

APPENDIX B

Sabbatical Policy Review

Mandate

When a significant new policy is introduced by the General Council, the expectation is that the effectiveness of the policy would be reviewed between 3 and 5 years following the implementation of the policy. The review is often specifically ordered in the proposal that introduces the policy.

The 38th General Council established a policy providing a three month sabbatical leave once every five years for ministry personnel serving pastoral charges (2003-08-10-GC38-152). Further work followed in order to establish the procedural and funding requirements to implement the policy, and the current sabbatical policy became effective January 1, 2006. A General Council Sabbatical Leave Grant was established to provide funding for pulpit supply to pastoral charges according to financial need. Subsequently, a General Council program was established to provide sabbatical funding for up to three interim ministers per year who would otherwise not serve an individual pastoral charge long enough to qualify for a sabbatical.

A review of the policy was anticipated for 2011. Correspondence received by the Permanent Committee on Ministry Employment Policies and Services (PC-MEPS) confirmed that a review was warranted. The PC-MEPS established a Working Group in April 2011 with a mandate to review the existing sabbatical policies and provide a recommendation to the Pastoral Relations Policy Review Task Group no later than July 8, 2011, which will report to the PC-MEPS in the fall of 2011. The review was asked to address the following questions:

1. Is there evidence that the provision of sabbaticals contribute to building stronger and longer pastoral relationships?
2. Should the sabbatical policy be more flexible?
3. What has been the financial impact of the sabbatical policy on pastoral charges?
4. Should sabbaticals be provided to other members of pastoral charge staff?
5. What have been some of the barriers to compliance with and support of the policy?
6. Does the Sabbatical Leave Grant provide adequate support?
7. Take into consideration the health and well-being of ministry personnel
8. What is the impact of sabbaticals on the mission of the United Church of Canada in the world

The PC-MEPS named to the working group members Jack Spencer and Eleanor Scarlet. Joe Ramsay was assigned as staff support to the group, with Angie Musonza as administrative support.

Methodology

The working group agreed to begin the review by conducting an online survey based on the questions identified by the mandate. Over 4000 ministry personnel and lay leaders were directly emailed and invited to participate in the survey. Between June 18 and July 11, 718 responses were received.

Survey Results

The Responses

Of the 718 responses received, 646 valid responses were received from 465 ministry personnel and 181 lay members. The responses were representative of the Conferences relative to size, with British Columbia providing the greatest number of responses at 17.8%, and All Native Circle with .3%. Of the 465 ministry personnel who responded, 90% were members of the Order of Ministry, and 10% were Designated Lay Ministers.

Use of Sabbaticals

When asked whether a minister in the congregation had taken a sabbatical since 2007, 47% of congregational members said yes, and 53 % said no. Ministry personnel reported that 25% had taken a sabbatical since 2007, and 75% had not.

Effect on Pastoral Relationship

Of the lay members and ministry personnel who indicated that they had experienced a sabbatical within the last 4 years, 51% claim that it had a positive effect on the pastoral relationship, 21% that it had no effect, 14% believed it had a negative effect, and 14% were unsure.

Impact on Ministry Personnel, Congregations, and the Wider Church

The vast majority of ministers and lay members who had experienced a sabbatical in the congregation reported that it was of benefit to the minister's health and well-being to a high, or some, degree (85%). Nearly 70% also indicated that sabbaticals contribute to the mission and ministry of the pastoral charge – 20% reported a high degree of contribution, and 48% reported some degree. When asked whether sabbatical leaves are one way of supporting the mission of the United Church in the world, 48% said Yes, and 25% said Somewhat.

Influence on Length of Pastoral Relationship

Those who had experienced a sabbatical themselves, or as a member of a congregation where the minister took a sabbatical, were asked what effect they thought the sabbatical had on the length of time the minister would stay in the pastoral relationship. Over 45% indicated that the sabbatical has played a role in the minister staying longer than otherwise would have been the case. About 32% thought that the sabbatical made no difference. Nearly 10% indicated that the pastoral relationship ended within a year of the sabbatical.

