

# Sabbatical Planning Guide

April 2025

Congratulations, you're about to go on sabbatical!

## **Purpose of Sabbatical**

A sabbatical offers an opportunity for self-development for the employee. It is important for GEO to give our employees time to focus on their creative endeavors both personally and professionally to feel refreshed, renewed and energized for the next phase of their tenure. And it is a meaningful way to reward employees for their contributions.

As you prepare for this exciting milestone, we have put together this document. This guide will help you through the steps needed to take to prepare for your sabbatical. It is divided between items you should do before leaving for your sabbatical and steps you should take upon your return.

Supervisors are responsible for a smooth transition for direct reports to their interim supervisor during a sabbatical. The direct report must be supervised by someone from the leadership team.

## **Before Sabbatical**

How to be approved?

P&C will identify and make notice to all eligible employees annually in November for the upcoming year. Once notified, the employee will need to provide at least two date preferences within 45 days of the notice. Employees who have the longest tenure (hire date) will have first right of refusal of their first choice of dates.

GEO reserves the right to approve sabbaticals in its sole discretion. The supervisor and/or the department head along with P&C will discuss all sabbatical requests. P&C will follow up with final approval. The Employee generally must be without performance concerns including but not limited to a Success Plan or Progressive Discipline Action within the previous six (6) months. No more than two (2) Employees can be on sabbatical at any given time. If there are more than two (2) Employees who request and meet the eligibility criteria, approval will be based on the Employer's business needs. Sabbaticals requests must be made at least three (3) months in advance and must be approved by the Employee's direct supervisor. A sabbatical plan must be shared across the organization no later than two (2) weeks prior to the sabbatical start date, otherwise the Employer reserves the right to rescind the approval. The needs of the team and the Employer are among the factors that may be considered when approving sabbaticals. We recommend using this template to document your sabbatical plan.

Sabbaticals that are four (4) weeks or less do not require a full plan; however, adjustments to work plans to accommodate the leave should be consulted with and approved by the supervisor. The time off should be managed similarly as if you were taking annual leave.

### **I'm approved for a sabbatical, what's next?**

It is important for the employee to be 100% unplugged to fully take advantage of this special time off. To do that, the following areas should be considered:

#### **Calendar**

How will your calendar be managed as incoming appointments arrive in your mailbox? Think through who will be managing your calendar while you are gone and meet with them to establish agreement on how they will handle your calendar.

- Share with the person what you would like your schedule to look like the first couple weeks back – some people prefer less meetings and more free time to catch up.
- Cancel all recurring internal check-ins until you return. (There is no easy way to cancel a portion of recurring meetings in Outlook; they must be removed one-by-one.)
- Think about recurring internal/external meetings team members may need to have during your absence so they can be scheduled in advance; e.g., weekly check-in meetings between supervisors and direct reports.
- If possible, schedule your return from sabbatical to be midweek. Returning to a full week your first week back can be a difficult transition.

### **Email**

- Create an out-of-office message. The message should indicate who to contact while you're away and when you will return to the office. If one of your designated contacts receives an email, they should provide you with a status of the email which can be included in your planning document.

### **Credit card/Charge Card procedures**

Do you have a GEO credit/charge card?

- Concur only:
  - Set up another person as proxy in Concur who will be submitting the monthly Concur. Suggested proxies – your supervisor or someone who already has access to your inbox (see Operations for assistance or refer to Staff Resources/how-to guides for instructions)
  - Send all of your receipts/upload all your receipts to Concur's receipt repository before your departure and ensure that your proxy has access to all the receipts for the purchases for the next financial close period, as well as for any recurring expenses.
- Bill Spend & Expense Charge Cards:
  - Make sure all the receipts for charges are uploaded before you leave on sabbatical. Recurring charges should not be made on Bill S&E Charge cards.

### **ADP**

Submit your leave request for the dates of your sabbatical in the ADP system.

### **Asana**

Make sure nothing is due during your sabbatical and/or assign it to another individual.

### **Slack**

Pause notification. You may also choose to delete Slack from your phone during your sabbatical.

### **Role handoff**

This section provides general handoff guidance as other members of your team will be covering your roles while you are out.

Talk with your supervisor to see what your plan for coverage is while you are out. Whether you have one person covering your role or multiple, establish who will be doing what and if it is necessary to bring in someone externally to fill in the gaps.

- In the month before your sabbatical, have transition meetings with people covering your role to discuss what they may need to handle and identify things that should be delayed until your return. Be sure to:
  - Give a clear sense of prioritization to those taking on your work (must do, nice to do, okay to delay, etc.)
  - Create a status report that is updated right before sabbatical starts so that it's clear exactly where projects left off
- After having transition meetings with your role coverer(s) and your direct report(s) separately, have one with everyone together to clarify roles and responsibilities. Consider using the MOCHA framework to talk through major pieces of work. Be sure there's a shared understanding of where the temporary supervisor is stepping in and where the decisions are left to direct reports.
- Consider holding your performance review conversation/check-in before you leave, if applicable.
- If you lead a team, consider having a full team transition meeting so that the roles and responsibilities agreed to by the role cover(s) and direct report(s) will be understood across the entire team. Include any other staff that are likely to be significantly impacted. Give team members a chance to ask questions and clarify roles and expectations.
- Consider having another meeting with your role coverer(s) close to your departure date. Let the role coverer guide the conversation. Some topics might include:
  - What happens in the course of an average week?
  - What is the percentage of new responsibilities the role coverer is taking on?
  - What conversations should happen in the course of doing X project?
  - Which of these projects *might* be permanent shifts to the role coverer?
- Set up new points of contact for vendors and consultants if you are the primary contact and schedule a hand-off conversation between the vendor/consultant and the person taking over your role if necessary.

