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**An Examination of the Benefits and Costs of Sabbatical
Leave for General Higher Education, Industry, and
Professional-Technical/Community College Environments**

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Abstract

The purpose of this literature review is to examine the differences in the use of sabbatical leave among the arenas of general higher education, industry, and professional-technical/community college. The purposes and policies applied to sabbatical leave, along with the cost of using sabbatical leave in these three environments are compared and contrasted to determine what similarities and differences exist. The potential benefits of the use of sabbatical leave to enhance organizational commitment are then examined. The result of this review can be used to determine the need for further study of how sabbatical leave might be used in professional-technical and community colleges to the benefit of the faculty, students and organizations.

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Introduction

Community colleges have been in existence in the United States for 100 years (Pederson, 2001). Their original focus was a liberal arts education, much like a university. During the Great Depression that focus changed to job training, and today's community colleges have progressed to a point of offering both (Goan & Cunningham, 2007). The professional-technical components of the community college system are instrumental in providing job skills for many professions not generally requiring the 4-year degrees offered by universities.

Having an educated populace is beneficial to everyone. Professional-technical education has an important role to play in educating those who wish to go beyond high school but are perhaps ill-prepared, unwilling, or simply unable to afford to attend a university. According to a study done of California's system by UC Berkeley, for every dollar spent on a community college, there is a gain of three dollars, while for every dollar not spent there is loss of two dollars (Sturrock, 2005). This gain is realized through better educated populaces that have better jobs, pay more taxes and are less likely to rely on social services. This suggests that education not only pays for itself, but it also infuses money into our systems beyond what is originally spent in community college monies.

To provide quality education, it is critical that the professional-technical faculty in community colleges are not only well-trained, but also kept fresh and active in their fields of emphasis. One method of providing well-trained, fresh and motivated professional-technical faculty is the use of sabbatical leave. Sabbatical leave has existed in some form for many years. In English translations of the Hebrew scripture this period of rest is generally referred to as the Sabbatical Year, it has also been called the Sabbath Year, Fallow Year, Year of Rest and Year of Remission (Endres, 2001). This year of rest

was originally created for the land (Endres, 2001) rather than for the people, but in allowing the land to rest it naturally occurred that the people received rest as well. Hebrew sabbatical practices were created to revitalize all people and land; in academics it was designed to revitalize faculty (Bast, 1992).

Sabbatical leave is viewed very differently by people at various levels of higher education. Some see it as a right; others see it as a privilege. The arguments range from the idea that everyone deserves a sabbatical at a regular interval whether they have a specific project in mind or not, to the idea that only tenured faculty with a legitimate, demonstrated need should be granted sabbaticals (Endres, 2001).

Sabbaticals give professors in general higher education the opportunity to pursue and refine their research interests, something which heavy teaching loads often prohibit (Mindell, 2009). The focus of sabbaticals for professional-technical faculty is focused on new and improved skills rather than research; but like those in general higher education, full teaching loads often prevent them from gaining these skills. The sabbatical leave allows for professional growth that should bring the faculty member back to the college or university with new and improved skills, published works or new methods of teaching. The ultimate beneficiary is the student (Endres, 2001).

Community colleges play a critical role in providing professional-technical and work force training (Gilroy, 2009). The need for qualified instructors who are able to stay current in their fields is important in providing this training. Instructors who spend years teaching may have difficulty maintaining current skill sets and industry credentials without taking time away from teaching to maintain and update them. Sabbatical leave is one option that can be used to help these faculty members.

Many community colleges provide professional-technical programs for their communities. To provide these programs they hire faculty members who are experts in these technical fields. In order to maintain this high level of expertise it seems critical that these faculty are given time to actively engage in their fields. Sabbatical leave is one method of providing them this time. While some of these institutions do have policies in place for sabbatical leave for their faculty others do not. The use of sabbaticals can be an expensive endeavor for a community college so it is critical that need is determined when deciding whether to implement it or not. This problem of establishing need is one that must be addressed so sound decisions can be made by institutions considering the use of sabbatical leave.

The purpose of this article is to distinguish between the needs, benefits and costs to general higher education faculty, industry professionals, and professional-technical faculty in the use of sabbatical leave. Benefits and costs to be considered will include those to the faculty/professionals as well as the institutions, organizations and communities they serve.