Financial Impact

Most lay members and ministry personnel indicated that providing a sabbatical posed some challenge, or a significant financial challenge to the pastoral charge (59%) although 41% reported that finances were not a challenge. Most respondents were uncertain about the availability of funding sources to help with the sabbatical itself (43%) while only 22% believed that adequate funding was available. Almost 60% of respondents who had not taken or provided a sabbatical believed that sabbatical grants to pay for pulpit supply need to be \$2000 or more for the three month period. Only 13% felt that \$1000 (the current amount available) was adequate.

Sabbaticals for Non-ministry Staff

When asked whether the sabbatical provision should be extended to other pastoral charge staff, other than ministry personnel, only 14 % were supportive. Many were undecided (33%) although 54% clearly stated that sabbaticals should not be extended to other staff.

Compliance with the Policy

Respondents who indicated that they had neither taken nor provided a sabbatical in their pastoral charge were asked to indicate what they saw as challenges to compliance with the policy. The vast majority named financial resources as the greatest challenge (87%). The absence of the minister, or unavailability of supply minister, was also seen as challenges (33% and 39%). Almost 30% indicated that complying with the policy was a challenge because members of the congregation disagreed with the policy. There were 158 narrative responses indicating other challenges. Many responses commented on the need for better communication and education about the policy and the rationale, a greater variety of models on which to base a sabbatical, more options for funding a sabbatical, and clarity about the purpose of a sabbatical (rest and recreation, or continuing education and vocational development).

Narrative Comments

Respondents were given an opportunity to provide narrative answers to the questions "How do you think the sabbatical policy/program could be improved?" and "Is there anything else you would like to say to the committee?" There were several themes that emerged from these questions. They included:

- *financial challenge is seen as a challenge to accommodating the provision of sabbaticals*
- *the perception of financial challenge becomes either a disincentive for ministry personnel to request a sabbatical, or creates tension in the pastoral relationship on the subject of sabbatical leave*
- *there are many views or assumptions about the purpose of sabbaticals, ranging from a sense of reward or entitlement for service ("an extended vacation") to an opportunity for study and reflection on the current pastoral work ("extended study leave") to an opportunity for rest and reflection from the vocation of ministry on the whole ("break from ministry regardless of time in current pastoral relationship")*
- *unfair that the pastoral charge bears the cost for the sabbatical, unlike sabbaticals provided in other professions where the cost is shared (for example, the "4 over 5" model in most school boards)*
- *sabbaticals seen as too generous – lay members don't have such benefits in their jobs*
- *difficult to schedule a sabbatical either because of personal reasons (can't be away from family) or work reasons (too long to be away from pastoral charge, too difficult to find supply minister)*
- *suggestions that there should be more communication throughout the church about the benefit experienced by those who take a sabbatical leave, and congregations who have facilitated a leave*

