

SABBATICAL GUIDELINES AND RESOURCES FOR PROFESSIONAL CHURCH WORKERS

North Wisconsin District, LCMS

*"Those that wait upon the Lord
shall renew their strength:
they shall mount up with wings like eagles,
they shall run and not be weary,
they shall walk and not faint. (Is. 40:31)*

The North Wisconsin District – LCMS provides this document as guidance and encouragement to congregations and schools of the North Wisconsin District that seek to develop their own sabbatical policies and guidelines. These guidelines were presented and approved at the May 2009 North Wisconsin District Board of Directors meeting.

PROLOGUE

What is a Sabbatical?

The word "sabbatical" is derived from the Biblical idea of "Sabbath." God himself sets the pattern for Sabbath in Genesis 2:1-4a and would later command the people Israel (Exodus 20:8-11) to set aside 1/7th of their time for rest and renewal. Historically, the giving of a sabbatical year has most frequently been practiced in academia. The belief is that professors are so drained by six years of ongoing teaching and research that their continued academic work will greatly benefit from a year of rest, reflection, reading, writing, and reeducation for their field of endeavor. Within the life of the church, international missionaries have regularly received sabbaticals in the form of furloughs which allowed them to be re-energized by relationships back home and also to gain perspective and knowledge to take back to their ministry. As the church in America has come to see itself as serving in one of the world's largest mission fields and thus has desired of its professionals a higher level of visionary leadership and specialized skills, local churches have also seen the great benefit of sabbaticals for its professional staff. Sabbatical leaves are designed to benefit the professional person (avoid burnout, refresh the spirit, engage the mind, gain perspective, knowledge, and skills) and the church organization (re-energized leadership, clarity of vision, healthy models of the Christian life).

Why Do Our Church Workers Need Sabbaticals?

Workers in the church need to recreate and restore what has been worn down by day-to-day encounters with reality. Nourishing one's body, mind and spirit and regaining perspective requires a change of pace and place—a pilgrimage. Jesus provides us a good example to follow. He actively nourished his whole person, body, mind and spirit—in prayer, in teaching, in travel, in time alone, in rest and in the caring for people. By his example, the apostles who walked and worked with him learned from him and benefited as well. Jesus told his disciples in Mark 6:31: "Come with me by yourselves to a quiet place and get some rest."

That is what sabbatical is about—an extended pilgrimage away from the “normal” activities of life as we know it in the exercising of the roles, functions and responsibilities or our vocations and into others which restore, renew, rebuild, and rejuvenate the whole person, body, mind and spirit. It is a significant change of life and living for an extended period of time that ultimately benefits the person, his/her family and the ministry of call.

What Does a Sabbatical Look Like?

Sabbatical typically includes time for prayer, meditation, reading, writing, resting, reflection, fasting or other diet management, traveling, visiting new places and engaging in new experiences and experiencing different cultures. The best sabbaticals usually are more open-ended than rigid, allowing for the surprises, and possible new direction, that may come. Jesus’ forty days in the wilderness marked a turning point in his ministry. David tended sheep and learned valuable lessons about God’s care and provision. Paul, struck down on the road to Damascus, disappeared into the desert of Arabia for three years, and emerged with a new vision. Sabbatical is a time to rest, receive, be nurtured, and reflect on your relationship with God and your own story, so that the worker can be renewed, refreshed and revitalized by the breath of God.

I. VALUES AND ASSUMPTIONS

- A. Giving support to professional workers in maintaining good health benefits the worker, the congregation/school and the church at large.
- B. Healthy professional workers build healthy congregations and schools. A sabbatical can rightly be considered an “investment” in your professional workers.
- C. When there is a good match between the professional worker and a congregation/school, a long term ministry is desirable. In such instances, a sabbatical is cost effective. A congregation can lose two or more years of effective pastor care during pastoral transitions.
- D. Good self-care is proactive and preventative. A regularly scheduled sabbatical keeps a professional worker healthy physically, spiritually and emotionally, reducing the potential for burnout, compassion fatigue, and the negative effects of prolonged stress.
- E. It can enable him/her to achieve a new sense of vision, a new perspective, renew his/her calling, evaluate his/her gifts and skills and the needs of the ministry.
- F. A professional worker who practices good self-care remains healthier and may extend his or her life and ministry.
- G. The sabbatical time can open up new opportunities for members to grow in service and be a blessing for the congregation/school and church at large.