Following are the questions this article addresses:

1. What possible costs exist for the faculty/employees, the institution and the community when implementing a program for sabbaticals for professional-technical faculty, other higher education faculty and industry professionals?
2. What possible benefits exist for the faculty/employees, the institution and the community when implementing a program for sabbaticals for professional-technical faculty, other higher education faculty and industry professionals?
3. Is there a difference in purpose, and therefore a difference in sabbatical policy implementation, for

professional-technical faculty, other higher education faculty and industry professionals?

Sabbatical Leave in General Higher Education

Institutions of general higher education include all colleges and universities that offer educational services beyond the high school level. Sabbaticals in academia can be traced back to a need for an incentive to attract potential faculty members to Harvard University in the late 1800s (Carr & Li-Ping Tang, 2005). According to Birkhead (2009), when policies for sabbaticals were originally established in academics, they were meant to allow instructors “to have a change of scenery; to experience a different university or research institute; to learn new techniques, to develop collaborations or to write papers or a book” (p. 25).

Sabbatical leave policies in general higher education vary in their implementation but often loosely follow the Biblical tradition of sabbaticals for the land by allowing up to one year of sabbatical time for every 6 years spent teaching. The sabbatical time is paid at a percentage of the faculty member’s full salary which varies depending on whether a full year is taken or if the faculty member takes the option of only one semester. Following is an example of a policy from Southern Illinois University Edwardsville that follows this norm:

Preamble: Board of Trustees policies 2 Policies C-3-(b-S) provide that sabbatical leaves for faculty shall be granted only on the basis of an approved plan designed to improve the professional performance of the applicant and benefit the institution. What follows are the SIUE policies pertaining to the implementation of that Board policy.

1. Continuing members of the academic faculty may become eligible for sabbatical leave upon completion of a period of meritorious service as defined by this policy. Such leave shall be granted for purposes of (1) research or creative activity that will enhance the faculty member's academic and professional stature and contribute to the academic reputation of the University, and (2) scholarly study to advance knowledge in the discipline or other areas of professional expertise.

2. A continuing member of the academic faculty shall become eligible for a full sabbatical leave at the end of not less than six years of full-time service from the initial date of full-time appointment or six years of full-time appointment from the terminal date of a previous sabbatical leave. With the exception of faculty time paid through an external grant, all time spent on unpaid leave of absence shall be excluded in determining years of service. Full sabbatical leave may be granted for a maximum period of six months at one hundred percent of salary or for twelve months at fifty percent of salary. ("Sabbatical Leave Policy", 2008, para. 1-3)

Multiple reasons can be found for wanting and using sabbatical leave. These include learning new techniques, developing research, conducting research, studying, writing, conducting reviews, creating art work and developing courses or curriculum (Sima, 2000). This list is not all inclusive, but is given here as an example.

The benefits of sabbaticals in general higher education are three-fold. There is benefit to the faculty member, the

institution and the student. For the faculty member, it serves to allow for rejuvenation, reflection, fresh perspectives, opportunity for development of new professional relationships, staying current in his or her discipline and ultimately enhancing teaching (Sima, 2000). For the institution, it offers increased faculty efficiency, versatility, productivity, strengthened programs, enhanced learning environments, higher morale, increased institutional loyalty, enhanced faculty recruitment and retention and enhanced overall academic climate and reputation (Sima, 2000). These benefits combine to offer the ultimate benefit to students by having knowledgeable, well-prepared, motivated faculty in their classrooms.

The cost of a sabbatical is borne both by the faculty and the institution. The faculty member must provide his or her own funding for the activities he or she engages in during the sabbatical. This can be accomplished through use of personal funds, grants, fellowships, loans and so on. The cost to the institution includes covering or canceling classes and paying for benefits, and continuing to pay the faculty member's salary during the absence. Since many sabbatical leave policies only allow the faculty member to collect a percentage of his or her salary, the resulting salary savings can be used to recover some of these costs. When a sabbatical is being supported with the full-salary for the faculty member the institution administration must make a decision to set aside funds to cover these expenses.