Analysis

The Practice of Sabbaticals

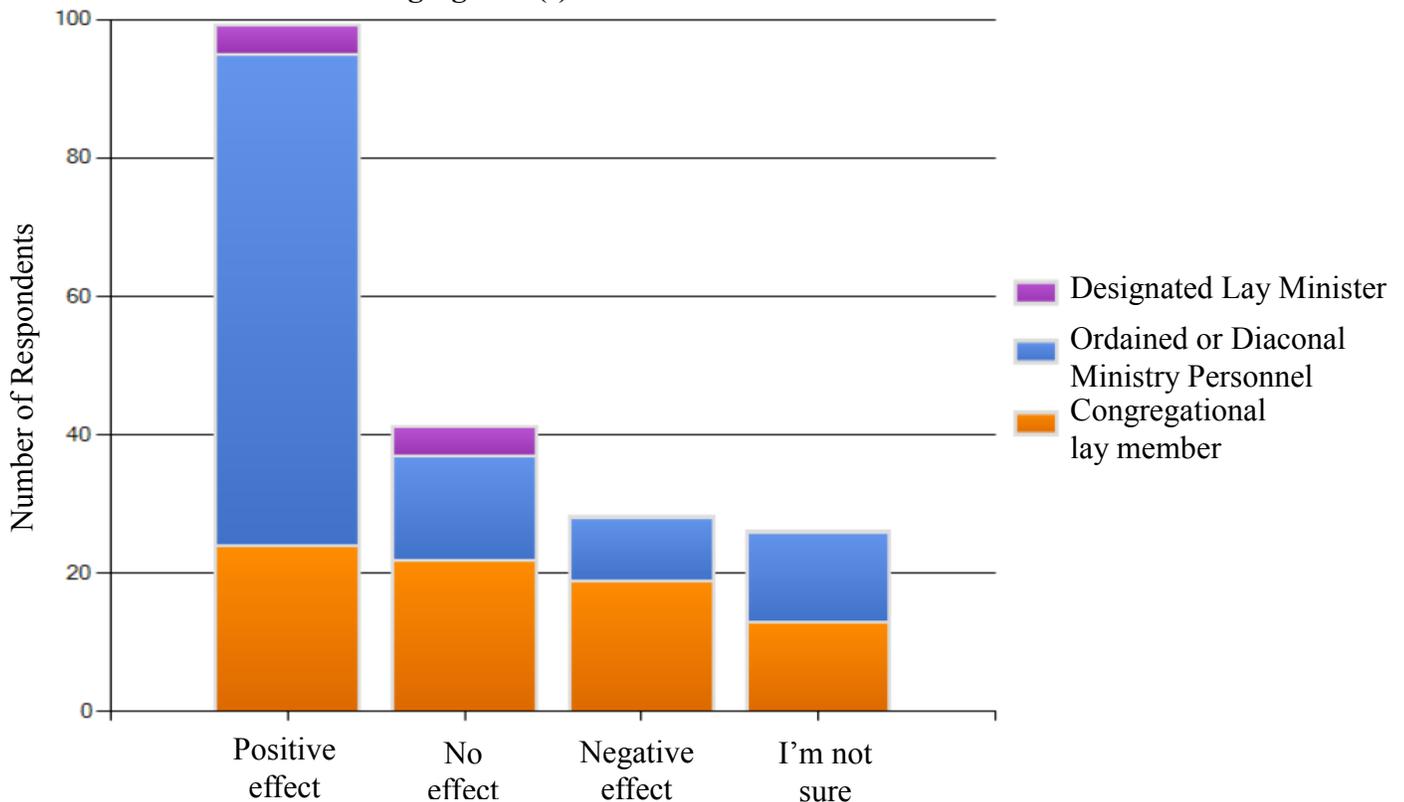
The number of sabbaticals reported since 2007 indicates that since the introduction of the sabbatical policy the practice of sabbatical leave has become common. Overall, ministry personnel report that 24.2% have taken a sabbatical since 2007. Accounting for the number of pastoral relationships that would not have met the criteria (55.7% report being in a pastoral relationship less than 5 years) this number is as great, or greater than, what the working group anticipated. Of those who have been in the same pastoral relationship for more than 5 years, nearly half (44.7%) indicate that they have taken a sabbatical since 2007. Furthermore, 18% of ministry personnel indicated that they had taken a sabbatical, and have moved to a different pastoral relationship.

The Gap between Lay Members and Ministry Personnel

The results of this survey indicate that there are important differences between the perceptions of lay members and ministry personnel. The most significant of these are:

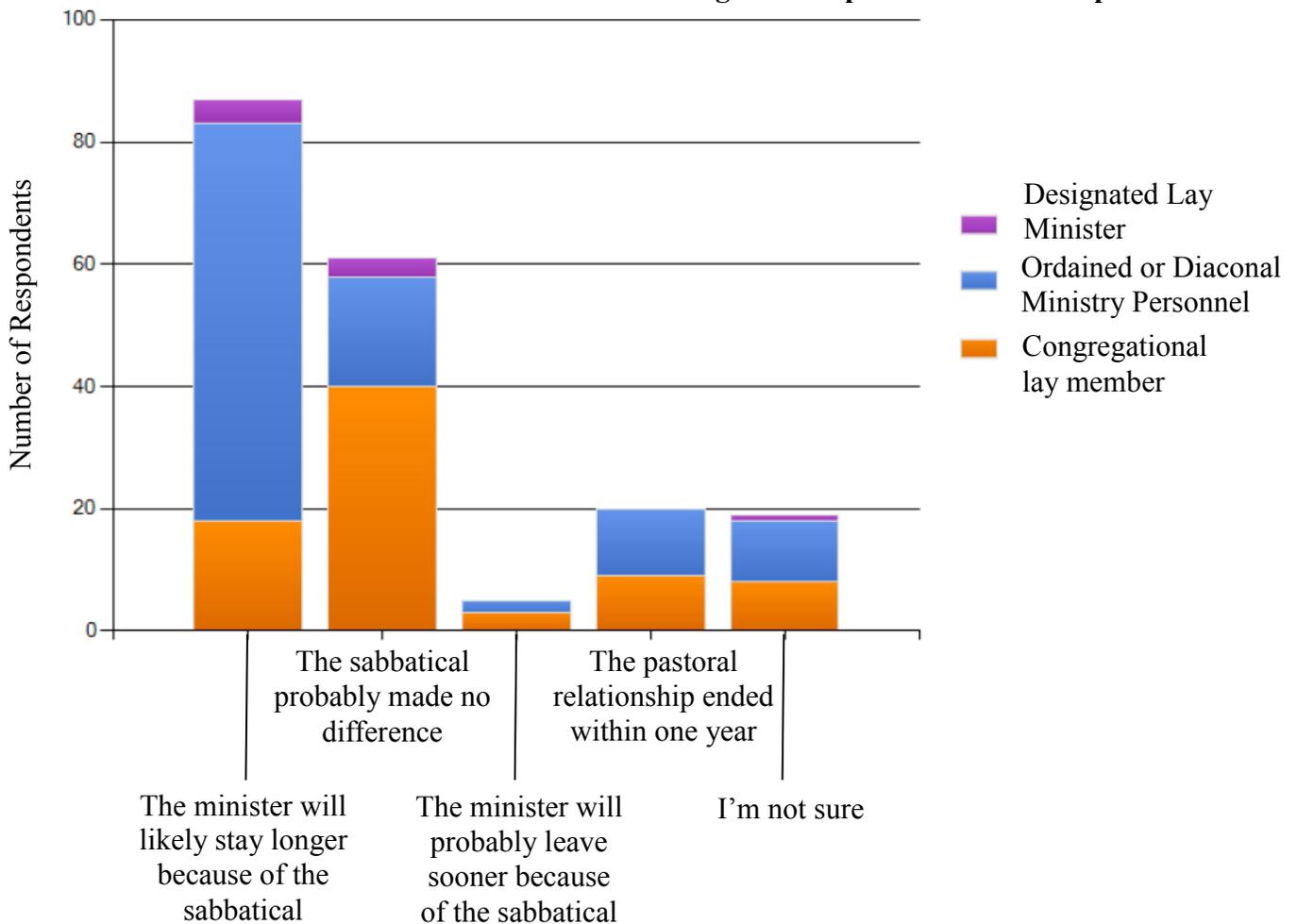
- 96.2% of ordered ministers and 100% of designated lay ministers who had a sabbatical indicated that the sabbatical contributed to their health and well-being. Only 67.6% of lay members in congregations where ministers had a sabbatical perceive a contribution to the minister's health and well-being.
- 24.4% of lay members believed that the sabbatical had a negative effect on the pastoral relationship, while only 8.3% of ministry personnel experienced a negative effect, and no designated lay ministers felt the sabbatical had a negative effect.

What effect did the sabbatical have on the relationship between the minister and the members of the congregation(s)?



- 81.5% of ordered ministers and 100% of designated lay ministers believe that their sabbatical contributed to the mission and ministry of the pastoral charge, compared to 35.6% of lay members.
- 89.4% of ordered ministers and 62.5% of designated lay ministers think that sabbatical leaves are a way of supporting the mission of the United Church of Canada in the world. Just over half (51.3%) of lay members view sabbaticals as supporting the mission of the church in the world.
- Almost 2 out of 3 ordered ministers (61.3%) and half of the designated lay ministers report that their sabbatical has contributed to extending the length of their current pastoral relationship. However, only 23.1% of lay members in pastoral charges where the minister took a sabbatical believe that the pastoral relationship will last longer because of the sabbatical.

What effect did the sabbatical have on the length of the pastoral relationship?



