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**Dinsmore, Katherine A. *Non-Academic Workplace Sabbaticals: HR Perceived Benefits***

**Abstract**

Although numerous authors and researchers have written about non-academic workplace sabbaticals, few have investigated benefits to the organization, as opposed to the individual, from the perspective of Human Resources (HR) professionals specifically. Furthermore, there is a dearth of reporting as it relates to return on investment (ROI) from companies with a sabbatical program in place making it difficult for organizations to ascertain the financial implications of introducing sabbaticals as part of their own benefits package. The current study makes use of a mixed-method design to survey HR professionals from the United States who are responsible for the oversight of policies and protocols impacting employee relations including recruitment and retention strategies, compensation, benefits, health and wellness programs, professional development, and personal well-being, thus positioning them for an insider perspective on the organizational benefits of paid and unpaid sabbaticals. Results of this study indicate that 85% of companies who report having a sabbatical program at this time are not objectively measuring the success or failure of this much sought-after benefit despite the fact that HR professionals perceive recruitment, retention, productivity, professional development, corporate social responsibility (CSR) goal fulfillment, and employee recognition as significant benefits to the granting organization. Future researchers of non-academic sabbaticals would be well-served to investigate and report on perceptions from other high-level employee groups as well as specific ways to objectively measure each unique benefit as it relates to ROI in an effort to support others trying to advocate for the use of sabbaticals in their own non-academic workplace.

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## **Chapter I: Introduction**

Workplace sabbaticals outside of academia are gaining in popularity with an increasing number of organizations touting their presumed benefits. Sabbaticals are often viewed in terms of benefits to the individual: restoring work-life balance, preventing burnout, or pursuing personal interests. The present study, however, seeks to contribute to the growing body of literature that highlight benefits to the granting organization.

### **Statement of the Problem**

Numerous authors and researchers have investigated and written about the use of sabbatical programs in academic institutions as well as non-academic institutions (Benshoff & Spruill, 2002; Gordon, 2002; Kramer, 2001; Leung et al.; McDearmid, 2014; Pagano & Pagano, 2009; Persoff, 1945), yet there continues to be a lack of reporting that speaks to how sabbaticals benefit the organization versus the individual, specifically from the perspective of Human Resources (HR) representatives. HR representatives are responsible for the oversight of policies and protocols impacting employee relations including recruitment and retention strategies, compensation, benefits, health and wellness programs, professional development, and personal well-being, thus positioning them for an insider perspective on the organizational benefits of paid and unpaid sabbaticals. In addition, there is a paucity of literature that indicates how success or failure of sabbatical programs are being measured objectively, making it difficult to ascertain the impact to the organization's bottom line.

### **Purpose of the Study**

The main purpose of this research is aimed at understanding how HR professionals perceive the organizational benefits of their current sabbatical program. A secondary purpose of this research is to determine what percentage of companies with a sabbatical program are

quantifying benefits using evidence-based measures versus reporting benefits by less formal means (i.e., anecdotally, subjectively). Lastly, the present study is poised to address prior appeals by Leung et al. (in press) and McDermid (2014) to identify which evidence-based practices are used for measuring the success or failure of sabbatical programs in non-academic workplaces. Moving the discussion forward is a necessary step in understanding how to quantify the organizational benefits derived from implementing a sabbatical program.

### **Types of Sabbaticals**

Rogak (1994) describes four main sabbatical models: (a) Paid Leave, (b) Unpaid Leave, (c) Social Service Leave, (d) Voluntary Work-Reduction Leave. Generally speaking, these four types encompass the broader spectrum of sabbatical configurations used in the workforce today.

#### ***Paid Leave***

Time allotted for paid leaves typically range anywhere between six weeks to four months with employees collecting either full or partial salaries during their time away. Employee benefits such as health and dental insurance, health savings accounts, retirement perks, et cetera customarily remain intact, as does the individual's position (Rogak, 1994).

#### ***Unpaid Leave***

As the name implies, sabbatical configurations under the umbrella of unpaid leave do not compensate the individual financially while away. This type of sabbatical is often used to extend accrued vacation time in cases where employees need additional time off for personal endeavors, family-related matters, or other aspirations that demand more time than currently available through time amassed. Unlike paid leaves, employee positions are not always guaranteed upon return. However, similar to paid leaves, benefits typically remain intact for a reasonable period of time determined as by the organization (Rogak, 1994).

### *Social Service Leave*

Social service leaves give employees the opportunity to volunteer their time and expertise to an organization outside of the one employing them. Often times, this type of leave is coordinated with the granting organization to meet corporate social responsibility (CSR) goals benefiting the employer, employee, and volunteer recipient(s). Because this arrangement benefits more than just the sabbatical taker, full compensation and continuation of benefits are typically provided by the employer (Rogak, 1994).

### *Voluntary Work-Reduction Leave*

Similar to Persoff's concept of reducing the workforce for temporary economic relief and recovery, this variety of sabbatical gives employees the option of taking unpaid time off so the organization can mitigate economic fluxes. Rogak (1994) likens it to "what happens when an airplane is overbooked, and you trade your seat for one on a later flight and get a few goodies in return" (p. 16). Ongoing benefits and work-guarantee, assuming the company stays afloat, are just two examples of "goodies" with this type of sabbatical (Rogak, 1994).

Each of the aforementioned sabbatical types fall into one of two broader categories: working and non-working sabbaticals. Working sabbaticals are primarily considered social service leaves and often fall under the umbrella of CSR programs in coordination with one's employer. For example, consulting agency Earnst & Young reinforces a corporate culture of sustainability by granting social service leave to employees who then lend their expertise in green initiatives to organizations in developing countries (Clancy, 2012). Non-working sabbaticals encourage awardees to spend their time pursuing goals important to them. For instance, individuals may choose to travel, pursue educational goals, or simply spend quality time with family and friends.

## **Methodology**

To evaluate how HR professionals perceive non-academic workplace sabbaticals, an electronic survey was administered to senior level HR employees of companies, headquartered in the United States, offering paid or unpaid sabbaticals. Survey items were designed to answer the overarching questions of whether HR professionals perceive their current sabbatical program as beneficial to the granting organization and whether Return on Investment (ROI) is being measured objectively.

## Chapter II: Literature Review

The term sabbatical is thought to originate from the Greek word *sabbaton*, which itself comes from the Hebrew word *shabbāth*, or “rest” (Merriam-Webster, n.d.). References to a “day” of rest can be found in multiple religious references but the *Old Testament* mentions a “year” of rest in Leviticus 25:3–5, saying, “For six years you shall plow your field, for six years you shall prune your vine and gather its produce. But in the seventh year the land is to have its rest, a *sabbath year for Yahweh*...” (Kimball, 1978, p. 311). Additional references to a year of rest can be found in the biblical books of Exodus and Deuteronomy (Bak, 1959) dating to the seventh century B.C.E. when Israeli farmers had a religious responsibility to halt farming efforts every seventh year, a practice recognized in the Jewish community as *Shmita* (Blake, 2019). This practice, described in the Torah, was intended to have multiple personal and community benefits, expressed by Krantz (2016) as “a biblical prescription for and inoculation against environmental and social problems, including habitat destruction, hunger, overwork, soil-nutrient loss, unabated growth, wealth gaps, and the disconnects between people and their food and people and the Earth” (Introduction section, para. 1). Simply stated, the sabbatical year was meant to be restful and rejuvenating for both the land and those who depend upon it (Blake, 2019).

Over the next 2000 years, biblical and environmental restraints led to an unsustainable burden on farmers in the Jewish community which resulted in “environmental and components of the biblical laws [being] pushed aside, widely through rabbinic-sanctioned exceptions and loopholes” (Krantz, 2016, Introduction section, para. 1). During that time, *Shmita* was rarely observed outside of Israel’s most conservative Orthodox groups (Krantz, 2016). More recently however, in response to widespread environmental concerns, *Shmita* has been reintroduced

through a number of initiatives led by Jewish communities in the United States and abroad (Krantz, 2016).

While rooted in religion and agriculture, sabbaticals began to flourish in academia as well. According to research conducted by Walter Eells (1962), fifty pioneering institutions had implemented sabbatical programs between 1880 and 1919 with Harvard University being the originator (pp. 253–254). Despite the Shmita having more community-enhancing goals, academic sabbaticals were originally intended to provide faculty members with time to pursue professional goals such as conducting and reporting on research or improving courses and curriculum (Brazeau & Van Tyle, 2006). Regardless of individuals being the obvious beneficiaries, Eells (1962) reported that benefits to the institution were asserted as far back as 1907 by the Committee of the Trustees of Columbia University, quoting them as saying “The practice now prevalent in Colleges and Universities of this country of granting periodical leaves of absence to their professors was established *not in the interests of the professors themselves but for the good of university education* [emphasis added]” (p. 253). Interestingly, then, in more recent years the majority of literature specific to sabbaticals in academia focuses more on anecdotal evidence illuminating benefits to faculty members—professional development, research, personal growth and/or rejuvenation—than it does the institution, especially as it pertains to empirical evidence impacting the financial commitment necessitated by the administration (Brazeau & Van Tyle, 2006; Kang & Miller, 1999; Sima, 2000). Therefore, while existing literature makes a strong argument for how sabbaticals benefit the individual anecdotally, it tends to fall short in helping the reader understand how benefits to the institution are measured objectively or what the financial impact is to the institution’s bottom line. Factors

that some may argue are critical in the ongoing support of sabbaticals continued use in academia (Dingfelder, 2009).

### **Non-Academic Workplace Sabbatical History**

Sabbatical use outside of academia was a relatively foreign concept until industry frontrunners like McDonald's Corporation, IBM, Time-Warner, and Intel implemented them in the 1970s and 80s (Kramer, 2001; Otto & Kroth, 2011; Stevenson, 1995). Law and accounting firms also began utilizing sabbaticals around the same time, recognizing them as a tool for recruitment and retention, as well as having the added benefit of strengthening client relationships between partners in the firm while awardees were away (Gordon, 2002; Pagano & Pagano, 2009). Hardware and software developers in the technology industry were especially prone to working long hours with extreme deadlines during the early 1990s, as computers and the Internet became more accessible to the public. By the new millennium, Daniel Kramer (2001), author of *Workplace Sabbaticals—Bonus or Entitlement* concluded that “ten percent [would be] a good guess for Silicon Valley firms [offering some form of sabbatical to their employees]” (p. 20). According to a report comparing data over twenty years and published by The Society of Human Resource Management (SHRM), paid and unpaid sabbaticals combined in non-academic workplaces reached 33% by 1996 (SHRM, 2016, p.8). However, in the same report, SHRM reported a significant decrease in unpaid sabbaticals between 1996 (27%) and 2016 (12%) and no significant change in paid sabbaticals during the same period (6%, 4%). More recent reporting indicates no significant changes, with unpaid sabbaticals declining slightly to 11% and paid sabbaticals staying relatively constant at 5%. (SHRM, 2019, p.7).

