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The California Wellness Foundation



sabbatical \sab-bat'-i-cal\ 1: a break or change from a normal routine (as in employment); 2: a leave - often with pay, granted for rest or travel.

Application Due March 14, 2007



The California Wellness Foundation

Sabbatical Program Application 2007

Postmark Deadline: March 14, 2007

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The California Wellness Foundation (TCWF) established the Sabbatical Program in 2003 to keep burnout, stress and fatigue from undermining the effectiveness of the leaders of nonprofit organizations. Based on the model established by the Durfee Foundation in Los Angeles, the statewide TCWF Sabbatical Program provides grants that enable executive directors to spend up to six months away from the workplace, relaxing and rejuvenating, and to return with renewed energy and dedication. To date, 28 sabbatical awards have been granted.

In the fall of 2007, TCWF will give up to eight \$35,000 grants to nonprofit health organizations, to provide their executive directors with well-deserved sabbaticals. Up to \$30,000 of the award can pay for the executive director's salary and benefits during their sabbatical. (Project directors in larger institutions are not eligible for this award.) The remainder of the grant is designated for the professional development of managers and staff who will assume additional responsibilities in the absence of the sabbatical recipient. This amount may be used for training, retreats, or workshops that would help develop organizational capacity.

Application Questionnaire

Name _____

Title _____

(Must be the paid executive director or CEO of a nonprofit health organization.)

Organization _____

Street address _____

City _____ State _____ Zip _____

Phone () _____ Work fax () _____ E-mail _____

Website _____

Organizational Information

Type of organization
(e.g., *community clinic, health advocacy organization*)

Region(s)/county(ies) served

Year organization was established _____

Employer identification number _____

Annual operating budget _____

Number of staff: Full time _____ Part time _____

Applicant tax status:

Tax-exempt 501(c) (3) organization (enclose IRS document)
AND

Not a private foundation under Section 509(a)
(enclose IRS document)

-OR-

A public charity, under Section 170(b)(A)(vi)

Currently in advance ruling period (enclose current IRS
advance ruling letter)

Government tax-exempt entity

Is the executive director responsible for fundraising? Yes No

Organizational Information *continued*

Does your organization have an endowment? Yes No

If yes, what is the size of the endowment? _____

Number of board members _____

Number of volunteers _____

Does your organization have a management structure/team?

Yes No If yes, please describe it (i.e.: size, structure, roles, etc.).

Do you have a second-in-command? Yes No

If yes, state this person's name and role within the organization

What is your annual vacation policy? _____

When was the last vacation you took, and for how long?

Does your organization have a sabbatical policy? Yes No

Have you ever taken a sabbatical (paid or unpaid)? Yes No

Personal Information

Number of years with present organization _____

Number of years in the nonprofit sector _____

Annual salary _____

Organizational/Sabbatical Questions

Please attach a narrative answering the following questions about your organization and yourself (no more than six pages):

- How does your organization address health?
- The TCWF grantmaking program prioritizes eight issues for funding: diversity in the health professions, environmental health, healthy aging, mental health, teenage pregnancy prevention, violence prevention, work and health, and women's health. Which one best describes your organization's work in health? If your organization's work does not fit into one of these prioritized health issues, then please describe your organization's work.
- How or why did you become engaged in your current field of work?

- During your current tenure, what achievement has made you most proud of yourself or your agency (e.g., developing a policy education campaign to address a health issue; restructuring the organization to maintain its viability)?
- If awarded a sabbatical, how will your responsibilities be covered during your absence?
- What three things would make your job more manageable and less stressful, and why?
- What other activities in the nonprofit health sector are you involved in at this time?
- What are the three most significant lessons you have learned along the way?
- Why are you applying for a sabbatical this year?
- How will you use this sabbatical for personal rejuvenation? What types of activities are you planning for this time period?
- What do you see yourself doing five years from now?

Projected sabbatical start date and length: _____

Please Note: Sabbaticals can begin October 2007 and must be completed by September 2008.