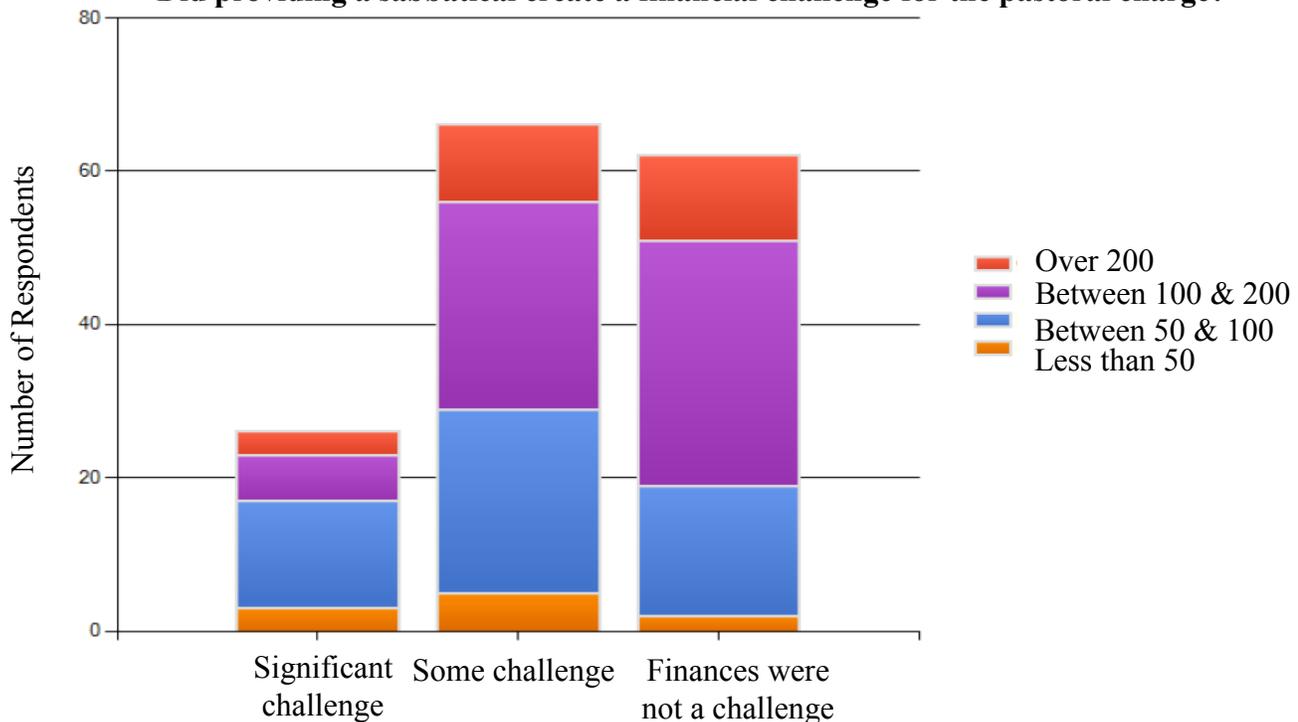
- 82.1% of lay members reported that the sabbatical was a financial challenge on their pastoral charge; only 42% of ministry personnel considered the sabbatical a financial challenge for the charge.
- Only 4.4% of lay members think that other staff should be provided with a sabbatical leave, compared to 21.5% of ministry personnel who think their staff colleagues should have a sabbatical.

The Gap between Small and Large Pastoral Charges

The survey also indicates differences between pastoral charges according to size.

- *The provision of sabbatical leaves varies according to congregational size.* In pastoral charges with less than 100 members at worship, only 15% of ministers reported taking a sabbatical, even though 37.6% have been on the charge for more than 5 years. This compares with 35.6% of sabbatical-taking ministers in pastoral charges of more than 100 at worship, while 53.4% have been there for more than 5 years. Accounting for the higher turnover in smaller pastoral charges, we are still left with the observation that ministers in churches of more than 100 people at worship are almost twice as likely to take a sabbatical as those in churches of less than 100.
- *Overall, smaller pastoral charges (ministers and laity) are slightly less inclined to say that the sabbatical has a positive effect on the minister's well-being, the health of the pastoral relationship, or the mission of the pastoral charge.* However, the differences were minimal – less than 10% in each case.
- *Larger churches believe sabbaticals contribute to the mission of the church in the world.* 80.6% of those in churches of more than 100 at worship responded that sabbaticals supported, or somewhat supported, the mission of the wider church, compared to 61.5% of churches of less than 100 worshippers.
- *The degree of financial challenge varies according to size.* 71% of the churches of less than 100 worshippers indicated that finances were a challenge and 52% of larger churches felt finances were a challenge. 26% of smaller churches indicated that the sabbatical created a significant challenge, while 10% of the larger churches saw the challenge as significant.