It is possible that in addition to the benefits individuals gain from taking a sabbatical, there are significant benefits to the organization and thus the practice should be encouraged more

often in non-academic workplaces than is currently taking place (less than 20%). On the other hand, if the benefits prove to be one-sided with little-to-no real benefit to the organization, administrators may want to seek alternatives that are mutually beneficial.

Albert Persoff called attention to the use of sabbaticals in his book *Sabbatical Years with Pay* in an effort to minimize unemployment and aid in economic recovery after World War II (Kramer, 2001). Although Persoff's counsel for sabbaticals did not catch on immediately, steel and aluminum workers did adopt the concept in the 1960s to allow fair distribution of work and retraining (Axel, 1992, p. 11). Persoff argued that the workforce could be reduced by nearly 15% without compromising productivity. Therefore, one-seventh of the workforce could be granted twelve months off, fully paid, while the remainder of the workforce managed the workload with increased enthusiasm knowing they too would receive a year off with full pay in the future. Rotating the workforce in this way would help avoid mass layoffs (Kramer, 2001). Since then, several companies spanning various industries have used sabbaticals to help prevent employee layoffs in times of economic hardship, with a more recent example pointing to technology giant Intel Corporation. Intel extended the leave time to their existing sabbatical policy to help offset the losses caused by the Coronavirus Disease 2019 (COVID-19; Hinchliffe, 2020). Intel, along with Tandem Computers, was also one of the first companies to implement sabbaticals in corporate America (Stevenson, 1995). Not surprisingly given its fast-paced and competitive nature, the technology sector was at the forefront of embracing sabbaticals as a way to attract new talent by adding it to their employee benefits package in an effort to "enhance the status of the employer" (Stevenson, 1995, p. 55). Sabbaticals as a benefit continued to gain momentum industry wide over the next several decades as a means of increasing the likelihood of employing a strong and stable workforce.

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### **Benefits to the Individual**

The United States has long been characterized as an individualistic society who prioritizes the individual over the group, unlike a collectivist society who prioritizes the group over the individual. Cummings and Worley (2015) define *individualism* as "the extent to which a country's culture supports individual growth, development, and achievement" (p. 787). Given

this perspective, it is understandable that a good portion of existing literature on sabbaticals in the United States emphasizes benefits to the individual versus benefits to the organization. Worth noting however, is that the majority of evidence regarding benefits to the individual outlined below has not been substantiated through objective measures or rigorous studies but rather reported anecdotally in magazine articles, public websites and blogs, or subjectively from interviews and survey responses. While presumed benefits to the individual appear to be wide-ranging, several dominate themes have emerged.

### ***Personal Development***

Career aspirations from childhood seldom translate to the reality of working in adulthood. Consequently, individuals must pursue personal goals on their own time. In today's increasingly demanding workforce, finding time to make that happen can be difficult. Sympathetic employers understand this dilemma and institute programs like sabbaticals to give their workforce an opportunity to grow personally. For example, companies like Wells Fargo, American Express, and Accenture have enabled their employee to learn new languages, advance their education, travel, volunteer, write, teach, and more (Axel, 1992; Chao, 2006; Deutsch, 1991; Gordon, 2002; Santonocito, 2017). Whether individuals are driven to work on themselves personally or professionally, it is important to strike a balance between the two in an effort to achieve work-life balance (Munn, 2013).

### ***Work-Life Balance***

*The Cambridge Dictionary* (n.d.-b) defines *work-life balance* as “relating to the amount of time you spend doing your job compared with the amount of time you spend with your family and doing things you enjoy.” Much has been discussed in print literature and online forums regarding what qualifies as a balance between one's work and home life and how beneficial it

can be when achieved (Axel, 1992; Hassell, 2019; Kohll, 2018; Whalen, 2017). Suffice it to say, the line between work and home as separate entities has become increasingly blurred with advancements in technology and increasing workloads for many (Bolden-Barrett, 2018; Nam, 2013). Employers concerned with negative outcomes stemming from this dilemma have turned to various initiatives like flexible scheduling, health and wellness programs, sabbaticals, and beyond to help counter the imbalance that can occur when achieving a healthy balance is neglected (Bourne et al., 2009; Hassell, 2019; Munn, 2013). In doing so, employees report feeling more connected to their friends and families, newfound passion for both work- and life-related activities, and an overall sense of balance between the two (Carr & Tang, 2005; Hassell, 2019; Olson, 2019).

### ***Burnout Prevention***

The World Health Organization International Classification of Diseases (ICD-11) defines *burnout* as “[a syndrome] resulting from chronic workplace stress that has not been successfully managed [leading to feelings of] energy depletion, job-related cynicism, and reduced professional efficacy” (World Health Organization, 2019). In high-impact professions such as medicine, burnout can lead to increased suicide rates and other health-related issues (Hassell, 2019; Swenty et al., 2011). Naturally then, it comes as no surprise that employers would want to minimize the effects of employee burnout. Sabbaticals are one approach that organizations have leaned on to curtail burnout since their evolution into corporate America. Tandem Computers began offering sabbaticals after noticing “that a lot of good people were burning out and quitting by the fifth year” according to HR Director Jim Barr (Deutsch, 1991). Susan Hall, a benefits administrator for Adobe Inc., echoes the sentiment when saying she “sees [their sabbatical policy] as an employee de-stressor and a tool for avoiding burnout...” (Semas, 1997, p. 123).

Barr and Hall reflect the opinions of leaders in dozens of other organizations offering sabbaticals to their employees. Unfortunately, according to Leung et al. (in press), reducing burnout is more complicated and cannot be solved using one perfect strategy (Introduction, para. 1). Therefore, employers may want to consider the unique characteristics and goals of their organization before attempting to employ a one-size-fits-all approach when formulating a sabbatical program to address burnout.

### **Benefits to the Organization**

Recall that the United States is known to be a society that emphasizes the individual over the group; therefore, the tendency to report on how sabbaticals benefit the individual, versus the organization, is much more prevalent. This report serves to balance the equation by giving more emphasis to the organization.

Since gaining popularity in non-academic workplaces, sabbaticals have been utilized by organizations for recruitment, retention, heightened productivity, professional development, succession planning, CSR, economic relief, and an employee recognition and reward mechanism. But again, given the scarcity of scientific-based evidence, the benefits outlined below have been primarily reported anecdotally or subjectively by business owners and managers versus objectively measured, unless otherwise indicated.

### ***Recruitment***

Several companies (e.g., PayPal, Adobe, Perkins Coie) vying to appear attractive to new potential recruits have used sabbaticals as a way of standing out from the competition and attracting both recent graduates and experienced professionals making a career transition whereas other companies, like consulting firm Robert Half International, do not necessarily see sabbaticals as a draw. Carol Gebet, manager at Robert Half, makes this clear in discussing her

own experience when she discloses how rare sabbaticals are brought up in salary negotiations by applicants and even more rare that companies market them to entice potential employees (Semas, 1997, p. 123). She goes on to say that with unemployment at an all-time low and fierce competition amongst employers, employees are rarely with a company long enough to qualify for a sabbatical (Semas, 1997, p. 123). However, Robert Half may be more the exception than the rule, as a more recent Meta-analysis of 68 studies, including a total of 52,738 employees, conducted by Onken-Menke et al. (2018) found a positive association between sabbaticals as a flexible work practice (FWP) and employer attractiveness (p. 239). So, while evidence suggests that sabbaticals do move the needle in favor of the company offering them, is it enough to keep newly recruited employees around for an extended period of time, and if so, at what cost?

### ***Retention***

Failure to retain employees can be disruptive and costly to the organization. Unfortunately, retaining employees long-term can be even more challenging when unemployment rates are low and skilled individuals are in high demand. In such scenarios, businesses must continually find ways to build employee commitment and loyalty to maximize their human capital investment. One survey conducted by LinkedIn ( $n = 10,000$ ) cited lack of opportunities (45%) and wanting more challenging work (36%) as reasons for seeking employment elsewhere in high turnover industries (Booz, 2018). Companies like Accenture and Cisco are using sabbaticals as a way to enable their employees to take time off to volunteer and share their skillsets with non-profit organizations while maintaining employment and benefits (Chao, 2006). At first glance this strategy may serve to benefit the individual more so than the organization, but considering the cost incurred for replacing dissatisfied employees—approximately 30% of ones' annual salary (Work Institute, 2020)—and the perceived boost of

attractiveness to the organization for lending their resources, the arrangement clearly benefits both parties. Since becoming more common in corporate America, some would argue that sabbaticals are a better tool for retention than recruitment (Semas, 1997). At Intel, employees start planning their sabbatical up to two years in advance so during that time anticipation builds and morale is boosted which leads to reduced turnover as well according to Paula Sanderson, Intel's Global Benefits Manager (Tyler, 2011). Greentech, Inc. also views their sabbatical program as a means of reducing voluntary turnover as employee departure after the initial 3–4 years of employment decreased significantly following establishment of a sabbatical program (Axel, 1992, p.33). Retention remains an ongoing concern as younger generations are more prone to moving from job-to-job at a much quicker pace than older generations according to the *Job Hopping Analysis: Trends by Generation & Education Level* report published by LiveCareer and TIRO Communications (2018, p. 9). Therefore, finding ways to keep employees loyal, challenged, and evolving as professionals is key to retaining your most valued workers.

### ***Productivity***

David Burkus, best-selling author, award-winning podcaster, and management professor, offers the following anecdotal insight: “the best way to stay productive all the time is to spend a good portion of it being deliberately unproductive” (Burkus, 2016). While it is easy to theorize increased productivity following a sabbatical, objective research on productivity gains is limited. Employees returning from sabbatical report feeling refreshed, rejuvenated, more creative, and full of vigor making for a more engaged and productive employee (Bolch, 2006; Bradford, 2001; Gordon, 2002). In addition, those left behind to cover the workload also contribute to heightened productivity by assuming more responsibilities and/or stepping into new roles while coworkers are away on sabbatical leave (Kirk et al., 2000; Otto & Kroth, 2011; Tyler, 2011).

