



Sabbatical Planner

Introduction To This Planner

There were times in my life when I knew I needed a break, or I would break. The hectic pace of work, family, and community service all take a toll on our mind, body and spirit. By taking some time away from the office, I was able to rest, refresh, and put things into perspective.

It was the experience of taking extended vacations or leaves of absence that helped me to cope with the burden of stress, rekindle passion for my work or, in some cases, to make a change in my work.

When I returned from each break, I found the short rest had improved my outlook, my attitude, and my performance on the job. Yet, it wasn't until I took a full-year sabbatical, that I realized how important those shorter breaks were to my sense of well-being.

My journey included traveling around the U.S. in an RV. It was an economical way to travel and camping in natural settings provided the perfect venue for serious rest and reflection. You can read about my sabbatical on my blog, *Beach Nana Travels* at beachnana.com.

This planner is for you. If you are over-stressed, have reached a point of boredom, or lost your passion for your work then perhaps it is time to consider a break, a pause, a sabbatical.

Although by no means an exhaustive reference on the subject, this planner will help you to think through the idea of an extended leave of absence from your job. It grew out of reflecting on my own experience and, hopefully, will provide a starting point in your journey.

I encourage you to work through the questions slowly and thoughtfully. The answers are for 'your eyes only' and the cold honesty with yourself begins a healing process that will continue throughout your sabbatical.

I wish you all the best in creating a vision for the next chapter of your life!

Robin North
BeachNana.com

Where Do I Begin?

Ah, the dream of taking a few months off from work to research, rest or even plan a new career direction may seem impossible for most people. A few companies have a sabbatical or extended leave policy and, if your organization is one of them, your quest for a sabbatical may already have a path to follow. If your organization is not familiar with the sabbatical concept, there is still a possibility to take an extended leave of absence to achieve your goals. With careful planning and a little discipline, you may be able to realize that dream.

People want to take sabbaticals for a variety of reasons. Some want to use the extended time away to do research related to their work. Others need a break from the constant stress of their jobs. And still others need to step back and assess where they have been, where they are, and where they are headed.

The idea of taking an extended leave from your career can be daunting or exhilarating depending on your situation. If you are focused on research for your work the planning snags will probably come in making arrangements rather than what you will do during a sabbatical. Many institutions based in research or education have sabbatical policies in place, so presenting your goals may be your primary concern.

On the other hand, if your reason for a sabbatical leave is about preventing burnout or assessing your career, then your challenges will be justifying your absence to your employer. They will want to know how you will use the time to improve your work and how you will delegate your responsibilities in your absence.

There are a few questions you need to answer to determine what kind of sabbatical you should take, how long you will need, and how this time off will benefit your career and life. Being able to articulate why you want to take a sabbatical will go a long way to helping you justify it to your family and your organization. The following questions should help you clarify your thinking and, perhaps, help you begin planning.



Why do you need time off?

Be specific and be honest with yourself. These answers are for 'your eyes only'. In the case of burnout, are you merely escaping a difficult situation that you will return to, or will the time off help you to resolve the situation? If you are assessing your career and considering alternate future paths, how will taking time off help you in that endeavor? If you are doing research, how will the results enrich your work and career?



What will you do during your sabbatical?

If your sabbatical is research-oriented, you will want to list the resources you need to consult as well as how you will process the resulting information. If you are escaping burnout, activities that help

you heal are important as well as those that help you learn skills to mitigate the burden of stress. For those planning for their career, you might want to identify a mentor to guide you, and activities to clarify your career journey thus far. For any sabbatical, make time for rest, relaxation, and reflection.



How long do you think you need away from work?

We all would love to take a year off to reflect, research or rest, but realistically that may not be possible. The negotiation for your sabbatical may determine its length. Yet, it is important to identify the goal of your sabbatical and how much time it will take to conduct the activities leading to the achievement of that goal. If your organization offers less time than you need to achieve your goal, can you divide the work into discreet parcels to be accomplished during a sabbatical, subsequent vacations, and holidays to complete it? For research purposes and career evaluation, this is a real possibility. For burnout, you may have to work a little harder to persuade your organization that the extra time you want is truly necessary. Otherwise, can you reign in your expectations to fit the time offered? If not, will you try to re-negotiate the terms?



