

# **TCWF Sabbatical Program Award Application 2010**

Applications must be received  
by February 19, 2010



The  
**California Wellness  
Foundation**

*Grantmaking for a Healthier California*

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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.

The California Wellness Foundation (TCWF) established the Sabbatical Program Award 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 Award 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, 52 sabbatical awards have been granted.

In the fall of 2010, TCWF will fund up to eight \$35,000 grants to nonprofit health organizations in order to provide their executive directors with well-deserved sabbaticals. Up to \$30,000 of the award can pay for the executive directors' salaries and benefits during their sabbaticals. (Project directors in larger institutions and directors of programs under a fiscal sponsor arrangement 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

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NAME

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TITLE (MUST BE THE PAID EXECUTIVE DIRECTOR OR CEO OF A NONPROFIT HEALTH ORGANIZATION)

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ORGANIZATION

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STREET ADDRESS

---

CITY STATE ZIP

( ) ( )

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PHONE WORK FAX E-MAIL

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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)

Government tax-exempt entity

**Note: Non-functionally integrated Type III supporting organizations (per section 509(a)(3) of the Internal Revenue Code) are not eligible.**

Is the executive director responsible for fundraising/  
grantseeking?  Yes  No

Does your organization have an endowment?  Yes  No

If yes, what is the size of the endowment? \_\_\_\_\_

Number of board members \_\_\_\_\_

How often does the board meet? \_\_\_\_\_

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

If yes, when? \_\_\_\_\_

## 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?
- TCWF's 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. Please refer to TCWF's website ([www.CalWellness.org](http://www.CalWellness.org)) for more information about the Foundation's prioritized health issues.
- 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 after October 2010 and must be completed by December 2011.

If you are selected as a sabbatical honoree, your photograph, background information and responses may be used to develop the public announcement of your award.

## 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);
- Resume that covers, at minimum, the past 10 years;
- Names of three references. Please include name, address, e-mail and relationship to applicant (e.g., co-worker, supervisor, colleague). Please limit the number of elected officials to one;
- 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.

## ELIGIBILITY REQUIREMENTS

Candidates must:

- Be a paid executive director or CEO at a nonprofit health organization. Project directors in larger institutions and directors of programs under a fiscal sponsor arrangement are not eligible for this award.
- Have served in an executive director role (though not necessarily for one organization) for the past six consecutive years or longer.
- 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 activities—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 nonprofit health organizations 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. TCWF does not fund Section 509 (a)(3) Type III non-functionally integrated supporting organizations.
- 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.

To learn more about TCWF's Sabbatical Program Award and its previous honorees, please visit the Leadership Recognition section on our website: [CalWellness.org](http://CalWellness.org)