- H. A sabbatical leave should be an ongoing intentional part of a congregation's/school's ministry, not a reaction to crisis (i.e. burnout, forced removal, etc.).
- I. Sabbaticals are a way that congregations/schools can minister to their professional workers and to the worker's family.
- J. Every congregation and school has its own unique challenges and resources and therefore needs to develop its own sabbatical "policy" or guidelines.

II. RECOMMENDATIONS AND GUIDELINES FOR DEVELOPING A SABBATICAL POLICY

A. Determine The Time Parameters

i. When?

1. Timing is crucial so as to minimize disruption to the congregation/school. Plan long in advance to prepare the congregation/school for a smooth transition. The professional worker and congregation/school will need about a year to plan the sabbatical.
2. When scheduling the sabbatical, priority should be given to the desired activities of the professional worker—e.g., if a class is offered only in the fall, the sabbatical would necessarily take place at that time. With proper planning, *any* time can be appropriate for a sabbatical.

ii. How long?

1. The North Wisconsin District recommends three successive months + vacation time (not in place of) every seven years of professional service to the church.
2. Clarify and distinguish vacation and sabbatical (A sabbatical is not simply a "reward" or vacation, but an important part of the working relationship between professional church worker and congregation/school.)
3. Ask: Can the sabbatical purpose and goals be achieved in the time available? If not, either the sabbatical's goals need to be reduced or the schedule expanded.

B. Determine Financial Arrangements

- i.** A continuation of *full salary and benefits* during sabbatical (except car allowance) is advisable.
- ii.** *How* will this be financed? Some options might include:
 1. Entirely financed by the congregation/school where this is possible. This could be provided for in the annual budget or through special gifts.
 2. The congregation/school and professional worker each contributing 3% of salary and housing to a sabbatical fund each year. After five years the professional worker would be able to take a three month sabbatical, plus vacation, with pay. The funds accrued, plus interest, minus Concordia Plans expenses would be paid to the professional worker over the period of the sabbatical.
 3. Retired professional workers may be willing to contribute one or more sabbatical periods to make it possible for congregations/schools with limited resources to provide a sabbatical. (If a worker leaves the ministry of this setting before taking a sabbatical, the portion plus interest he/she contributed to the "sabbatical fund" should be returned to him/her as taxable income.)
 4. Alternate financing may be available, depending on the nature of the sabbatical (e.g. Wheat Ridge, Thrivent, Lilly Foundation, etc.)
- iii.** What about additional costs? (e.g. supply preaching, pastoral assistance) If the congregation/school saved an additional 1-2% of the worker's salary, it should have sufficient funds to cover the cost of a replacement church worker during the worker's sabbatical.
- iv.** Would the congregation/school assist with tuition costs, where it is applicable and feasible?

C. Make Specific Sabbatical Plans

- i.** Design
 1. Sabbaticals are very individual. There is no right or wrong plan, though a plan should demonstrate some benefit to be derived by both the worker and the congregation/school. There needs to be mutual agreement by the professional church worker and congregation/school on the sabbatical plan. It is useful to have a "mentor" (one who has done it) help develop the plan. Will the sabbatical be programmed or open-

ended? For what purpose? Spiritual growth? Theological reflection? Creative expression? Pastoral concerns? Research in a given area? Writing a book or a manuscript? Prayer, reflection and meditation? Physical health restoration? Combinations of these? Other?

A. Options might include:

- a. Encounters with other cultures and with Christian communities in other countries, especially less developed ones (e.g. mission trip).
- b. Research or writing on independent projects or as part of a formal seminar or academic program.
- c. Directed reflection on personal and spiritual issues, recreation and rest.
- d. Working in an outdoor setting.
- e. Involvement with specific community, social, or cultural needs or ventures.
- f. Engaging in activities that reconnect and rebuild family relationships.

ii. Purpose

1. Is it for rest, spiritual renewal, new experiences and relationships, intellectual growth, decision-making time, travel, and/or family time?
2. What does the professional worker want (dream, hope) to happen to himself/herself personally? How would he/she like the congregation/school and his/her family to benefit?
3. A sabbatical is a time to NOT DO what you normally do. The worker should not see this as another time to be as busy as he/she was before, just in another setting and on a different subject.

iii. Physical setting

1. This could be a retreat center, foreign travel, home, and/or university, etc. The potential settings are almost limitless and one sabbatical may involve a number of them. Be creative. (See ***Focus on the Family Pastoral Retreat Guide*** for possible retreat locations. Also, many districts in LCMS operate camps and/or retreat areas of their own. The Lutheran Annual and the LCMS website should have further information.)