Is there any other way to achieve your goal? If not, what might be the impact of your absence?

Sometimes taking a short break can make all the difference. Have you considered taking a short break to test the impact of an extended leave of absence? Taking a short break may help you to plan how you will use your time during a sabbatical. You might consider it a "test run". This test run can also help you plan how you to delegate your work during your absence, and assess the impact on your colleagues. Ask yourself if there is any way to achieve your goal within your normal time off, such as weekends, holidays, or vacations? Could you combine any of these to get a longer chunk of time-off? If not, what plans will you have to put in place to distribute your work to others?



When you return from sabbatical, what changes do you expect in your attitude towards work, your colleagues, your future career plans, and/or your life goals?

Here is where the rubber meets the road. Taking time away from work must have a benefit to either your life goals or your career goals. What do you want to get out of this time off? If you are burned out, you might expect to rest as well as work through activities to help re-ignite a passion for your work. Consider the impact this time off will have on your career performance and in your life. If you are planning your future, how will you measure the return on investment for this time for you and your employer? As a research sabbatical, will the results move you forward in your work and bring

significant personal satisfaction? And, no matter what your reasons for a sabbatical, consider how this time will enrich your personal life and relationships.

Imagine yourself at the end of your sabbatical. How are you different as a result of this time spent away from work? Consider your work, career and your personal life in the equation.

The answers to these questions will help you to determine why you need a sabbatical, how long it should be. Additionally, you might develop an idea of the goals for the time away, and consider its impact when you return to work.

Preparing For Your Sabbatical

So, perhaps, you are now seriously considering a sabbatical or, at the least, a “pause” from your work. Having worked through the first section of this planner, you have outlined potential goals, how to justify your sabbatical in terms of need vs wants, and how much time you will need away from the office.

The next section of questions will help you to shape your time off, identify activities, resources, and travel needs. Additionally, we have included questions to help you in approaching your organization and your family about a sabbatical leave. These questions are by no means definitive but they will give you a starting point for planning a sabbatical that makes sense for your life and career.

Getting ready to take a sabbatical is a bit more involved than just making travel plans. You will want to consider your goals for this time off and what activities are involved in achieving those goals.

Review your answers to the questions from the first section of this planner and consider them as you work through the following:



What do you want to accomplish?

If rest from stress is what you need, could you identify some new coping skills to learn during sabbatical? Can you review your priorities and identify stress-producing patterns there? Evaluate your workload and responsibilities. Are there adjustments to be made there? Do you need to correct self-expectations, people pleasing, or other emotionally draining habits? What about attending to sleep and good health regimens.

If you are more in the camp of setting new goals for your life and career, you might reflect on where you have been and how you have reached this stage. Then, you'll want to consider your current trajectory and how it lines up with your career or life expectations. If you are on a trajectory you do not like, how will you make adjustments to be on course for your desired goal? If you are on course, what are the next steps you will take to continue your career?

If your sabbatical goal includes research, what do you hope to discover and how could you interpret that in terms of your work? What studies do you want to conduct? What reading and writing are encompassed in your goals?



What activities will help you do that?

Make a list of books you should read, seminars or classes to take. Are there other organizations you should visit to learn their methodologies? Identify people you would like to interview, have discussions with, or ask to be a sounding board for your discoveries.

How will you assimilate all the new information you are taking in? Do you need quiet walks or immersive experiences to help you work through that new information? Will you capture your explorations in writing or voice notes? How will you compile and summarize the salient points?

What will you do for relaxation and rest? Adequate reflection takes time and a clear mind. Are there hobbies or activities that will help your mental clarity and focus?



Is there a setting that is more conducive to achieving your sabbatical goals? Or, is there a place you must visit to find the resources for completing your sabbatical work?