Did providing a sabbatical create a financial challenge for the pastoral charge?



The Need for Choices

One of the major themes that emerged from the narrative responses was the need for more flexibility in the provision of sabbaticals. Many alternatives were suggested, ranging from more frequent sabbaticals of shorter duration, to longer sabbaticals with less frequency.

The Need for Financing

The majority of respondents, who had not experienced or provided a sabbatical (86.5%), regardless of membership status or church size, indicated that the greatest barrier is inadequate financial resources. Several funding models were suggested, from self-funded (based on the teacher/school board model), to centralized denominational funding similar to the Employee Assistance Program. In spite of the fact that there is a fairly high degree of compliance with the policy, the survey results clearly indicate that tensions are created due to the financial challenges that sabbaticals create.

The Need for Clarity of Purpose and Outcomes

One of the greatest learnings from this study is that there is much diversity of opinion throughout the church about the purpose of sabbaticals, and the outcomes expected. The definition is found in the Manual 2010: that a sabbatical leave is "a period of time intentionally set aside for Ministry Personnel in pastoral relationships as an occasion for reflection, re-creation, and revitalization, unencumbered by their usual and customary responsibilities, and yet still receiving remuneration and benefits." The Manual elaborates on the current sabbatical model in section 039: "Each Ministry Personnel taking a Sabbatical Leave shall have a detailed plan of study, which must be related to the practice of ministry....The nature of the study or experience being proposed and the outcomes anticipated, the date of commencement, the duration, and other specifics of the Sabbatical Leave [must be approved]."

The understandings, or assumptions, expressed in the narrative answers, can be summarized in the following categories:

1. *Extended Vacation*: Some respondents clearly interpret "reflection, re-creation, and revitalization" to be similar to a vacation where the focus is on rest and freedom from work responsibilities.
 - *This isn't Study Leave; it is a Sabbatical Leave... a Sabbath...*
 - *The only kind of sabbatical I would be interested in would be a time of rest.*
 - *Allow clergy to use the time for rest and reflection instead of demanding what at times is little more than 3 months of work*
 - *My perception of many of the sabbaticals I have seen colleagues undertake is that they become glorified vacations with little product of value to the church/congregations beyond a well-rested minister*
2. *Extended Study Leave*: Some respondents clearly interpret the policy as providing a time for increasing the minister's capacity for leadership through intentional professional or personal development.
 - *In talking with those who have gone on a sabbatical it does not seem that the spirit of sabbatical is followed; namely that it is for study related to church ministry.*