### *Succession Planning*

Broadly defined in an article written by Ip and Jacobs (2006), *succession planning* is a “deliberate and systematic effort by an organization to ensure leadership continuity in key positions, retain and develop intellectual and knowledge capital for the future, and encourage individual enhancement” (p. 327).

After completing a study commissioned by several nonprofit organizations to evaluate existing sabbatical programs, Deborah Linnell and Tim Wolfred suggested using sabbaticals for succession planning in a deliberate effort to trial-run potential interim leaders for advancement while executive directors are absent on sabbatical, calling it “creative disruption” (Linnell & Wolfred, 2009). Advantages to the organization appear to be two-fold: first, it builds confidence in choosing future leadership, and secondly it identifies which candidates would benefit from further development opportunities before setting them up for failure in new roles (Linnell & Wolfred, 2009).

According to Burkus (2017), three-time author and columnist for the *Harvard Business Review*, sabbaticals have become a safe way for business leaders to test would-be future leaders prior to making any permanent changes to the organization chart. Neal Spencer, on behalf of accounting firm BKD LLP, reinforces this notion during an interview where he considers their sabbatical program an enormous aid in developing future talent (Pagano & Pagano, 2009). Hence, even though hiring externally is 18% more common than internal hiring (Carney, 2019), countless companies still prefer to hire within and use succession planning as a vehicle for professional development with the added side-effect of building a stronger workforce through cultivating opportunities and longevity within the organization itself (Seymour, 2008, p. 5).

### *Professional Development*

Unlike succession planning, which is specific to future leadership training, professional development is much broader and works to insure all employees receive the necessary training to excel in their positions. Güttel et al. (2009) identified sabbaticals as a way to prevent proficiency deficits when existing employees fail to maintain the competencies necessary to keep pace with external demands. Güttel et al. goes on to declare that sabbaticals accomplish this by temporarily pausing internal stressors (e.g., extreme workload) and creating the necessary time off to further develop individual skills. Encouraging a culture that fosters ongoing training and growth helps ensure that employees stay challenged and productive which can translate to a thriving organization.

Not all working sabbaticals intended for professional growth are self-directed. For example, two heart clinics devised a working sabbatical to expose cardiac physicians to alternative techniques and cultural practices (Finley et al., 2011). Five cardiologists, three from one hospital and two from another, participated in the initial exchange. In addition to returning to their home institutions with heightened skillsets and cultural awareness, new research initiatives were formulated and the exchange of ideas about complex cases ensued making it a success in the eyes of the granting organizations (Finley et al., 2011). The Mayo Clinic, located in Rochester, Minnesota, is another example of the healthcare profession using sabbaticals to support employee development after credentialing requirements changed in the pharmaceutical industry (Leung et al., in press). Pharmacists were granted “education sabbaticals” to satisfy the new mandates (Leung et al., in press, discussion section). Sabbaticals focused on professional development benefit both the individual and the organization and in some cases, the community at large when combined with CSR programs.

### ***Corporate Social Responsibility (CSR)***

The Cambridge Dictionary (n.d.-a) defines *CSR* as “the idea that a company should be interested in and willing to help society and the environment as well as be concerned about the products and profits it makes.” Hassell (2019) suggests that sabbaticals offer companies a unique opportunity to market their green initiatives to potential employees with similar altruistic values by sharing employee experiences via various media outlets. The benefit is instantaneous at a time where more and more organizations are being held accountable for their carbon footprint and impact on world health. Xerox has been a conscientious stakeholder in the community since the early seventies by offering employees paid leave to volunteer under their *Social Service Leave* program (Xerox, 2011). Between 1971 and 2011, more than 450 employees have taken advantage of the program to pursue self-architected projects aligned with causes important to the individual (Xerox, 2011). In 2020, Xerox continues to be at the forefront of CSR while continuing to support employee volunteer initiatives through their *Xerox Community Involvement Program* knowing that those employed are an extension of the organization and therefore vital contributors in public outreach efforts (Xerox, 2020, p. 32). Leaders of software giant and perpetual awardee of *Fortune 100 Best Companies to Work For*, SAP also recognized the potential of sabbaticals to fulfill their CSR agenda. SAP (n.d.) introduced their *Social Sabbatical* program in 2012 to harness existing talent and develop new talent while simultaneously lending expertise to non-profit organizations with a desire to enhance operations through technology. More than 1,250 employees have helped realize SAP’s vision by volunteering hundreds of hours of their time and expertise worldwide accounting for more than 23 million dollars in social investment (SAP, n.d.). Both SAP and Xerox found a way to create a win-win scenario using sabbaticals to reinforce their corporate mission and provide otherwise far-reaching opportunities

to their employees. Not all organizations can afford to be as generous as SAP or Xerox, both well-established companies generating billions of dollars in revenue annually (Holst, 2020; Liu, 2020), but nonetheless, sabbaticals have the potential to benefit both employees and those employing them.

### *Economic Relief*

Persoff (1945) was a pioneer in suggesting that sabbaticals could be used for economic relief after World War II to help manage massive unemployment rates. In simplistic terms, the idea was to rotate out roughly 14% of the workforce while continuing to pay them. In doing so, those temporarily unemployed would use their compensation to stimulate the economy during their time off more so than if they were permanently without work whereas the labor force currently in place would work harder under the new incentive plan—receiving a paid year off when it was their turn in the rotation—to make up for any loss in production (pp. 77–91).

Although this exact model may not be in use today, employers seeking economic relief and recovery do still consider the sabbatical a feasible alternative to laying people off. One example points to nonprofit healthcare provider Banner Health of Arizona. Banner Health is using unpaid sabbaticals in a sustained effort to prevent having to lay off or furlough employees while hospitals experience less volume and therefore less capital (Innes, 2020).

The current pandemic (COVID-19) serves as an unfortunate reminder that an economic shift can happen quickly with unemployment rates reaching 14.7% in April of 2020 (U.S. Bureau of Labor Statistics [BLS], 2020). Organizations required to comply with federal, state, and local mandates affecting businesses across the country must find creative ways to stay afloat in such unprecedented times. For example, at a state level, COVID-19 restrictions may entail limiting the number of people allowed to socially congregate indoors which economically impacts those

companies who cater to large crowds such as event centers, theatres, and wedding venues. Case in point, at the height of the COVID-19 pandemic, the state of Minnesota prohibited all non-household gatherings for four weeks between November and December of 2020 (Treisman, 2020). In March of 2020, the Defense Production Act (DPA) was called upon by the President of the United States to meet the production demands necessary to defend against COVID-19, deemed a national threat by the federal government (Federal Emergency Management Agency, 2020; Luna et al., 2020). Dozens of companies halted regular production schedules and began retooling machinery to mass produce personal protective equipment (e.g., face shields, face masks, gowns) and medical equipment (e.g., ventilators, cotton swabs) to compensate for inventory shortfalls in the healthcare community. Overall, the economic impact of the COVID-19 pandemic has forced companies to reimagine their day-to-day activities to help circumvent devastating losses. Organizations less impacted by the pandemic may be in a better position to use paid or partially paid sabbaticals to give their employees time off. With so many young children out of school and elderly people unable to leave their homes, tens of thousands working Americans have to juggle unforeseen circumstances such as homeschooling and caregiving. Sabbaticals are one approach employers can take to help minimize the struggle and recognize the challenge their employees are facing.

**Employee Recognition and Reward Mechanism.** Some executives see sabbaticals as a way to invest in future performance by recognizing that well-rested employees return primed for labor and more committed to the organization (Gordon, 2002; Otto & Kroth, 2011). In fact, one study investigating resource gains post sabbatical resulted in significant gains for sabbatical takers compared to those who had not taken one (Davidson et al., 2010) reinforcing that well-rested employees do indeed return recharged and ready to work. Other companies simply want to

recognize they value their employees' hard work and loyalty and offering them a sabbatical presents one way of doing that (Semas, 1997, p. 123). While companies like McDonalds, Adobe, Survey Monkey, and Autodesk continue to use sabbaticals as a mechanism to reward employees for hard work and dedication (Pearl, n.d.), sabbaticals granted for rest and relaxation alone may be dwindling, as more and more organizations may have to justify their efforts based on the bottom line, especially in times of economic turbulence (Wildman, 2012).

### **Need for Objective Measures**

This recent review of literature regarding non-academic workplace sabbaticals indicates by volume alone that organizations providing sabbaticals report doing so for satisfying recruitment, retention, productivity, professional development, and corporate social responsibility program goals to create a mutual win for employees and employers. While this information may be helpful for HR departments weighing the pros and cons of introducing paid and unpaid sabbatical programs, it does little to facilitate an understanding of the various components involved. Therefore, the current study seeks to address these shortcomings by first exploring how Human Resources (HR) professionals perceive organizational benefits of their current sabbatical. To answer this overarching question, two sets of hypotheses will be investigated: the first (hypotheses 1–9) will investigate whether specific and overall benefits (e.g., recruitment, retention) are perceived as beneficial to the organization as it relates to their current sabbatical program; the second, (hypotheses 10–14) will assess whether those perceptions change under varying circumstances (e.g., compensation model, employer- vs. employee-directed).

## Hypotheses

- H1: On average, HR professionals positively endorse the recruitment benefit of sabbatical programs.
- H2: On average, HR professionals positively endorse the retention benefit of sabbatical programs.
- H3: On average, HR professionals positively endorse the increased productivity benefit of sabbatical programs.
- H4: On average, HR professionals positively endorse the succession planning benefit of sabbatical programs.
- H5: On average, HR professionals positively endorse the professional development benefit of sabbatical programs.
- H6: On average, HR professionals positively endorse the fulfilling of CSR goals benefit of sabbatical programs.
- H7: On average, HR professionals positively endorse the economic relief/budget planning benefit of sabbatical programs.
- H8: On average, HR professionals positively endorse the employee recognition/reward mechanism benefit of sabbatical programs.
- H9: On average, HR professionals positively endorse the overall benefit of sabbatical programs.
- H10: The perceptions of overall benefit by HR professionals will differ based on the length of time the organization has offered a sabbatical program.
- H11: The perceptions of overall benefit by HR professionals will differ based on whether the sabbatical program is employer- vs. employee directed.

- H12: The perceptions of overall benefit by HR professionals will differ based on full, partial, or no compensation while away on sabbatical.
- H13: The perception of overall benefit by HR professionals will differ based on whether sabbaticals are limited to certain groups of people (i.e., executive vs. non-executive level employees).
- H14: The perceptions of overall benefit by HR professionals will differ based on whether survey participant themselves have had the opportunity to take a sabbatical.