Sabbatical Leave in Industry

While sabbatical leave has been around since the late 19th century, it had typically been used strictly in academia. After World War II, industry started to look at its uses but did not really embrace sabbaticals in a real way until the 1960s. At

that time union negotiations allowed steel and aluminum workers to be given 13-week sabbaticals to allow for retraining (Greengard, 2000). Next, other large organizations such as Control Data and IBM began allowing sabbaticals for non-production employees. As organizations began to become more competitive and the work more intense, they also realized the need to give employees a break (Greengard, 2000).

The Society for Human Resource Management reports that in 2007 about 16% of U.S. employers offered unpaid sabbaticals and 4% gave paid ones (Lublin, 2008). While the need for sabbaticals in industry appears to be valid, Carol Sladek, head of Hewitt Associate Incorporated's Work/Life Consulting Practice in Lincolnshire, Illinois, states, "Many employers still have a hard time offering a big chunk of time off, whether it's paid or unpaid, to employees just because it's difficult in terms of operations." (Clark, 2010)

Sabbatical leave in industry takes on many forms. The Abacus Planning Group, Inc. requires all employees to take a four-week, paid sabbatical every five years. During this sabbatical they are not allowed to have any contact with their office and are asked to spend the time reflecting on their career and life ("Abacus Wins Praise", n.d., para. 2). The Journal of Accountancy includes an example sabbatical policy on its website for use by accounting firms. This example suggests sabbaticals be offered every five years with a duration of three months for partners and two months for managing associates with full pay and benefits ("Sample Sabbatical Program Policy", n.d., para. 1-2). PricewaterhouseCoopers offers two types of sabbaticals, one for personal growth and the other for social services. Employees are paid between 20 and 40 percent of their regular salary and are permitted to take up to six months for their sabbatical (Sahadi, 2006). Companies like Microsoft only allow sabbaticals for upper-level employees

and require that some job/career related performance standards are met (Semas, 1997).

The purpose of sabbaticals varies but several common themes exist throughout industry. Organizations use sabbatical leave to retain employees by preventing burnout which leads to low productivity, depressed morale and high turnover. They use it as a recruitment tool to draw in top performers. They even use it to help in ethics issues which can arise when one employee may perform a job for years without anyone else ever seeing what he or she really does (Carr, Li-Ping Tang, 2005).

Employees also have multiple purposes for using sabbatical leave. Based on company policy they may use it as they would a vacation, or they may use it to learn a new skill that will improve their performance in their position. Individuals also may take the opportunity to take a look at their personal mission to determine if they are truly where they belong, opening up the potential for career changes based on what is learned on sabbatical (Hubbard, 2002).

The benefits to industry of offering sabbatical leave to employees are several. Depending on the type of sabbatical offered, the benefit could be as simple as gaining the goodwill of employees. But for some sabbatical types an organization will get employees back with new skill sets that can add to their productivity (Larson, 2005). If offering sabbatical leave helps them to retain their current employees, organizations can also benefit when they do not have to spend money to hire and train new employees (Bolch, 2006). A critical benefit to employees is the potential to avoid burnout and remain in a position for the long term, gaining increased levels of responsibility and respect. It can also give them renewed focus on their jobs and enthusiasm for the work they do (Paul, 2002). The use of sabbaticals will allow for more creative and

effective employees and can improve the financial bottom line (O'Sullivan, 2008).

Concerning benefits to an organization, Lublin (2010), founder of Dress for Success, states, "If we want to keep good, sane, driven people in the field, we have to change" (p. 1). To accomplish this goal she gives several changes that need to be made in her industry that may apply to others as well. One of these changes she gives states of employees, "Give them a break. After two-and-a-half years at Do Something, employees can take a month long paid sabbatical to do volunteer work if they commit to another year" (p. 1). According to Andrew Clark of the John Lewis Partnership, staff who are given and take advantage of sabbaticals return with renewed commitment and new perspectives (Clark, 2010).

One notable exception to the general benefits of sabbatical leave may exist when we look at organizations which have mandatory sabbatical leave. The word mandatory tends to have negative connotations and may leave people with the impression that their organization is in some way causing them harm by forcing them to take time away from their jobs. The Cripps Harries Hall firm made major revisions to their mandatory sabbatical policy, changing it from requiring partners to take three months away from work every ten years to taking six weeks off every five years (Ganz, 2008). Their reasoning for creating sabbaticals seems valid. It allows partners to recharge while away from work while allowing those who stay behind to recognize that no single individual is irreplaceable. The employee attitudes were at times, however, found to be detrimental rather than positive (Ganz, 2008).

