues will consider supporting sabbaticals during these times of change.

Credits

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