A secondary objective of this research is to identify any objective measures being used to evaluate the success or failure of sabbatical programs outside of academia. Consequently, participants will also be asked if the organization they represent are measuring ROI objectively and if so, asked to describe any methods or systems in place to do so.

### **Chapter III: Methodology**

Despite growing evidence that non-academic workplace sabbaticals are perceived as beneficial to the granting organization, the majority of benefits identified in both the scientific and business community are based on anecdotal or subjective feedback and seldom identify techniques used to measure outcomes objectively. Furthermore, with the exception of research conducted and reported on- and offline by SHRM, very few published studies or articles solicit the opinions of HR representatives specifically. HR representatives are responsible for the oversight of policies and protocols impacting employee relations including recruitment and retention strategies, compensation, benefits, health and wellness programs, professional development, and personal well-being, thus positioning them for a unique and valuable perspective on the perceived benefits of paid and unpaid sabbaticals. In addition, senior level HR representatives are responsible for measuring outcomes linked to employee benefit programs, resulting in their having firsthand knowledge of any systems being used to measure ROI of sabbatical programs.

#### **Subject Selection and Description**

The target population for the present study consisted of a random sample of senior level HR representatives employed by companies headquartered in the United States. A power analysis based on the *F* test family and one-way analysis of variance (ANOVA) was conducted using the statistical software G\*Power (Faul et al., 1992–2021). A large effect size (.40) was anticipated to obtain statistical power at the recommended .80 level. Results indicated that a sample size of approximately 80 would be necessary. An initial list of HR professionals was compiled using numerous sources: (a) existing literature, (b) company websites, (c) published lists (e.g., Top 100 Best Companies to Work For 2020 published by Great Places to Work), (d)

web-based subscription services (e.g., LinkedIn, RocketReach.co), (e) Internet search engines and databases using key search terms and phrases (e.g., companies offering sabbaticals, paid or unpaid sabbaticals, extended leave benefits), (f) purchased mailing list provided by business-to-business (B2B) database provider InfoClutch. Efforts were also made to obtain member contact lists maintained by both SHRM and Great Places to Work For who annually collect data on organizations with sabbatical programs in place. Unfortunately, both companies declined the request to share that information to preserve the privacy of their members.

Inclusion criteria used to identify qualified contacts for the targeted group included HR job titles (e.g., Vice President of HR, Chief HR Officer) and employment with a non-academic institution residing in the United States. Job titles identified through existing literature, company websites, and published listings were corroborated with LinkedIn profiles. Contacts assigned an email address using the .edu domain were excluded from the master distribution list to avert contacting individuals employed with academic institutions. Lastly, all duplicate email addresses were identified and removed from the master distribution using Add-ins.com Duplicate Finder and Deleter plug-in filter for Microsoft Excel (Flanagan, 2021). The survey was distributed to a mailing list consisting of just over 10,250 contacts compiled using the sources and methods previously identified.

### **Instrumentation**

An electronic database, comprised of more than ten thousand contact names and email addresses identified through the subject selection process listed above, was imported into Qualtrics, a secure online survey platform licensed to the University of Wisconsin-Stout. Qualtrics was used to create the electronic invitation to participate in the survey (Appendix A), consent form (Appendix B), and the survey itself (Appendix C). After consenting to participate,

survey completion took approximately five to ten minutes and consisted of both quantitative and qualitative questions. Quantitative questions were used to assess perceived benefits and the number of organizations measuring the success or failure of their sabbatical program objectively. Qualitative questions were included to capture any non-specified organizational benefits by HR representatives and any methods or systems in place being used to measure the success or failure of the organizations sabbatical program. Industry type, number of years in business, company size, and personal sabbatical experience were also queried.

### **Data Collection Procedures**

An electronic invitation briefly outlining the purpose of the study was sent to a potential list of candidates compiled using the aforementioned sources. HR professionals were invited to complete a short online survey lasting between five and ten minutes. A consent form was presented to the user on the landing page of the survey. If consent was obtained, users were presented with the question “Does the organization you represent for the purpose of this survey offer paid or unpaid sabbaticals to some or all of its employees as defined by ‘a period of two or more weeks of time off excluding government mandated laws (e.g., Family Medical Leave Act) or standard vacation policies put forth by the organization’?” Participants who answered “yes” proceeded to the full survey whereas participants who answered “no” were redirected to an alternative pathway. Participants who expressed having a sabbatical program in the past, but no longer, were queried for their prior perceptions of benefits, or lack thereof, to the organization whereas participants indicating there is not, or never has been, a sabbatical program in place were asked about the perceived benefits of sabbaticals programs in general before being presented with demographic questions and completing the survey. All respondents were also

asked a question regarding their own history of taking a sabbatical to evaluate for any individual bias in the qualitative data.

Participation in the study was voluntary and users could exit the survey at any time. Participants were assured that all individual responses were anonymous and would be kept confidential. Survey data was collected and managed using Qualtrics, a securely hosted software platform for administering electronic surveys. The survey remained active for a three-week period between March 11 and April 2, 2021. Qualtrics is designed to anonymously track user activity by determining who has received the email, opened the email, and/or clicked on any links within the email. As a result, survey administrators are able to send out reminders to inactive email recipients to a list generated and managed by Qualtrics. Inactive email recipients were sent reminders after weeks one and two through Qualtrics to participate in the survey.

### **Data Analysis**

Data collected from the survey was exported from Qualtrics into Microsoft Excel where data was examined for missing data, outliers, and impossible values prior to analysis. Data cleansing led to the removal of 29 invalid or incomplete survey submissions resulting in a data set consisting of 95 participants. The response rate of 1% was disappointing given the effort behind recruitment. Table 1 summarizes participant data and inclusion judgement for final data analysis.

**Table 1**

*Participant Data*

Participant Category	Frequency	Percent	Included in Final Data Analysis
Completed Consent Process	124	100%	–
Beta Testers	6	4.8%	No

Participant Category	Frequency	Percent	Included in Final Data Analysis
Incomplete Surveys	23	18.5%	No
Active Sabbatical Program	33	26.6%	Yes
Prior Sabbatical Program	1	0.8%	No
No Sabbatical Program	61	49.2%	No

Although data was collected from three potential groups: active sabbatical program; prior sabbatical program; and no sabbatical program to ensure enough data was collected for analysis, only those with an active sabbatical program ( $N = 33$ ) were of primary interest and therefore used exclusively for all remaining analysis. Quantitative data was analyzed using IBM SPSS 27. A manual/long-hand thematic analysis was completed and used to identify and report reoccurring themes for open-ended responses relating to ROI. Results of the survey report data in aggregate.

## Chapter IV: Results

Results of the current study offer evidence that non-academic workplace sabbaticals are perceived by HR professionals in organizations currently offering sabbaticals to have a number of organizational benefits.

### Demographics

The final data set was comprised of a wide array of industry types ranging from education and training (30%)<sup>1</sup>, hospitality and tourism (9%), insurance (9%), manufacturing (6%), legal (6%), construction (6%), and numerous others making up the remaining (34%). The majority of survey respondents were from organizations that have been in business for 21 or more years (79%) while others reported being employed by establishments in business for 1 to 5 years (3%), 6 to 10 years (15%), and 16 to 20 years (3%). None of the respondents indicated being employed by establishments in business for 11 to 15 years. Company size also varied with extra-large companies (10,000+ employees) representing 42% of the dataset, large companies (1,001–10,000 employees) 39%, medium companies (251–1000 employees) 12%, and small companies (1–250 employees) accounting for the remaining 6%.

### Hypothesis Testing

Hypothesis testing was split into three parts: part one (hypotheses 1–9) investigated whether specific and overall benefits are perceived as beneficial to the organization as it relates to their current sabbatical program; part two (hypotheses 10–14) assessed whether those perceptions change under varying circumstances; and part three reports on whether ROI is being objectively measured and if so, how?

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<sup>1</sup> Although the master database was screened for .edu email addresses these respondents may reflect non-academic institutions (e.g., Huntington Learning Center) and therefore were included in the analysis.

**Part I: Hypotheses 1-9**

Nine one-sample directional t-tests were completed to determine if on average HR professionals working for companies with active sabbatical programs positively endorse benefits of having a sabbatical program in place on recruitment (H1); retention (H2); productivity (H3), succession planning (H4); professional development (H5); fulfill CSR goals (H6); economic relief/budget planning (H7); employee recognition/reward mechanism (H8) as well as the overall benefit (H9). The sample was compared against a mean value of 3, which indicates no endorsement of perceived benefit whereas a response of 1 indicated strong disagreement and 5 indicated strong agreement. Results below are presented in order of the previously defined hypotheses.

**Recruitment.** HR professionals working for organizations who currently have a sabbatical program in place ( $M = 3.73$ ,  $SD = 1.15$ ) do perceive recruitment as a significant benefit of sabbaticals to the granting organization,  $t(32) = 3.62$ ,  $p < .001$ . Thus, support for recruitment (H1) was obtained in this study.

**Retention.** HR professionals working for organizations who currently have a sabbatical program in place ( $M = 4.06$ ,  $SD = 1.12$ ) do perceive retention as a significant benefit of sabbaticals to the granting organization,  $t(32) = 5.46$ ,  $p < .001$ . Thus, support for retention (H2) was obtained in this study.

**Productivity.** HR professionals working for organizations who currently have a sabbatical program in place ( $M = 3.39$ ,  $SD = 1.12$ ) do perceive productivity as a significant benefit of sabbaticals to the granting organization,  $t(31) = 3.47$ ,  $p = .001$ . Thus, support for productivity (H3) was obtained in this study.

**Succession Planning/Leadership Development.** HR professionals working for organizations who currently have a sabbatical program in place ( $M = 3.30$ ,  $SD = 1.08$ ) do not perceive succession planning/leadership development as a significant benefit to the granting organization,  $t(32) = 1.62$ ,  $p = .058$ . Consequently, support for succession planning/leadership development (H4) was not found.

**Professional Development.** HR professionals working for organizations who currently have a sabbatical program in place ( $M = 3.42$ ,  $SD = 1.20$ ) do perceive professional development as a significant benefit of sabbaticals to the granting organization,  $t(32) = 2.03$ ,  $p = .026$ . Thus, support for professional development (H5) was obtained in this study.