2. Boundaries are important and need to be established in writing and agreed upon—For example: a complete absence from the congregation/school, even when the worker is in town. Typically, the worker should not be contacted by the congregation except in the case of emergency—and what constitutes an “emergency” needs to be defined and agreed upon.

iv. Other Considerations

1. The congregation/school may want to appoint a Sabbatical Committee (three-five members, which would include the President, an Elder and a School Board representative if person on sabbatical is in the school) to assist both the professional church worker and congregation/school in planning the sabbatical.
2. Recognize that it may take at least two years of education to help the congregation/school leadership understand the value of the sabbatical the first time they offer it. Do not rush this. Gain the congregation’s/school’s ownership and support.
3. Clarify sabbatical benefits to professional worker and congregation/school. A good sabbatical meets a mutual need. What does the worker want to happen to himself/herself personally? How would he/she like the congregation/school to benefit? What can be special for his/her spouse, children and friends? What is in it for them? What will they gain? What will it cost?
4. What is the congregation’s/school’s plan for pastoral care and public worship during sabbatical? What is the congregation’s/school’s plan to replace the professional worker during his/her absence? What responsibilities need to continue and how will they be taken care of? (The sabbatical time should NOT be viewed by the congregation/school as a “holding period” while the worker is gone. Ministry should continue and grow during a sabbatical.)
5. Are there any restrictions being placed on the professional worker following the sabbatical? (e.g. The worker agrees to remain for at least one year following sabbatical) The sabbatical is not a time for a worker to pursue another call or employment elsewhere. However, if during the sabbatical a worker prayerfully discerns that this call or professional ministry is not their calling, then the matter needs to be addressed in a forthright and God pleasing manner.

6. What if multiple staff members desire a sabbatical at the same time or in overlapping times?
7. Can the sabbatical be broken into two or three segments? Does it have to be three months? Could it be more? Less?

v. Following The Sabbatical

1. A "Reentry Plan" is crucial. There will be a need for worker and congregation/school to reconnect. A feeling of being "out of touch" is not unusual. Both the pastor/professional church worker and congregation/school are in a different place following the sabbatical. It is helpful to "re-negotiate" roles and expectations as a part of the reentry process.
2. A "welcome back" event, such as a congregational meal, may be used as a way to thank those leaders/workers who filled in during the sabbatical as well as welcome the returning worker home.
3. Submit a report to the congregation/school. This is a time for debriefing and reconnecting. Share with the congregation/school which sabbatical goals were met, what discoveries were made, what insights were gained. Recommendations for changes in future sabbatical planning would also be appropriate.

D. Additional activities that may be helpful to the professional worker between sabbaticals.

- i.** Take quarterly 48-hour retreats for spiritual renewal.
- ii.** Invest in a continuing education opportunity.
- iii.** Engage in an activity outside the congregation such as coaching little league baseball, participation in a community theater, etc.
- iv.** Begin meeting with a spiritual mentor or coach.
- v.** Get involved in a peer support group.
- vi.** Take regular weekly time off.

IV. RESOURCES:

- (1) Alban Institute, www.alban.org
- (2) Sample policy for congregation employee handbook (Appendix A)
- (3) A Sabbatical Planning Check List (Appendix B)
- (4) Questions for a Professional Church Worker to Consider when Developing a Sabbatical Plan. (Appendix C)
- (5) Sabbatical Information Seminars for congregations

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Sample Sabbatical Policy

Sabbatical Leave Policy for Full-time Church Workers

Walther Lutheran Church
Holsteinview, Wisconsin

The purpose of the Sabbatical leave is to provide time for professional church workers to gain perspective on ministry by stepping out of it for a specified length of time. During the Sabbatical, the church worker will engage in a special project, study, travel, mission, retreat, or other planned activities for renewal. This Sabbatical leave is a part of the ministry of this congregation, and the planning and implementation of the Sabbatical are part of our pastor's or church worker's job to maintain his/her professional skills and his/her spiritual growth.