A setting that encourages you to work on your sabbatical goals is important. For some, a home study is perfect for reflection, research, and writing, but for most, it is a good idea to change the scenery. It takes you out of your comfort zone, reduces daily distractions, and prepares your mind for change.

As for a preferred setting to process information, do you enjoy sitting at the ocean's edge and listening to the sound of the waves? Or, is the serenity of a woodland hike more helpful for reflection? What areas nearby qualify as good candidates for your sabbatical time? If there are none nearby, how far do you have to travel to find a good setting for your sabbatical?

Where you go may be dictated by where you can find the information you need. Is what you need to learn available from a university or can you adequately glean the information from books and interviews with experts or professionals? If you need help from a professional, does your setting have to be close to their offices, or can you arrange for phone discussions or email questions? If you need university or library resources, is there one close by or do you need to travel to find what you need?



If you need to travel, what arrangements will have to be made?

If you have to travel, make a checklist of what arrangements need to be made and any time restrictions. Do you need to make appointments with others or will you work at your own pace? Do you have any travel limitations due to time, budget or health? What type of accommodations, travel, and meals have to be planned and secured?

If this sabbatical is designed to help you de-stress, reflect, and assess strategy you may need to seek out quiet places that have fewer travel complications. Could you go camping, rent a cabin in the woods or find a quiet beach cottage? Any can be a good setting for reading, writing, rest and reflection. Or, you can try multiple places in succession, changing your setting according to a pre-determined time frame or subject matter.



What financial preparation do you need to make?

Is this paid time off or do you need to dip into your savings? If you are self-financing your sabbatical, then you will want to review your budget, designate the amount available for your sabbatical, and plan accordingly. Can you find places close to home, within a reasonable driving distance or do you need to book a flight to a more distant destination? Airfare, hotels and rental cars will make a dent in your budget whereas driving and renting a cabin or cottage may be a more affordable option.

For research, are the resources you need found in only one place or are they scattered? Can you arrange your travel to make fewer trips giving you more time with your resources and spending less time and money on travel?



Discuss your plans for sabbatical with your spouse or family

How will the sabbatical impact your family life? Talk about your sabbatical with your spouse and family to address concerns and identify additional planning needs. Outline the reasons for your sabbatical and the goals you hope to achieve for your career. Make sure you identify the benefits for your family life as well. Does this sabbatical include family time or is it a solitary journey? Perhaps you would like it to serve both purposes. Can you schedule time when you will be on your own for sabbatical work and when you will be with the family for relaxation and fun? You may need to arrange quiet mornings for yourself and activities with the family in the afternoon, perhaps returning to your sabbatical work in the evenings.

If your sabbatical time needs to be solitary, make arrangements in advance for any family duties and children's activities or celebrations. Can an extended family member or family friend help out while you are away? Discussing your sabbatical with the family will help ease the anxiety of separation.



Beginning the conversation with an employer about sabbatical

Some companies and organizations have formal sabbatical policies. Make sure you review those policies and plan your sabbatical with those in mind. If you need to step outside of the formal policies, be ready to negotiate and justify the additional time or resources.

If your organization does not have a formal sabbatical policy, investigate any extended leave programs to see if they could include, or be interpreted as, a sabbatical.

Identify the people in your organization who can provide additional information and those who will support your request. Prepare an outline for a conversation with your employer including the issues leading to your sabbatical request, goals for the time away, return on investment for the organization, and the anticipated results. Review it with a trusted colleague for questions or issues it might raise.

Make sure you have a plan to delegate your workload with the least impact possible on colleagues. Are there projects that can be delayed or completed prior to your departure? Can you identify a subordinate to monitor projects in process with someone at a higher level to act as a mentor? This not only handles the workload but also develops future leaders.

Preparing thoughtfully for a sabbatical, sharing your goals and planning can help you garner support from your family and organization. Considering the impact on others will help you to reign in unnecessary time or expenditures. Once you have made your case to your organization and family, have secured their approval and support, the next steps will be the real work of the sabbatical itself.