**CSR Fulfillment.** HR professionals working for organizations who currently have a sabbatical program in place ( $M = 3.39$ ,  $SD = 1.03$ ) do perceive fulfilling CSR goals as a significant benefit of sabbaticals to the granting organization,  $t(32) = 2.20$ ,  $p = .018$ . Thus, support for CSR fulfillment (H6) was obtained in this study.

**Economic Relief/Budget Planning.** HR professionals working for organizations who currently have a sabbatical program in place ( $M = 2.85$ ,  $SD = 1.12$ ) do not perceive economic relief/budget planning as a significant benefit of sabbaticals to the granting organization,  $t(32) = 0.78$ ,  $p = .222$ . Consequently, support for economic relief/budget planning (H7) was not observed here.

**Employee Recognition/Reward Mechanism.** HR professionals working for organizations who currently have a sabbatical program in place ( $M = 3.58$ ,  $SD = 1.20$ ) do perceive employee recognition/reward mechanism as a significant benefit of sabbaticals to the granting organization,  $t(32) = 2.76$ ,  $p = .005$ . Thus, support for employee recognition/reward mechanism (H8) was obtained in this study.

**Overall Benefit.** HR professionals working for organizations who currently have a sabbatical program in place ( $M = 4.06$ ,  $SD = 1.09$ ) do perceive sabbaticals overall as a significant benefit of to the granting organization,  $t(32) = 5.60$ ,  $p < .001$ . Thus, support for the overall benefit of sabbaticals in non-academic workplaces (H9) was obtained in this study.

***Part II: Hypotheses 10-14***

A between-subjects ANOVA was completed for each question with categorical nominal responses to determine if on average the following variables make a difference in HR professional's overall perception of their existing sabbatical program: length of time the organization has offered a sabbatical program (H10); employer- vs. employee-directed (H11); sabbatical awardees receiving full, partial, or no compensation while away (H12); sabbatical benefit limited to specific groups of employees (H13); and survey participants themselves having had the opportunity to take a sabbatical (H14). Although a Bonferroni correction method (.05/6) was used to control for type I errors, the following results should be considered tentative, as low sample sizes decreased the reliability of data estimates.

**Length of Time Employer Has Offered Sabbatical Program.** No significant differences in perception to the overall benefit of sabbaticals were reported between those companies with a sabbatical program in place for 0–19 years ( $N = 15$ ,  $M = 3.87$ ,  $SD = 1.41$ ), 20–39 years ( $N = 7$ ,  $M = 4.29$ ,  $SD = 0.95$ ), 40–59 years ( $N = 3$ ,  $M = 4.67$ ,  $SD = 0.58$ ), or 80–100 years ( $N = 3$ ,  $M = 4.00$ ,  $SD = .000$ ) – including respondents who did not know now how long the current sabbatical program was in place ( $N = 5$ ,  $M = 4.00$ ,  $SD = 0.71$ );  $F(4,28) = 0.401$ ,  $p = .807$ . Support for H10 was not found.

**Employer- vs. Employee-Directed Sabbaticals.** No significant differences in perception to the overall benefit of sabbaticals were reported between those companies with an employer-

directed sabbatical program ( $N = 1, M = 5.00, SD = 0.00$ ), employee-directed sabbatical program ( $N = 23, M = 3.91, SD = 1.20$ ), or a combination of the two ( $N = 8, M = 4.38, SD = .074$ ) – including respondents who did not know now if their sabbatical program was employer- or employee directed ( $N = 1, M = 4.00, SD = 0.00$ );  $F(3,29) = 0.590, p = .627$ . Support for H11 was not observed. A post hoc question of interest was comparing just the two separate groups: employee vs employer directed and excluding the “combination of both” category. Unfortunately, only one respondent indicated employer-directed sabbaticals and therefore, it was not possible to analyze those two groups alone.

**Compensation Model.** No significant differences in perception to the overall benefit of sabbaticals were reported between those companies offering fully paid sabbaticals ( $N = 12, M = 4.75, SD = 0.45$ ), partially paid sabbaticals ( $N = 4, M = 4.00, SD = 1.41$ ), unpaid sabbaticals ( $N = 7, M = 3.57, SD = 0.98$ ), or an amalgamation of the three ( $N = 9, M = 3.78, SD = 1.20$ );  $F(3,28) = 2.919, p = .051$ . Support for H12 was not obtained. A similar post hoc question of interest was comparing just the three separate groups: fully paid, partially paid, and unpaid sabbaticals while excluding the “amalgamation of the three” category. Interestingly, a significant differences in perception to the overall benefit of sabbaticals was reported between those companies offering fully paid sabbaticals ( $N = 12, M = 4.75, SD = .452$ ), partially paid sabbaticals ( $N = 4, M = 4.00, SD = 1.41$ ), or unpaid sabbaticals ( $N = 7, M = 3.57, SD = 0.98$ );  $F(2,20) = 4.634, p = .022$ . A Bonferroni post hoc test was used to determine significant differences among the three compensation groups. The fully paid group and unpaid group significantly differed in their perceptions whereas there was no significant difference between fully paid and partially paid groups or partially paid and unpaid groups. Support for H12 was obtained taking this approach.

**Executive vs. Non-Executive Employees.** No significant differences in perception to the overall benefit of sabbaticals were reported regardless of whether the sabbatical program was open to executive level employees only ( $N = 3, M = 4.00, SD = 0.00$ ), non-executive employees only ( $N = 2, M = 4.00, SD = 0.00$ ), or both executive and non-executive employees ( $N = 15, M = 3.93, SD = 1.22$ );  $F(3,29) = .166, p = .919$ . Support for H13 was not found.

**Personal Sabbatical Opportunity.** No significant differences in perception to the overall benefit of sabbaticals were reported between those who have taken a sabbatical ( $N = 8, M = 4.50, SD = 0.76$ ) and those who have not taken a sabbatical ( $N = 25, M = 3.92, SD = 1.15$ );  $F(1,31) = 1.763, p = .194$ . H14 was not supported.

### ***Part III: Return on Investment (ROI) Data***

Of those surveyed and who reported having a sabbatical program ( $N = 33$ ), ROI objective measurement is currently being measured by only a small number (15%). For those who reported doing so ( $N = 5$ ), four out of the five left qualitative feedback. Two reoccurring themes emerged: employee feedback via surveys (40%) and retention rates pre- and post-implementation of sabbatical program (40%). For those not measuring ROI ( $N = 24$ ), seventeen participants left feedback with the most frequently cited reason being that the program was rarely taken advantage of (28%), followed by insufficient metrics and/or data (24%), and lack of interest (20%). The remainder of the participants ( $N = 4$ ) skipped the question. Rather than reporting percentages based on the denominator that reflects only those who commented ( $N = 29$ ), the full sample ( $N = 33$ ) was used. This decision was made as it reflects the percentage of total possible respondents and eliminates the need to speculate on why four participants neglected to answer the question, thus maintaining the integrity of the data.

## **Chapter V: Discussion, Conclusion and Recommendations**

Non-academic workplace sabbaticals have garnered minimal mainstream attention since the 1970s and 80s when companies like McDonalds Corporation, Intel, and Time Warner implemented them (Kramer, 2001; Otto & Kroth, 2011; Stevenson, 1995). Even now, as corporate sabbaticals have gained some traction across industry, commonly published works touting sabbaticals emphasize benefits to the individual as opposed to the granting organization, providing little literary support for those advocating to implement a sabbatical program in the workplace in order to benefit the organization. Nor has much attention been given to the ROI which makes it difficult for supporters to make sound financial decisions or gain deeper insight into measuring the success or failure of sabbatical programs as it relates to the organization. Therefore, the current study solicited feedback from HR professionals employed by non-academic organizations offering sabbatical programs to gain a deeper understanding of perceived benefits to the granting organization as well as whether or not ROI is being measured objectively.

Not surprisingly, results of this study indicate that only 15% of companies who report having a sabbatical program at this time are objectively measuring the success or failure of their current sabbatical program. On a more promising note, however, HR representatives of organizations currently offering non-academic workplace sabbaticals perceive recruitment, retention, productivity, professional development, CSR objectives, and employee recognition as sabbatical benefits.

### **Perceived Benefits to the Organization**

Perceived benefits to the organization were measured using two sets of hypotheses: the first set, hypotheses 1–9 investigated whether specific benefits (e.g., recruitment, retention) and

overall benefit are perceived as beneficial to the organization as it relates to their current sabbatical program and second, hypotheses 10–14 assessed whether those perceptions change under varying circumstances (e.g., compensation model, employer- vs. employee-directed).

Overall, non-academic workplace sabbaticals are perceived by HR professionals as having a number of added benefits to the granting organization regardless of length of time the sabbatical program has been implemented, employer- vs. employee directed, which employee groups qualify, or whether the respondents of this survey have taken a sabbatical themselves. Compensation model on the other hand, did have a significant impact on how benefits were perceived. Not surprisingly, HR professionals employed by organizations who offered paid sabbaticals rated perceived benefits higher on average than those employed by organizations offering unpaid sabbaticals. But again, when discussing the aforesaid variables, the small number of subjects make it difficult to establish how reliable the results are. A larger sample size would be desirable to report findings with more confidence.

HR professionals in this study perceive sabbaticals as a valuable tool in recruitment and consequently a benefit to the organization as a whole. This corresponds with both empirical and anecdotal evidence previously reported (Carr & Tang, 2005; Onken-Menke et al., 2018; Pagano & Pagano, 2009; Tyler, 2011). Recruitment efforts often involve a significant amount of human resources efforts within an organization. Highly qualified newer employees entering the workforce and experienced employees with impressive resumes and existing expertise are highly sought-after assets. As Onken-Menke et al. point out, in order to entice these individuals and remain competitive, organizations strive to have appealing benefits packages available in addition to attractive job descriptions and working environments (2018). Indeed, sabbatical offerings as part of an employment agreement may give one organization the edge over another

in a competitive job market. That is, if all other offerings are relatively equal, those companies with a sabbatical program may persuade a potential employee toward that company. Even when other benefits are not considered equal, it is possible that the idea of a sabbatical would win out over other leave benefits. The millennial generation, who now make up the bulk of the workforce, have been found to have different occupational values than previous groups, with an emphasis on work-life balance (White et al., 2019). As extended travel, family leaves, and other time-intensive expenditures that require an extended absence from the workplace become more desired and more commonplace, it is possible that the current HR professionals are correct in assuming sabbatical offerings enhance recruitment efforts.

