

The Nonprofit Sabbatical as a Catalyst for Capacity Building:

**An Evaluation of the Fieldstone Leadership Network's
Clare Rose Sabbatical Program**

Year 2 Executive Summary 2017



Study funded by: The Clare Rose Foundation

About the Clare Rose Foundation

The Clare Rose Foundation is a small family foundation committed to honoring the values of its founder Valerie Vincent by supporting organizations and causes that foster well-being and strengthen communities. The foundation's grant-making has focused on the areas of education, health, and social services.



THE FIELDSTONE FOUNDATION

About the Fieldstone Foundation

The mission of the Fieldstone Leadership Network is to provide leadership training and learning opportunities that build and deepen professional and personal relationships among nonprofit leaders so they are better able to collaborate, problem solve and support each other as they work. To date, the Fieldstone Leadership Network offers nine separate programs and has a membership of over 1500 nonprofit leaders in Orange and San Diego Counties.



University of San Diego

**SCHOOL OF LEADERSHIP
AND EDUCATION SCIENCES**

About the Caster Family Center for Nonprofit and Philanthropic Research

The mission of the Caster Center is to provide research, evaluation, and consulting services that build the leadership and strategic- and evaluative-thinking capacity of local nonprofits, as well as to be the leading source of information, data, and research on the local nonprofit sector.

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EXECUTIVE SUMMARY

“I didn’t know honestly how it would impact the organization long-term. Coming back, I have no doubt whatsoever that it was good for me, and it was good for the organization.” – ED

Increased demand for services, dependence on external resources, high workloads, lack of personnel, and the often-subsequent burnout of nonprofit leaders threatens the ability of nonprofit organizations to fulfill their missions. In order to address these challenges, in 2014, the Fieldstone Foundation and the Clare Rose Foundation partnered to launch the Clare Rose Sabbatical Program (subsequently referred to as the Sabbatical Program). The Sabbatical Program offers up to four grants each year to nonprofit organizations in San Diego and Orange Counties to provide executive directors (EDs) with an opportunity to disconnect from

their organizations through an extended paid leave. Additionally, the Sabbatical Program offers guidance and financial support to assist the organizations before, during, and after the sabbatical. The Sabbatical Program is intended to support the well-being of nonprofit leaders, build organizational capacity, and elevate leadership within organizations.

Shortly after the Sabbatical Program began in 2014, the University of San Diego’s Caster Family Center for Nonprofit and Philanthropic Research (Caster Center) was commissioned to conduct a 5-year systematic evaluation of the program. This report summarizes the findings from Year 2 of the evaluation. Between November 2015 and January 2017 the Caster Center evaluation team collected data through interviews and surveys with EDs, staff, and boards from all four participating organizations, and an interview with a nonprofit consultant hired to support each organization.

The findings suggest that sabbaticals, when implemented with both the ED and the organization in mind, can serve as a catalyst for capacity building that can ultimately strengthen and sustain nonprofit organizations. Two years of data demonstrate that the Sabbatical Program:

1. Strengthens nonprofit leaders:

The greatest and most immediate impact of the Sabbatical Program was on the EDs and the internal interim leaders (interim leaders). EDs showed noteworthy improvements in their well-being and their ability to use a systems-thinking approach to leadership. EDs, staff, and board recognized positive shifts in the EDs’ work-life balance and physical and emotional health, which ultimately allowed them to think more strategically and focus on the big picture. Interim leaders improved their communication skills and grew in their capacity to delegate to and lead staff, solve problems, and make decisions on behalf of the organization.

“I learned that sabbaticals are not a scary thing if a strategic plan is in place and preparations are made in advance. In so doing, the organization benefits with fresh thinking and perspective.” – Board

2. Shows promise as a tool for organizational capacity building:

Significant gains were made during the sabbatical, including: 1) interim leaders and staff learned new skills and developed a broader understanding of the organization; 2) boards became more involved; 3) boards, staff, and interim leaders shared leadership and improved communication; 4) EDs made some changes to their organization's structure and policies. However, in some cases, sustaining that growth was either hindered or not yet apparent when the post-sabbatical data were collected.

“Overall, I am grateful our organization was able to participate in the sabbatical program. It was a healthy growing experience for all involved, and has made us stronger. Thank you.”
– Staff

3. Has the potential to contribute to a vibrant nonprofit network:

In Year 2, the Sabbatical Program began to raise awareness about the inextricable link between the well-being of nonprofit leaders, the capacity of organizations, and the subsequent health of the nonprofit sector. As the Sabbatical Program enters Year 3, communicating its positive impact to funders as well as nonprofit leaders and boards will be an important area for continued growth.

Although the Sabbatical Program had a positive impact on all four participating organizations, the staff, board, and EDs also confronted challenges during and after the sabbatical. This is not a failure of the program, but rather evidence of organizations undergoing significant change. Some of the challenges are inevitable, while others can be addressed through modifications to the program. Hence, in the spirit of continuous growth, instituting the following recommendations may further increase the impact of the Sabbatical Program. Note that more detailed recommendations are provided in the report.

- Screen organizations carefully to ensure they are prepared to weather a significant disruption.
- Provide greater assistance with the preparations for the ED's absence and the reentry process after the sabbatical in order to maximize impact on organizational capacity building. Involving staff more in both preparations and reentry is essential.
- Require past sabbatical recipients to share their stories with potential applicant organizations in order to assist with recruitment of future organizations to the Sabbatical Program.

Change does not come easily. The Sabbatical Program, like any change-making initiative, was a disruption to each organization. In evaluating the impact of the Sabbatical Program, it is crucial to resist categorizing challenges and tensions that emerged as evidence of failure. In fact, the challenges, when addressed carefully and strategically, invite increased engagement and may signal an organization or individual that is growing or maturing. The findings from the first two years of the Sabbatical Program support previous evaluations of nonprofit sabbaticals and provide demonstrable evidence for funders that investing in the well-being of nonprofit leaders can ultimately strengthen both organizations and the sector.