The cost to business in implementing sabbaticals can be high depending on the type of sabbatical they grant. When offering paid sabbaticals there can be high cost in filling positions while the employee is gone. There is also the cost of maintaining benefits for the employee, which is often part of a

sabbatical policy for both paid and unpaid leave (Carr & Li-Ping Tang, 2005). It is even possible that industry may choose to implement sabbaticals as a cost saving measure. Rather than lose employees permanently, they may give mandatory sabbaticals at no pay saving them salary money along with future recruitment budgets (Berris, 2009). The BT Group, a provider of communications services, has offered its people a sabbatical of up to one year at 25% salary with the general purpose of allowing for individual, personal renewal while at the same time saving the company money during a downturn in their industry (Churchard, 2009).

Other costs are not always directly related to money. They include lost productivity of the worker on sabbatical along with increased workload for those remaining. There is the risk that the employees will find other jobs while on sabbatical and not return (Larson, 2005). This cost can be mitigated by having strong, legal agreements with employees before allowing sabbaticals which require them to return to work for a set period of time upon the completion of their time away.

Sabbatical Leave for Professional-Technical Faculty

Professional-technical institutions may be independent schools or they may be incorporated into the community college system. They provide job skills for students who wish to enter the job market but do not wish to complete a full range of studies needed for general higher education degrees.

The traditional academic sabbatical was primarily designed to allow the faculty member to conduct research in his or her area of study. The need for professional-technical faculty to take sabbatical leave often differs from that of those teaching the more traditional academic subjects. One issue that differentiates higher, general education faculty sabbatical needs

from professional-technical faculty needs is that technical faculty teach technical skills. The technology that they use and present to their students can change rapidly (Petty, 1985). For example, consider the field of Information Technology, in which the skills a technician needed 20 years ago are significantly different from those that are needed now (Marriott, 2001). Keeping these skills current requires continuing involvement and study in the field.

Another issue that differentiates the needs of professional-technical faculty is the standards that are being adopted nationwide for student achievement. The adoption of student achievement standards in professional-technical education is requiring complete re-engineering of the teaching methods currently in use (Moore, 2007). In the state of Georgia, a plan has been developed and implemented that ties the student standards to the professional development of the faculty (Foster, 2009). Sabbatical leave can allow faculty to spend quality time in other colleges learning from other faculty and can allow them to take classes to learn new methods for reaching these standards. This would go beyond professional development that may be provided during the school year.

There is another issue of emerging fields. Professional-technical faculty need to stay ahead of newly developing technology (Drage, 2009). In order to remain competitive in a global market, students require training in high-growth, high-demand job skills (Emeagwali, 2010). To teach these skills requires that faculty stay current in them. On the opposite end of the spectrum, some of the older fields have the potential to die out if high standards of training are not maintained. Examples would include professions such as watch repair or fine instrument repair. Training in these fields can be very labor intensive and expensive to offer and require faculty to be experts in their fields (Predmore, 2005). Sabbatical leave

could be used to allow faculty to re-enter their fields and practice and refresh their skills.

These types of issues have created the need for sabbatical leave that allows for re-immersion in the field for technical faculty in addition to time for taking classes, visiting other institutions and having time for general renewal.

Current sabbatical leave policies often address sabbatical leave from a research perspective but do not address the needs of professional-technical faculty. An example from the Frostburg State University Faculty Development and Sabbatical Subcommittee Handbook is as follows:

1. Potential Enhancement of the University.

Examples: Work done under a government or foundation grant.

Scholarship potentially leading to publication.

Creative work potentially leading to a publication, performance, or exhibition.

2. Maintenance or Improvement of Skills and Knowledge.

Examples: Additional course work beyond the terminal degree (or, in exceptional cases, toward the terminal degree) or in an alternate field.

Scholarship.

Creative and artistic work.

Development or alternative teaching strategies.

3. Course, Program, or Curriculum Development not to include work routinely performed by Faculty Members without a Sabbatical Leave or work for which release time is provided.

Examples: Development of a new course, program or curriculum.

Reorganization of a course, program, or curriculum.