HR professionals queried also perceive employee retention as an added benefit of having a sabbatical program. Finding and securing qualified, committed employees is only the first step in developing a productive roster within an organization. While extensive effort can go into recruiting, retention efforts can also require a substantial amount of time and money. Case in point, a total of \$82.5 billion dollars was spent on corporate training in the United States according to the annual 2020 Training Industry Report (Training Magazine, 2020). Organizations often put forth valuable resources in onboarding and training efforts, and the return on those investments can be diminished if employee turnover is high and repeated training for new employees is necessary. Regardless, similar to a pension program, it seems intuitive that sabbatical programs offered after a sustained number of years of employment may improve retention as employees stay on for the added benefit of the sabbatical. Intel Corporation and several non-profit organizations echo this sentiment and recognized early on that sabbaticals would have the added benefit of minimizing turnover while boosting morale (Axel, 1992; Tyler, 2011).

HR professionals from this study believe that sabbaticals lead to an increase in productivity. Previous literature focused on benefits stemming from sabbatical programs, both to the individual as well as the organization, have also suggested that employees return from a sabbatical feeling refreshed with a renewed sense of passion and motivation, leading to an increase in productivity and renewed loyalty to the granting organization (Bolch, 2006; Bradford, 2001; Burkus, 2016; Carr & Tang, 2005; Gordon, 2002). Although often cited subjectively, empirical research investigating productivity gains and losses as it relates to sabbatical programs was difficult to find. Perhaps because productivity and burnout are closely related constructs (Maslach & Leiter, 2016), investigating the benefits of avoiding burnout would offer richer insights into productivity as a whole.

HR professionals surveyed for this study did not perceive sabbaticals as a means of economic relief to the organization. While gains in employee productivity and maximizing efficiency has long been an important part of business, efforts to increase efficiency and minimize expenses can be especially important during periods of economic stress, a conviction hyped as early as the 1940s and still supported today (Innes, 2020; Persoff, 1945). Perhaps other programs are viewed more favorably. Early retirement packages are historically one method corporations have used to reduce the workforce when necessary. In this situation, however, the workforce is more permanently reduced. A voluntary, unpaid sabbatical program could be used to minimize employee cost during such times without having to resort to employee lay-offs or longer-term workforce reductions. Voluntary work reduction strategies that could be utilized include offering extended, unpaid leaves around accrued maternity and paternity leaves — a time when many individuals willingly accept unpaid time away in exchange for more time at home with newborns. Extended holiday time is another strategy that could be employed during these

periods. Possibly those in the HR profession prefer to frame temporary unemployment in more humane terms to counteract any negative thoughts associated with other strategies but in reality, all are still an expense to the organization that is not present if employees are simply furloughed.

Professional development was also perceived by the HR professionals of this study as an organizational benefit of sabbatical programs. The data obtained was not granular enough to ascertain if sabbaticals taken for personal reasons versus those taken solely for career progression would change this perception. And, although closely related, succession planning/leadership development was not perceived as beneficial to the granting organization even though several published sources stated otherwise (Burkus, 2017; Ip & Jacobs, 2006; Linnell & Wolfred, 2009; Pagano & Pagano, 2009; Seymour, 2008). Feasibly, succession planning and leadership development is more closely scrutinized by the direct managers and supervisors of those remaining in the workplace while a current leader is on sabbatical rather than the HR professionals who may be too far removed to observe this potential benefit directly. Alternatively, it is also possible that HR professionals favor more structured and/or reputable leadership development programs.

HR professionals also endorsed sabbaticals as a means to satisfy CSR goals. Corporate social responsibility is becoming a more prevalent topic as employees and consumers demand increased social awareness and accountability toward equality, social justice, sustainability, and environmental protection. Philanthropic sabbaticals, like those implemented by Xerox and SAP, designed to serve the greater good may appeal to altruistic employees looking for the opportunity to provide humanitarian work (SAP, n.d.; Xerox, 2011). In turn, the corporation may benefit by having higher overall employee satisfaction (leading to increased retention and production) as

well as being able to capitalize on the work in marketing and promotional materials as suggested by Hassell (2019).

### **ROI Objective Measurement**

The majority of feedback regarding organizational benefits of sabbaticals has been primarily anecdotal, with empirical evidence being nearly obsolete as it pertains to ROI. Several authors have discussed both the challenge and need for completing a cost-benefit analysis of sabbatical programs (Gordon, 2002; Kramer, 2001; Leung et al., in press; Pagano & Pagano, 2009) making it easy to understand why only 15% of respondents indicating doing so in the current study. With so many possible configurations to factor in (e.g., compensation model, personnel replacement costs, benefit maintenance), it would be difficult, if not impossible, to determine ROI without a set of predetermined metrics combined with benefit specific costs. A recent report published by the Wisconsin SHRM State Council (2021), discusses the ongoing battle of establishing the ROI of employee benefit programs. The author openly acknowledges that the benefits of such programs may be more apparent to HR representatives due to their close proximity to the beneficiaries but less obvious to other administrators, who may prefer more concrete evidence. To satisfy this need, the author goes on to make the following suggestions: defining multiple data collection points specific to the program to be evaluated (i.e., salary, ongoing benefits, length of time rewarded), measure employee reactions using pre-determined acceptability ratings to benchmark conversion rates, measure employee change (i.e., attitude, performance reviews), and taking time to reflect on overall impact on areas like turnover rates and employee morale (Cull, 2021).

Although the present study did little in the way of illuminating ways to objectively measure the ROI for organizations interested in doing so, it does move the conversation forward

by identifying why companies are not currently taking part in this evaluation (e.g., lack of metrics and/or interest). However, one might argue that if the necessary systems/metrics were in place to measure ROI, more companies might be willing to consider adopting a sabbatical plan of their own, especially if it is empirically found to lead to improved recruitment, retention, productivity, and other areas related to human capital this study investigated.

## **Limitations and Future Directions**

### ***Limitations***

There are several limitations to the current study. First, despite a rather extensive list of HR professionals contacted, the low response rate limited the power of the study overall. A power analysis based on the  $F$  test family and one-way ANOVA was conducted using the statistical software G\*Power (Faul et al., 1992–2021) and the results indicated the present study has limited statistical power given the small sample size ( $N = 33$ ) despite best efforts to recruit a large sample. In addition to lacking the necessary power, a small sample weakens reliability. In order to obtain the desired statistical power at the recommended .80 level, an  $n$  of approximately 80 would have been needed. A general benefit to survey research is the ability to gather data from a large cohort, but this did not prove to be the case for this project. Several reminders were sent, but response rates remained low. Efforts to increase response rates in the future would be helpful. Research conducted by well-known, recognized, and respected organizational agencies (i.e., SHRM) may improve response rates.

Second, survey research carries an inherent self-selection bias — that is, it is possible that those who chose to respond are different from those who did not and makes generalizing the results to all organizations difficult. Attempts were made to send the survey to a representative sample of HR professionals by excluding only those in academia, but the success of this

generalization was largely unknown and the limited response rate further interfered with this effort. Limiting the survey to HR professionals also carries a bias. While this was intentional given the need to focus the research and understanding that HR professionals are likely to have significant involvement in sabbatical programs within their company, other leaders within the organization such as executive leadership, financial leaders, marketing professionals and recruiting professionals would also likely have valuable insight into the impact of sabbatical programs on the organization. Future efforts at understanding non-academic workplace place sabbatical benefits would need to include these members of the organization.

Third, while a focus on generalized non-academic organizations was the goal in this study, it is possible that sabbatical programs would benefit specific organizations or types of businesses more so than others. It is equally possible that only specific types of sabbatical programs would benefit an organization or that a sabbatical program would benefit the organization in some ways but hinder organizational success in others. The vast number of different organizations and the many forms of sabbatical offer a multitude of combinations that could have varying impact on the question of organizational benefit of sabbaticals. The wide-sweeping and general nature of the questions posed in this study offer just a first glimpse into these answers. Further research into the organizational benefits of sabbatical programs would need to begin to focus on specific business types and specific sabbatical models in an effort to delineate those that may be most beneficial. Once more specific groups are identified, a complex evaluation of the cost and return on investment would be required to quantify the benefit and sustainability to the organization.

### *Future Directions*

As it relates specifically to the recruitment benefit of non-academic workplace sabbaticals, more focused and objective data from those individuals' seeking employment is required to further understand the impact a sabbatical offering has on the decision to accept an employment offer. Specific sabbatical models (time allowed, type of sabbatical, and compensation models) may be more influential than others in terms of recruitment. Therefore, it would benefit the organization to have objective data illustrating these differences when making decisions about the recruitment benefits of a sabbatical program.

Retention was also perceived as a benefit to the granting organization and if this were objectively found to be true, the financial impact to the organization offering sabbaticals would have to be weighed against the cost of onboarding and repeated training for new employees to ascertain the monetary benefit to the organization. This analysis would necessarily have to include paid, partially paid, and unpaid sabbaticals as the retention benefits and the costs to the organization could differ dramatically. Similarly, if sabbatical offerings can be shown to improve the overall productivity level of an employee, by improving overall happiness and satisfaction as well as returning employees to the workplace after a period of rest and rejuvenation, organizations may more seriously consider the institution and maintenance of such programs. Industries such as medicine, social work, and ministry have investigated sabbaticals as a means to reduce burnout (Hassell, 2019; Koo, 2017). While burnout was not directly addressed in this study from an organizational standpoint, it is plausible to see how burnout, retention, and productivity are closely related in the workplace. Those professions that report a high level of burnout may be especially interested in research related to how sabbaticals may improve retention and productivity. As technology improves and advances the capacity to track individual

progress, organizations may consider using wearable devices (e.g., smart watches, clip-on performance monitors) to monitor performance before and after granting a sabbatical as one innovative approach to measuring productivity gains or losses (Mercer, 2020).

Corporate social responsibility and ROI metrics are much more challenging to define and several experts would likely need to be involved in developing a standard practice for objectively measuring both CSR and ROI. Marketing executives and consumer analysts would be important groups to include for substantiating the perception that CSR was indeed a significant benefit to the granting organization. ROI metrics would necessarily involve a complex analysis within the organization, evaluating both specific types of sabbaticals and the actual measured benefit to the organization. Recruitment and retention rates may be the most straight-forward variables to study, leaving areas like productivity, leadership development and corporate social responsibility more difficult to quantify.