### **Passwords and keys**

What passwords do you regularly use? Do you have the keys to any locked cabinets/doors? Because you will forget a lot while you are out of the office for a while, it's helpful for people on your team to have your regularly used passwords and any keys.

- Use LastPass or other organizationally approved software to manage access to passwords.
- Leave behind keys that colleagues may need to use.
- If you are the sole administrator on any software, please ensure someone else on the team is added as a backup administrator or has access to your inbox. Consider moving administrator roles.

### **Capturing information while you're gone**

How will you know what happened while you were out? People on your team and those covering your role should document information and updates so that you can get up to speed on what happened while you were out on sabbatical.

- Staff temporarily supervising your direct reports should document any personnel

- conversations and positive, constructive feedback to help inform performance reviews.
- Request that your team add updates to the sabbatical planning document under the notes section to help you get up to speed upon your return. The notes should capture key decisions and updates in addition to a running list of issues including:
  - What the issue(s) is (are)
  - How it was resolved
  - Next steps

### **Cell phone/Voice mail**

Do you have your GEO email synced with your cell phone or a google voice number? During your sabbatical, you shouldn't have access to your work email. The point is to really disconnect from work and nothing can spoil that faster than seeing those little notifications appear on your phone or watching the number of unread messages constantly racking up.

- Turn off work email syncing at the end of your last day in the office. Those messages will load when you turn on the sync again, so you won't lose them.
- Remove call forwarding from your GEO office line to your cell phone and change your voice mail to email while on leave. Please consult Operations if you need assistance.

Finally, read through the **“Returning from Sabbatical”** checklist before you leave so that you and your team have the outline of a plan in place for your return.

## **Returning from Sabbatical**

### **Timing of your return and commitments**

Here are some lessons learned from previous sabbatical takers about coming back to the office.

- Role coverers should be available when you return. Be sure you are clear about your return date so that your team knows when to expect you back.
- Sabbatical takers should refrain from having to speak at external facing events or meetings until after you've been back at work for several weeks. It takes time to get back into GEO-speak and turn back on all the language and nuance in our work.

### **Getting up to speed**

Give yourself time to settle back into your desk, read necessary emails, and process the changes. Meanwhile, your team will have worked on the planning document adding notes to get you up to speed upon your return.

- Think about the questions you want to ask your team.
- Think about what you need the details of, and what you just need a current update on.

### **Reflection**

Will you make changes to your role and how you do your work when you return? Sabbaticals are a natural time to hit the reset button. You may have reflected on how to have a healthier, more productive workday. When you return:

- Consciously think about the work habits you were planning on breaking (e.g., working long hours, being more intentional about taking walking/standing breaks, etc.)
- Take a fresh look at how you do your work and consider asking your team (more

specifically the person who helped cover your absence if you are a supervisor) the following questions\*:

- What did you learn about your work and about yourself while I was away?
- What responsibilities did you take on that you want to keep? (if relevant)
- What can't you wait to give up? (if relevant)
- What recommendations do you have for me about how I'm doing my job?

### **Role transitions**

How will you transition roles back from people who stepped in while you were out? When you return, roles will change again; both for people who were taking over your role and your direct report.

- Schedule a post sabbatical transition meeting between yourself, your direct report(s) and their temporary supervisor(s).
- Decide if team members who were covering aspects of your role will continue to work on those aspects.

### **A Potential Re-Entry Schedule:**

- Day 1: Settle back into your desk. Speak with your colleagues socially and get the updated planning document focusing on the notes section.
- Day 2: Begin to figure out where to plug back into your work. Where can you help/jump back in, and where should others wrap up what they've started?
- End of week 1: Have a reflective conversation with your supervisor to discuss any realizations you had while away; any work habits you are avoiding/breaking; any shifts in roles you are considering.
- Week 2: Have reflective conversations with your role coverer(s) and direct report(s). See the questions under "Reflection" on the previous page.
- Week 2: Prepare for performance reviews. Schedule a separate meeting with the temporary supervisor on your direct report(s) to get performance review information from them while it's fresh. (Put something in writing so you can refer to it at year-end.)
- Week 3: Solidify any shifts in the workload. Be explicit with colleagues about what you are trying to do differently and why. Share any goals you've set for yourself after this "reset" period.
- One month back: Have a broader, reflective conversation/sharing about your time away and any insights you've had into GEO and/or your work after your return.