A major consideration is the need for the sabbatical to accomplish the work proposed. (*Frostburg State University Faculty Development and Sabbatical Committee Handbook*, p. 9)

An example from Marshall Community and Technical College differs in its stated purposes and seems more likely to meet the needs of the professional-technical educator.

SECTION 5.9. SABBATICAL LEAVE

5.9.a. Purpose: A sabbatical is to provide activity that will improve teaching effectiveness, develop professional competency, and increase contribution of service to the college and its community.

5.9.b. Descriptions: A sabbatical is a compensated leave of absence of one or two semesters for a nine-month faculty member and twelve months for administrators. Sabbaticals shall be granted for approved projects involving full-time independent study, research, or any creative work that will generate new teaching skill and abilities and enhance professional growth and development. ("Policy# 5.00", 2005, p. 1)

The key difference between the two examples is that Marshall's stated purposes include the items to develop professional competency and to enhance professional growth and development. These items are critical for professional-technical faculty in their attempt to remain competent in the fields they teach.

The benefits of sabbatical leave for professional-technical faculty to the institution include several key items. The institution has the potential to be nationally recognized if it has high-level experts in the fields. An example from the

Madison Area Technical College is Marline Pearson, who was recognized in a PBS documentary based on the results of her work while on sabbatical (Madison Area Technical College, 2010). In order to receive national recognition for a program it is critical that faculty maintain the highest levels of proficiency in their fields, which a sabbatical can allow them to do. Another key benefit would be the same one indicated for general higher education and industry: faculty members return to work revived and refreshed and ready to continue with their institution (Benshoff & Spruill, 2002).

Conclusion

This review of existing literature indicates that sabbatical leave has a place in academia as well as in industry. Differences do exist in the benefits, costs, and implementation for the three areas examined. A benefit that was common to the three areas was that of renewal and refreshing of the employee upon return from sabbatical leave. A benefit that differed is that many general higher education sabbaticals result in research products that are not seen as often in industry or professional-technical education. A unique benefit appears in industry: those left behind were able to learn new skills by filling in for the employee on sabbatical.

A common cost was the replacement of personnel during their absence. A difference in cost was seen in cost mitigation. In either education setting the use of partially paid sabbaticals allowed for payment of part-time/adjunct instructors to fill class loads. In industry the cost was more often absorbed by not replacing the employee and allowing their duties to fall on others in the organization.

The examples of institutional sabbatical policies show similarities in sabbatical leave implementation between the two areas of education, but considerable differences in industry. In

the educational settings sabbaticals were generally set to run based on semesters. Sabbaticals in industry were more often implemented in weeks and months and were shorter. There also appeared to be more stringent requirements placed on educational sabbaticals while industry sabbaticals had looser requirements.

The literature supports the idea that the use of sabbatical leave in general higher education, industry and professional-technical education can be of benefit to both the institution granting it and the person receiving it. For general higher education the purpose tends toward research needs; in industry the purpose tends toward refreshing, renewing and retaining personnel; and in professional-technical education the purpose is usually to allow the faculty member to update/maintain the technical skills they are teaching in the classroom.

The cost of sabbaticals for professional-technical faculty to institutions is very similar to what is borne by the other two environments. The length of the sabbatical will influence payment of all or a portion of salary and benefits along with the cost of covering the faculty member's course load with part-time/adjunct faculty. The potential cost of losing faculty exists in this realm as in the others and can be mitigated by clear statements of policy concerning return to work after sabbatical completion.

The benefits of sabbatical leave for professional-technical faculty differ from those seen in general higher education and industry because of a difference seen in the purpose of the leave. While general higher education is seeking research benefits and industry is seeking revitalization, professional-technical institutions are seeking improved knowledge of current industry standards and skills. The benefits to the organization are tied directly to the purpose of the sabbatical.

Improving organizational commitment is a goal for any organization desiring to excel in all aspects of its mission. Employees with commitment beyond simple fear of their inability to find another job or sense of obligation will do more than simply fulfill their contractual obligations. They will go above and beyond them for their organization (Golding, 2007). Sabbaticals are one benefit that may be used to influence this organizational commitment.

This literature review would indicate room for further research of sabbatical leave both in practice and policy. Further study would benefit those charged with determining the goals, costs and benefits in each of the three environments. Comparing the overall goals of the organizations and the impact of sabbatical leave in reaching those goals should enhance appropriate organizational use of sabbatical leave.

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