Budget

Budget must total \$35,000. Up to \$30,000 can be used to cover the executive director's salary and benefits for three to six months. The remaining balance of \$5,000 or more can be used for consultant fees, retreats, workshops, training and/or equipment that will assist in developing organizational capacity in the absence of the executive director.

Please attach a budget narrative describing how the funds will be spent for each line item below.

DIRECT COSTS

Personnel

Salary \$ _____

Fringe Benefits \$ _____

Total Personnel (A) \$ _____

Operating Expenses

Equipment \$ _____

Subcontract/Consultants \$ _____

Other Expenses \$ _____

Total Operating (B) \$ _____

TOTAL DIRECT COSTS (C) \$ _____

(A+B=C) \$ _____

INDIRECT COSTS (D) \$ _____

May be up to 15% of Total Direct Costs

TOTAL EXPENSES (C+D) \$ _____

In addition to the narrative and application, please attach the following:

- Annual Report and/or description of the organization (up to two pages);
- Resumé that covers, at minimum, the past 10 years;
- Names of three references, with contact information;
- A brief letter of endorsement, signed by the chairperson of your organization's board, that includes a preliminary plan for organizational management during your absence and upon your return, as well as a guarantee that existing health and other benefits would be maintained during sabbatical period;
- Names of members of the board of directors;
- Required IRS documents and audited financial statements (or IRS Form 990, if audit unavailable); and
- A photograph of yourself. Please send an original photo, not a photocopy.

Please note: If you are selected as a sabbatical recipient, your photograph, background information and responses may be used to develop the public announcement of your recognition.

Eligibility Requirements

Candidates must:

- Be a paid executive director or CEO at a nonprofit health organization. Project directors are not eligible.
- Have served in an executive director role (though not necessarily for one organization) for the past six consecutive years or more.

- Have served in the current executive leadership role for a minimum of three years.
- Be employed full-time at the applicant organization.
- Have the date and duration of the proposed sabbatical approved by the organization's board.
- Be willing to submit necessary reports as required.
- Not have any prohibited affiliation with The California Wellness Foundation. No director, officer or staff member of the Foundation, or any member of their immediate families, is eligible for a sabbatical from this grant.

Candidates' organizations must:

- Be located in California and provide health services - including health advocacy services - that directly benefit state residents.
- Address the particular health needs of historically underserved populations, including low-income individuals, people of color, youth and residents of rural areas.
- Be a nonprofit health organization that is exempt under Internal Revenue Code (IRC) Section 501(c)(3) and that are not private foundations as defined in IRC Section 509(a) or are public charities as defined in IRC Section 170(b)(A)(vi) or a government tax-exempt entity.
- Be able to sustain regular operations during the candidate's absence.
- Guarantee maintenance of regular health and other benefits to the candidate during his/her period of leave.

Questions?

To learn more about TCWF's Sabbatical Program and its previous recipients, please visit the Leadership Awards section on our website: www.tcwf.org

If you have any other questions, please leave a message at (818) 702-1970, and you will receive a response within 48 hours, or e-mail sabbaticalprogram@tcwf.org.

New!

We will host two informational conference calls for organizations interested in applying for the sabbatical. This is strictly voluntary and participation on the calls will have no bearing on the selection of awardee organizations.

February 20, 2007 at 2:00 p.m.

February 21, 2007 at 10:00 a.m.

Call-in number: (800) 503-2899 (wait for instructions, then dial access code: 7021961)

Eligible candidates should send the original and one copy of all application materials and attachments to:

The California Wellness Foundation / Sabbatical Program
6320 Canoga Avenue, Suite 1700
Woodland Hills, CA 91367

All applications must be postmarked by March 14, 2007. **Grant recipients of the 2007 TCWF Sabbatical Program will be announced in October 2007.**

Thank you for your interest in TCWF's Sabbatical Program.



Grantmaking for a Healthier California