I. Eligibility and Length of Sabbatical Leave

The full-time called church worker is eligible for a sabbatical leave after serving at Trinity for 4 years. The available time allowed is as follows:

Ordained Ministers:	_____	After 4 years—1 month
	_____	After 7 years—3 months
	_____	After 11 years—1 month
	_____	After 14 years—3 months
	_____	After 18 years—1 month
	_____	After 21 years—3 months
	_____	Etc.

Our pastor(s) is encouraged to take sabbatical leaves as scheduled; therefore there will be no banking of months.

Commissioned Ministers and Others:	Every 4 years the church worker is eligible for 1 month. Worker can bank and accumulate months up to 3 consecutive months.
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The amount of time allowed and funds budgeted for annual education and study leave ordinarily provided continues, except in the year of the Sabbatical, when they are applied to the Sabbatical. Sabbatical leave time is not vacation time. More than one church worker can take a sabbatical leave in a given year, but not during the same period of time.

II. Procedure for Sabbatical Leave

Sabbatical leave procedures are to be considered flexible so as to accommodate unusual opportunities that may develop.

A. Before

1. At least 6 months prior, the church worker will submit a Sabbatical leave plan so that the church worker and congregation can continue planning together. The plan is to be submitted to the Sabbatical Review Committee. The Sabbatical Review Committee will consist of a representative(s) from the Board of Elders, Church Council, called staff, and the congregation. The plan is reviewed and discussed with church worker, with adjustments being made as necessary. The plan is then given to the President of the congregation who will recommend the plan to the Church Council and Board of Elders for approval.
2. The Sabbatical leave plan should include the following:
 - a. Personal objectives and leave objectives.
 - b. A description of the major elements of the experience.
 - c. Proposed beginning date and end date.
 - d. Suggestions of how current job responsibilities will be handled during the leave.
 - e. A description of any anticipated budgetary implications.

B. During

1. A complete break from all professional duties and parish responsibilities shall be in effect for the church worker during the entire period of the Sabbatical leave.
2. When possible the church worker will make a brief progress report to the Sabbatical Review Committee.
3. The members of the congregation will work together with remaining staff and/or professional replacement(s) to maintain and enhance the mission and ministry of the church.

C. After

1. Within a month of return from sabbatical leave, the church worker will submit a written report and evaluation of the leave to the Sabbatical Review Committee, Church Council, and Board of Elders, with a summary to be delivered to the congregation.
2. Ordinarily, the church worker will continue service at this congregation for at least one year.

III. Finances

- A. Salary, housing, and benefits shall continue for the church worker while away on their Sabbatical.
- B. The Sabbatical is a necessary part of our church worker's professional, spiritual, and business life, and expenses will be reimbursed for up to \$500

per month. This amount is to be reviewed annually by the Sabbatical Review Committee. The church worker will present itemized billing for reimbursed business expense.

- C. The congregation will establish a Sabbatical Fund in an interest bearing account with an annual budget allotment of \$1,500 or more. Donations can be made by congregation members to be added to the account.
- D. Sabbatical Fund monies will be distributed according to needs inherent in the Sabbatical plan. (Approximately one-third available monies would be used to provide for professional service replacement, if necessary, and two-thirds are available for reimbursement of Sabbatical expenses incurred by the church worker while on leave.) Ordinarily, only monies available from the Sabbatical Fund will be used to support Sabbatical related expenses.

How can a Sabbatical help the congregation?

- A Sabbatical can be a great time to develop lay leadership that might otherwise not step up because “the church worker does that.” A well-planned Sabbatical can be a great occasion for re-visioning, re-invigorating, and recommitting lay leadership.
- It can give the congregation and especially its leadership a much clearer picture of what actually happens in the congregation and what the church worker does.
- It may be a time for the whole congregation to get into the “Sabbath” mood—a distinctively counter-cultural stance of letting go and letting God, and rethinking the “busyness” of congregational, family, and individual life.
- The Sabbatical can be a means by which the church worker can bring back to the congregation new ideas picked up from other churches.
- The congregation will benefit by letting the church worker experience life from the perspective of the pew, which can help the church worker sympathize with some of the concerns and assumptions of the people of the congregation.
- In some cases, the Sabbatical may be a time for equipping the church worker for a new challenge or program chosen by the congregation.