- *I think there should be a process of stating the "goals" of the leave, and of then checking to see if those goals have, indeed, been fulfilled. It should not (inadvertently or otherwise) be turned into an extended "reading vacation" with no expected outcomes.*
 - *The sabbatical could have a negotiated purpose and perhaps not only fulfill the personal/professional goals of the individual, but add expertise that the pastoral charge deems it requires to go forward.*
 - *A much higher requirement for study and enrichment to the practice of ministry should be included*
3. *Enhancing the pastoral relationship:* Some respondents indicated that the sabbatical should contribute to the health of the pastoral relationship, the length of the pastoral relationship, and the ministry of the pastoral charge. In other words, the rationale for the sabbatical is for the benefit of the current pastoral relationship. In some cases, respondents felt that a sabbatical was only justifiable after 8 or 10 years, with the intention of moving into another lengthy phase of a pastoral relationship. This was reflected in comments like the following:
- *The presbytery should request a formal study plan from the minister and review his or her report at the end of the sabbatical period.*
 - *Instead of simply "a brief report" to the Board or other committee on the return of the ministry personnel from the study, there should be a detailed workshop/report on the study presented to the whole congregation indicating the connections and relationships of the study for the benefit and enhancement of the work of ministry in the Pastoral Charge. Folks want to know - "What is the benefit to us?"*
 - *This leave needs to be coordinated with the performance reviews so that the leave is earned and not simply automatic. The performance review needs to be robust so that it truly evaluates performance particularly around goals aligned with the mission of the pastoral charge.*
4. *Renewal of vocation:* Many respondents viewed the sabbatical leave as a reward for years of service, or as a way of reflecting on vocation or "taking a break" from ministry, or of professional development independent of the current pastoral relationship:
- *If there are to be sabbaticals, then any minister who has served a certain length of time (e.g. 5 years) should be able to take a sabbatical, not five years in the same charge.*
 - *It should be portable, so that a minister can count his or her years of service on one pastoral charge towards a sabbatical on another pastoral charge, instead of starting over again at 0 every time he or she moves.*
 - *Make it a requirement for all ministry personnel. Change the 5 years to 7 years and remove the stipulation that the ministry personnel has to be in continuous service with one pastoral charge.*
 - *Before developing an annual study plan or sabbatical plan, UCC clergy need a 'Competency self-assessment tool' for existing/future contemplated areas of ministry involvement that allow them to build a multi-year, complimentary framework of study and skills enhancement that assist the congregation and Church courts in understanding the who, what, where, when and why of what the clergy is proposing*

5. *Other Alternative Models*: Many respondents offered alternative models for the provision of a sabbatical. The following comments illustrate some of the options:
- *3 months, although very welcome, is actually not long enough to be effective. I wonder about the same sort of system that teachers have where one can work for 5 years for 80% of the salary and take a year off for pursuing some alternative venture, the first 3 months of which is REST!*
 - *What the policy states as a "minimum" seems to have become the default. What might happen if we talked about 3-6 months leaves and encourage creativity and innovation?*
 - *There needs to be greater flexibility of models that can be applied; for example, a longer sabbatical (6 months – 1 year) after long pastoral relationship (over 10 years), shorter extended breaks for rest and study at more frequent intervals (6 weeks every 3 years, minister participates in funding sabbatical (4 over 5 model).*

Conclusion

The sabbatical policy is being practised throughout the church, and there are clearly many benefits to the practice of sabbatical leaves. However, this study has revealed a number of ways that lay members and ministry personnel would like to see improvements in the practice of sabbaticals, the resources supporting sabbaticals, and the policy itself.

The working group concludes that there are steps that need to be taken in response to the assessment of the sabbatical policy to date:

1. Simplify the sabbatical policy that will be included in the Manual for the United Church following the next General Council. The policy should state the intended purpose of sabbaticals, the anticipated outcomes, and reference to further procedures and resources available. Details about models of sabbaticals, funding options, and the process to follow will be included in this additional policy resource.
2. Continue to evaluate the survey data and extend the study to focus groups in order to test models for sabbatical leaves, procedures, and resources.
3. Communicate more effectively through the General Council Office the rationale for the provision of sabbatical leaves and the resources available to support the policy.

Recommendation

The working group offers to the Permanent Committee and the Steering Group on Pastoral Relations Policy Review the following recommendation:

That the following policy be considered as part of the pastoral relations policies that will be proposed to the Permanent Committee,
A sabbatical leave is a leave of absence by ministry personnel from the regular responsibilities of a pastoral relationship for the purpose of preparing the minister for the next phase of work within the church. The timing of the sabbatical, the length of the sabbatical, financing the sabbatical and any continued obligation to the current pastoral relationship are dependent on the proposed outcomes of the sabbatical leave. All ministry personnel are entitled to propose a sabbatical leave, and every pastoral charge is obligated to consider the provision of a sabbatical leave. The Conference must approve each sabbatical plan and may order that a sabbatical plan

be implemented. There are additional policies and procedures that apply to sabbatical leaves. They are available from the General Council Office;

And that the General Council Office prepare resources on the models and procedures for sabbatical leaves to be presented to the Permanent Committee by the spring meeting of 2012;

And that the General Council Office take steps to increase awareness of the rationale for the sabbatical policy and the resources available to implement the policy.