The goal of this research was to understand on a broad level whether HR professionals viewed their current sabbatical program as beneficial to the organization. HR professionals responding to this study overall view sabbatical programs as beneficial to their organization, regardless of industry, company size, years in business, sabbatical compensation model, or whether or not they themselves have had the privilege to take a sabbatical. Only a small minority, however, were able to report objectively measuring the success or failure of the company's current sabbatical program and for those who were, most did so in the form of employee surveys and retention rates pre- and post-sabbatical leaves. There was minimal, if any, response data regarding objective measurement of recruitment, productivity, professional development or CSR. Objective data in these areas would be a first step not only for HR professionals, but for everyone in executive and leadership positions within the company. If

objective data supported these benefits to the organization, further research would need to be done at the organizational level, investigating the cost to the organization relative to the actual benefit, as it is important to note that programs may be beneficial to an organization but not cost effective.

Interestingly, the reasons cited for the lack of objective data were centered around lack of utilization of the sabbatical program, lack of interest in analyzing the program, and lack of available metrics. Perhaps social pressure, internal politics, and/or compensation impacts an employee's ability to take advantage of the company sabbatical program. More research targeting this area specially would be needed to improve utilization rates. With regard to a lack of interest in analyzing the potential benefits or ROI of a program, employers may find it resource intensive and therefore more costly in the end, particularly if the organization only offers unpaid sabbaticals. For those interested in a deeper understanding, it may be beneficial to design a new study using a mixed-methodology approach that takes advantage of one-on-one follow-up interviews to collect richer feedback around these issues.

Regardless, business strategies that potentially improve recruitment, retention and/or productivity should be of prime interest to corporate executives, strategists and analysts, as well as any consultants brought in to improve efficiency and overall company performance. If sabbatical programs were demonstrably found to improve these areas of business and could be carried out in a cost-effective manner, they would warrant significant consideration for implementation.

## **Conclusion**

Support for non-academic workplace sabbaticals has made small strides in corporate America since their adoption in the 1970s and 80s. As such, companies and private organizations

contemplating a sabbatical program of their own are sure to find a lack of impartial literature that is often needed to gain the necessary support to sell management on the idea. Ongoing research is necessary to expand on the modest repository of information currently available. As the results indicated, only 15% surveyed claimed to measure the success or failure of their programs objectively. Those who reported not measuring lacked the desire, resources, and/or tools to do so. Perhaps clearly defined metrics for measuring ROI is a vital step in getting more organizations to see sabbaticals as a real benefit. That, coupled with data supporting the added benefit of those identified by HR professionals in this study: improved recruitment, retention, productivity, CSR goal fulfillment, and employee recognition efforts, might be just enough to influence decision makers on the idea that sabbaticals are no longer suited for academia alone.

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## Appendix A

### Electronic Invitation

Subject: Graduate Student Research on Workplace Sabbaticals: Invitation to Participate

Hello,

You have been identified as a potential candidate to participate in a survey designed to understand the perceived benefits of paid and unpaid sabbaticals in the workplace. What makes this survey unique is that it focuses on benefits to the organization versus the individual—the latter being far more common to study. For the purpose of this study, the term “sabbatical” will be defined as an extended period (two weeks or more) of paid or unpaid time off excluding government mandated time off policies (i.e., Family and Medical Leave, etc.) or standard vacation.

The survey is anonymous, as it collects no information that could identify you, and should last no more than 5 to 10 minutes. It will remain open until 11:59PM on April 2, 2021. We know you are busy so your time and consideration is greatly appreciated.

For more information about the study, or access to consent form, visit:  
<https://www.linktothesurvey.com>

The research being conducted has been approved by the Institutional Review Board (IRB) of the University of Wisconsin-Stout. The survey being conducted is part of a student requirement for PSYC-770: Thesis-Applied Psychology in the M.S. in Applied Psychology program.

Kind regards,  
Kate Dinsmore

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## **Appendix B**

### **Consent Form**

Consent to Participate In UW-Stout Research

**Project Title.** Non-Academic Workplace Sabbaticals: Perceived Benefits to the Organization Survey

**Description.** The main purpose of this research is to study the views of senior level Human Resource (HR) representatives on sabbatical programs. If you choose to participate, you will be asked to complete a 5-10 minute survey that asks a maximum of 25 multiple choice and short answer questions. Survey is completely anonymous; you will not be asked any questions that could identify you or your organization.

**Risks.** The risks associated with this study are considered minimal and should not exceed risks experienced in the course of daily life.

- There is no penalty to you if you answer a certain way or if you decide not to answer any question or to not participate at all.
- As a participant, you may feel that there is a risk for breach of confidentiality. This risk is minimized as all your answers are anonymous; no information that can identify you will be collected nor will your employer know you participated or any responses you provide.

**Benefits.** Industrial and Organization (I/O) research often looks at how sabbaticals benefit the individual not the organization. This research seeks to understand how it benefits the organization. Gathering research data on how it benefits an organization may help future HR professionals looking into sabbatical programs for their employees.

**Confidentiality.** No personal identification will be collected in the survey so your response will be anonymous. Further, raw data will only be collected and reviewed by the student researcher and her advisor. Data will be collected and stored on secure, password protected servers hosted by UW-Stout. Survey results will be reported predominantly through average scores. Short answer responses may be reported verbatim, but with any identifying information that was provided by the respondent removed.

**Future Use.** There is no planned future use of the data collected beyond public reporting of results.

**Time Commitment.** Completion of the survey should take approximately 5-10 minutes.

**Right to Withdraw.** Your participation in this study is entirely voluntary. You may choose not to participate without any adverse consequences to you. You have the right to stop the survey at any time. However, should you choose to participate and later wish to withdraw from the study, there is no way to identify your anonymous document after it is submitted to the investigator. If you are participating in an anonymous online survey, once you submit your response, the data cannot be linked to you and cannot be withdrawn.

**IRB Approval.** This study has been reviewed and approved by the University of Wisconsin-Stout's Institutional Review Board (IRB). The IRB has determined that this study meets the ethical obligations required by federal law and University policies. If you have questions or concerns regarding this study, please contact the Investigator or Advisor. If you any questions, concerns, or reports regarding your rights as a research subject, please contact the IRB Administrator.

**Statement of Consent.** I have read the above information and I understand that by continuing to fill out this survey, I am implying my consent for the data to be used by Katherine Dinsmore, student and primary investigator.

If you have any questions, please reach out to a member of the research team by email:

**Investigator:**

Katherine Dinsmore  
dinsmorek0239@my.uwstout.edu

**Advisor:**

Dr. Kristina Gorbatenko-Roth  
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**Appendix C**  
**Survey Instrument**

**Perceptions of Non-Academic Workplace Sabbaticals by HR Professionals**

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Start of Block: Consent Block

See Appendix B

End of Block: Consent Block

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## Start of Block: Full Survey

Q1 Does the organization you represent for the purpose of this survey currently offer paid or unpaid sabbaticals to some or all of its employees as defined by ‘a period of two or more weeks of time off excluding government mandated laws (e.g., Family Medical Leave Act) or standard vacation policies put forth by the organization’?

- a. Yes
- b. No

*Skip To: End of Block If Q1 = No*

Q2.A Approximately how long has your organization offered a sabbatical program?

<input type="checkbox"/>	–	<input type="checkbox"/>	20 Years	<input type="checkbox"/>	40 Years	<input type="checkbox"/>	60 Years	<input type="checkbox"/>	80 Years
<input type="checkbox"/>	Less than 1 Year	<input type="checkbox"/>	20 Years	<input type="checkbox"/>	40 Years	<input type="checkbox"/>	60 Years	<input type="checkbox"/>	80 Years
<input type="checkbox"/>	1 Year	<input type="checkbox"/>	21 Years	<input type="checkbox"/>	41 Years	<input type="checkbox"/>	61 Years	<input type="checkbox"/>	81 Years
<input type="checkbox"/>	2 Years	<input type="checkbox"/>	22 Years	<input type="checkbox"/>	42 Years	<input type="checkbox"/>	62 Years	<input type="checkbox"/>	82 Years
<input type="checkbox"/>	3 Years	<input type="checkbox"/>	23 Years	<input type="checkbox"/>	43 Years	<input type="checkbox"/>	63 Years	<input type="checkbox"/>	83 Years
<input type="checkbox"/>	4 Years	<input type="checkbox"/>	24 Years	<input type="checkbox"/>	44 Years	<input type="checkbox"/>	64 Years	<input type="checkbox"/>	84 Years
<input type="checkbox"/>	5 Years	<input type="checkbox"/>	25 Years	<input type="checkbox"/>	45 Years	<input type="checkbox"/>	65 Years	<input type="checkbox"/>	85 Years
<input type="checkbox"/>	6 Years	<input type="checkbox"/>	26 Years	<input type="checkbox"/>	46 Years	<input type="checkbox"/>	66 Years	<input type="checkbox"/>	86 Years
<input type="checkbox"/>	7 Years	<input type="checkbox"/>	27 Years	<input type="checkbox"/>	47 Years	<input type="checkbox"/>	67 Years	<input type="checkbox"/>	87 Years
<input type="checkbox"/>	8 Years	<input type="checkbox"/>	28 Years	<input type="checkbox"/>	48 Years	<input type="checkbox"/>	68 Years	<input type="checkbox"/>	88 Years
<input type="checkbox"/>	9 Years	<input type="checkbox"/>	29 Years	<input type="checkbox"/>	49 Years	<input type="checkbox"/>	69 Years	<input type="checkbox"/>	89 Years
<input type="checkbox"/>	10 Years	<input type="checkbox"/>	30 Years	<input type="checkbox"/>	50 Years	<input type="checkbox"/>	70 Years	<input type="checkbox"/>	90 Years
<input type="checkbox"/>	11 Years	<input type="checkbox"/>	31 Years	<input type="checkbox"/>	51 Years	<input type="checkbox"/>	71 Years	<input type="checkbox"/>	91 Years
<input type="checkbox"/>	12 Years	<input type="checkbox"/>	32 Years	<input type="checkbox"/>	52 Years	<input type="checkbox"/>	72 Years	<input type="checkbox"/>	92 Years
<input type="checkbox"/>	13 Years	<input type="checkbox"/>	33 Years	<input type="checkbox"/>	53 Years	<input type="checkbox"/>	73 Years	<input type="checkbox"/>	93 Years
<input type="checkbox"/>	14 Years	<input type="checkbox"/>	34 Years	<input type="checkbox"/>	54 Years	<input type="checkbox"/>	74 Years	<input type="checkbox"/>	94 Years
<input type="checkbox"/>	15 Years	<input type="checkbox"/>	35 Years	<input type="checkbox"/>	55 Years	<input type="checkbox"/>	75 Years	<input type="checkbox"/>	95 Years
<input type="checkbox"/>	16 Years	<input type="checkbox"/>	36 Years	<input type="checkbox"/>	56 Years	<input type="checkbox"/>	76 Years	<input type="checkbox"/>	96 Years
<input type="checkbox"/>	17 Years	<input type="checkbox"/>	37 Years	<input type="checkbox"/>	57 Years	<input type="checkbox"/>	77 Years	<input type="checkbox"/>	97 Years
<input type="checkbox"/>	18 Years	<input type="checkbox"/>	38 Years	<input type="checkbox"/>	58 Years	<input type="checkbox"/>	78 Years	<input type="checkbox"/>	98 Years
<input type="checkbox"/>	19 Years	<input type="checkbox"/>	39 Years	<input type="checkbox"/>	59 Years	<input type="checkbox"/>	79 Years	<input type="checkbox"/>	99 Years

Q3.A How long must an employee be with the organization to qualify for a sabbatical?