Notes to Church Worker about arranging for a Sabbatical

- First, assume that it will take at least 2 weeks to disconnect from parish life mentally and emotionally. You can begin whatever program or plans you have in mind right away, but it will take a while to adjust.
- Keep track of your time well before the Sabbatical and at different times of the year (e.g. one week in September, in July and in April). Use it to assess how you spend your time and as a reminder of tasks that need to be done

while you are gone. Also, this will provide specific evidence for the leadership and congregation of what you do and why you need a Sabbatical.

- Keep a journal before, during, and after your Sabbatical (what you are doing, learning, feeling). This will help you not only discover what the Sabbatical is doing for you, it will help when you report back to the congregation, and it will help planning the next Sabbatical.
- Plan to be gone completely. Do not return for weddings or funerals, and make this clear before you go. If the congregation is well aware of this before you go, you should not have any problems.
- Make specific plans for your Sabbatical, even if your plan is to sleep late and rest a lot, and discuss the plans with the Sabbatical Review Committee, Church Council, and Board of Elders.
- Include the congregation as much as possible in your Sabbatical planning. Communicate, communicate, communicate! Be sure they are “on board.”
- Reflect on how you want to do your “re-entry” when the Sabbatical ends. Be sure to thank and recognize the lay leaders who helped you while you were gone. Be sure to report back—perhaps a written report mailed to all members of the congregation.

Sabbatical Schedule

Beginning in 2009

Since the Sabbatical Leave Policy begins in 2009, and Trinity wants to give some credit for past service, the Sabbatical schedule for each of our full-time called workers will be as follows:

“Worker A” will be eligible for a 1-month Sabbatical in 2009 which can be banked. His/her next opportunity for a 1-month Sabbatical would be in 2013.

“Worker B” will be eligible for a 1-month Sabbatical in 2010. His/her next opportunity would be 3 months in 2013.

“Worker C” will be eligible for a 1-month Sabbatical in 2011. His/her next opportunity for a Sabbatical would be 3 months in 2014.

APPENDIX B

Sabbatical Planning Check List

Twenty-four Months Prior

- Review and discuss the upcoming sabbatical with appropriate board chair.
- Review call documents and sabbatical policy.
- Draft potential dates on calendar.

Twelve Months Prior

- Appoint Sabbatical Committee
- Seek input from congregation leaders and members regarding sabbatical plan.
- Update Congregational Operations Manual/"Who Does What" list.

Six Months Prior

- A Sabbatical Request, in cooperation with the Sabbatical Committee, is presented to the appropriate council or board within the congregation/school that includes the following information:
 - Purpose of the sabbatical
 - Plan and timing of implementation
 - Compensation arrangements
 - A plan for a report to the congregation/school after the sabbatical
 - If not yet completed, arrangements for "covering" the professional church workers responsibilities

Three Months Prior

- Arrangements for "covering" the professional church workers responsibilities are completed.
- A daily log of parish/school happenings is assigned to an individual (for review when the worker returns.)
- Notify district office and Circuit Counselor of intended sabbatical and pertinent details.

Sabbatical Begins

- Interim staff arrives, is welcomed by congregation, meets with congregational chair and sabbatical committee chair to review the Congregation Operations manual.

End of Sabbatical

- Celebrate the return of the worker.

One Month After

- A report of the sabbatical experience is presented to the congregation or appropriate board/committee.
- Communicate with congregation about the sabbatical experience.

APPENDIX C

QUESTIONS FOR A PROFESSIONAL CHURCH WORKER TO CONSIDER WHEN DEVELOPING A SABBATICAL PLAN

- In what areas of my life do I need renewal of health and hope?
- How can I broaden and deepen my faith and vision during my sabbatical?
- What are my strengths, gifts, and competencies that I could build upon during this sabbatical time?
- What are the areas of greatest stress in my work and life?
- What are the most important things I hope to experience during the remaining years of my life?
- What are the things I would like to let go of?
- What are the things I have been praying for?
- What are my core values?
- What would I like to learn or experience during this sabbatical time?
- What changes would I like to make in my life or work?
- Can I envision what it would be like to move into a three-month sabbatical?
- What will I do initially?
- What will it be like to be released from ministry duties?
- How can I include my spouse and family in the sabbatical time?
- How will my home life be different?