<input type="checkbox"/>	–	<input type="checkbox"/>	9 Months	<input type="checkbox"/>	4 Years	<input type="checkbox"/>	8 Years
<input type="checkbox"/>	Effective Immediately	<input type="checkbox"/>	1 Year	<input type="checkbox"/>	5 Years	<input type="checkbox"/>	9 Years
<input type="checkbox"/>	3 Months	<input type="checkbox"/>	2 Years	<input type="checkbox"/>	6 Years	<input type="checkbox"/>	10 Years
<input type="checkbox"/>	6 Months	<input type="checkbox"/>	3 Years	<input type="checkbox"/>	7 Years	<input type="checkbox"/>	More than 10 Years

Q4.A Does your organization offer fully paid, partially paid, or unpaid sabbaticals (please check all that apply)?

- a. Fully Paid
- b. Partially Paid
- c. Unpaid

Q5.A Please indicate which employee groups qualify for the sabbatical program (please check all that apply):

- a. Senior Level Employees (i.e., C-Suite, VPs)
- b. Director Level Employees (i.e., Director of...)
- c. Management Level Employees
- d. Supervisor Level Employees
- e. Entry Level Employees (i.e., Interns, Trainee, Assistant, Specialists, etc.)
- f. Full Time Employees Only
- g. Full and Part Time Employees

Q6.A What type of sabbatical does the organization encourage (please check all that apply)?

- a. Employer Directed (e.g., CSR Programs, Social Service Leave)
- b. Employee Directed (e.g., Rest and Relaxation, Personal Pursuits)

Q7.A In thinking about your current sabbatical program *overall*, please indicate the extent you agree or disagree with the following statement as it pertains to each of the following areas:

I believe the company's current sabbatical program benefits the **organization** in the area of \_\_\_\_\_

	Strongly agree	Somewhat agree	Neither agree or disagree	Somewhat disagree	Strongly disagree
Recruitment	( )	( )	( )	( )	( )
Retention	( )	( )	( )	( )	( )
Productivity	( )	( )	( )	( )	( )
Succession Planning / Leadership Development	( )	( )	( )	( )	( )
Professional Development	( )	( )	( )	( )	( )
Corporate Social Responsibility (CSR) Goals	( )	( )	( )	( )	( )
Economic Relief / Budget Planning	( )	( )	( )	( )	( )

Q8.A Please state any additional objectives/goals of the company's current sabbatical program:

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Q9.A As a Human Resources (HR) professional, please indicate the extent you agree or disagree with the following statements:

I perceive the company's current sabbatical program beneficial to the **organization**.

- a. Strongly agree
- b. Somewhat agree
- c. Neither agree nor disagree
- d. Somewhat disagree
- e. Strongly disagree

Q10.A

I perceive the company's sabbatical program beneficial to the **individual**.

- a. Strongly agree
- b. Somewhat agree
- c. Neither agree nor disagree
- d. Somewhat disagree
- e. Strongly disagree

Q11.A Does the organization objectively measure the return on investment (ROI) of the sabbatical program specifically?

- a. Yes
- b. No

*Skip To: Q11.A.Yes If Q11.A = Yes*

*Skip To: Q11.A.No If Q11.A = No*

Q11.A.No Please explain in your own words why the ROI of the sabbatical program is not being measured objectively:

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Q11.A.Yes Please describe any methods or systems being used to measure the success or failure of your company sabbatical program (e.g., retention rates before and after sabbatical program was implemented, employee feedback):

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End of Block: Full Survey

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Start of Block: Partial Survey

Q2.B Has your organization offered a sabbatical program in the past?

- a. Yes
- b. No

*Skip To: Q3.B If Q2.B = Yes*

*Skip To: Q3.C If Q2.B = No*

Q3.B Please briefly describe why the program was discontinued.

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Q4.B In thinking about your organization's discontinued sabbatical program overall, please indicate the extent you agree or disagree with the following statement as it pertains to each of the following areas:

I believe the discontinued sabbatical program was beneficial to the **organization** in the area of \_\_\_\_\_

	Strongly agree	Somewhat agree	Neither agree or disagree	Somewhat disagree	Strongly disagree
Recruitment	( )	( )	( )	( )	( )
Retention	( )	( )	( )	( )	( )
Productivity	( )	( )	( )	( )	( )
Succession Planning / Leadership Development	( )	( )	( )	( )	( )
Professional Development	( )	( )	( )	( )	( )
Corporate Social Responsibility (CSR) Goals	( )	( )	( )	( )	( )
Economic Relief / Budget Planning	( )	( )	( )	( )	( )

Q5.B Please state any additional objectives/goals in which the discontinued sabbatical program benefited the organization (versus the individual):

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Q6.B As a Human Resources (HR) professional, please indicate the extent you agree or disagree with the following statements:

I believe a non-academic workplace sabbatical program would be beneficial to the **organization**.

- a. Strongly agree
- b. Somewhat agree
- c. Neither agree nor disagree
- d. Somewhat disagree
- e. Strongly disagree

Q7.B I believe a non-academic workplace sabbatical program would be beneficial to the **individual**.

- a. Strongly agree
- b. Somewhat agree
- c. Neither agree nor disagree
- d. Somewhat disagree
- e. Strongly disagree

*Skip To: End of Block If Q7.B = Strongly agree*

*Skip To: End of Block If Q7.B = Somewhat agree*

*Skip To: End of Block If Q7.B = Neither agree nor disagree*

*Skip To: End of Block If Q7.B = Somewhat disagree*

*Skip To: End of Block If Q7.B = Strongly disagree*

Q3.C In thinking about a non-academic workplace sabbatical program overall, please indicate the extent you agree or disagree with the following statement as it pertains to each of the following areas:

I believe a non-academic workplace sabbatical program would be beneficial for the **organization** in the area of \_\_\_\_\_

	Strongly agree	Somewhat agree	Neither agree or disagree	Somewhat disagree	Strongly disagree
Recruitment	( )	( )	( )	( )	( )
Retention	( )	( )	( )	( )	( )
Productivity	( )	( )	( )	( )	( )
Succession Planning / Leadership Development	( )	( )	( )	( )	( )
Professional Development	( )	( )	( )	( )	( )
Corporate Social Responsibility (CSR) Goals	( )	( )	( )	( )	( )
Economic Relief / Budget Planning	( )	( )	( )	( )	( )

Q4.C Please state any additional objectives/goals you think a sabbatical program would benefit the organization (versus the individual):

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Q5.C As a Human Resources (HR) professional, please indicate the extent you agree or disagree with the following statements:

I believe a non-academic workplace sabbatical program would be beneficial to the **organization**.

- a. Strongly agree
  - b. Somewhat agree
  - c. Neither agree nor disagree
  - d. Somewhat disagree
  - e. Strongly disagree
- 

Q6.C I believe a non-academic workplace sabbatical program would be beneficial to the **individual**.

- a. Strongly agree
- b. Somewhat agree
- c. Neither agree nor disagree
- d. Somewhat disagree
- e. Strongly disagree

End of Block: Partial Survey

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Start of Block: Demographics

## DEMO.1 Industry Type:

<input type="checkbox"/>	–	<input type="checkbox"/>	Hospitality & Tourism
<input type="checkbox"/>	Accounting	<input type="checkbox"/>	Human Resources & Recruitment
<input type="checkbox"/>	Administration & Office Support	<input type="checkbox"/>	Information & Communication Technology
<input type="checkbox"/>	Advertising, Arts & Media	<input type="checkbox"/>	Insurance
<input type="checkbox"/>	Banking & Financial Services	<input type="checkbox"/>	Legal
<input type="checkbox"/>	Call Center & Customer Service	<input type="checkbox"/>	Manufacturing, Transport & Logistics
<input type="checkbox"/>	Community Services & Development	<input type="checkbox"/>	Marketing & Communications
<input type="checkbox"/>	Construction	<input type="checkbox"/>	Mining, Resources & Energy
<input type="checkbox"/>	Consulting & Strategy	<input type="checkbox"/>	Real Estate & Property
<input type="checkbox"/>	Design & Architecture	<input type="checkbox"/>	Retail & Consumer Products
<input type="checkbox"/>	Education & Training	<input type="checkbox"/>	Sales
<input type="checkbox"/>	Engineering	<input type="checkbox"/>	Science & Technology
<input type="checkbox"/>	Farming, Animals & Conservation	<input type="checkbox"/>	Sport & Recreation
<input type="checkbox"/>	Government & Defense	<input type="checkbox"/>	Trades & Services
<input type="checkbox"/>	Healthcare & Medical	<input type="checkbox"/>	Non-Profit Organization

## DEMO.2 Number of Years in Business:

- a. Less than 1 Year
- b. 1 to 5 Years
- c. 6 to 10 Years
- d. 11 to 15 Years
- e. 16 to 20 Years
- f. 21 or More Years

## DEMO.3 Company Size:

- a. Small (1-250 employees)
- b. Medium (251-1,000 employees)
- c. Large (1,001-10,000 employees)
- d. Extra Large (10,000+ employees)

DEMO.4 Have you personally taken a paid or unpaid sabbatical?

- a. Yes
- b. No

*Skip To: DEMO.5 If DEMO.4 = Yes*

*Skip To: End of Survey If DEMO.4 = No*

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DEMO.5 How would you describe the experience overall?

- a. Far exceeded expectations
- b. Exceeded expectations
- c. Met expectations
- d. Short of expectations
- e. Far short of expectations

**End of Block: Demographics**

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