Report on Resolution 8:
Sabbatical Leave for Priests and Other Ministry Leaders

Abstract

ECCT staff has quantified the number of individuals that would be affected by the implementation of expanded eligibility and the financial impact of such a policy. These findings have been shared with ECCT’s Mission Council and Bishops in the course of two Mission Council meetings.

- Discussions of these findings identified the need for formalized policies, information systems and financial arrangements should ECCT’s Convention elect to expand sabbatical eligibility to all clergy (excluding supply-only priests) as contemplated in Resolution 8.
- Based on these findings and resulting discussions, the wisdom of extending sabbatical eligibility to ECCT’s lay employee population was questioned in light of qualitative difference between their job requirements and those of clergy members and availability of continuing education and vacation opportunities for lay staff members.

Background

Resolution 8 of ECCT’s 232nd Convention points out the spiritual renewal and self-care benefits of periodic sabbatical leave for bishops and priests, but observed that many full-time and part-time priests, deacons and lay staff have not enjoyed the opportunity for sabbatical leave. Resolution 8 directed the Mission Council and Bishops to propose a plan whereby priests (other than supply priests) can accumulate sabbatical leave time regardless of the number of years served in a particular cure. Resolution 8 further directs the Mission Council and Bishops to establish a task force to develop a plan to provide deacons and lay staff can be offered relevant opportunities for sabbatical leave after five years of service to ECCT. [The full text of Resolution 8 can be found in the Appendix.]

Findings

The Bishops and Mission Council recognize the spiritual, emotional and psychological benefits of clergy sabbaticals, as are usefully enumerated in the full text of the resolution reprinted in the Appendix to this document, and in literature on this topic.
from numerous denominations (see for example http://oga.pcusa.org/section/mid-council-ministries/ministers/rationale-sabbatical-leave/, http://media.focusonthefamily.com/pastoral/pdf/PAS_Sabbaticals.pdf and the brief “Five Reasons Your Pastor Should Take a Sabbatical” which is also in the Appendix to this document).

While accepting this premise, ECCT staff, its Bishops and the Mission Council have focused on understanding the scope of changes suggested by the resolution...

- How many people would be affected?
- What would the financial impact of the expanded access to sabbaticals

...and what processes (information systems, policies and financial arrangements) would be required to extend the benefits of sabbaticals to clergy that are not currently able to avail themselves of sabbatical given the nature of their service.

As to the scope of the changes suggested by the resolution, ECCT’s files indicate that as of this writing there are 96 full-time and 99 part-time Rectors, Priests-in-Charge, Interims, Missional Priests and Assistants serving in ECCT today. Around 30 vocational deacons and just over 20 healthcare chaplains are also serving within ECCT. Parochial Report data indicates that just over 50% of these full-time clerics have been in their present cures for over five years and are already eligible for sabbatical opportunities.

Based on the data we developed, and assumptions about the incremental costs that we might reasonably expect from the implementation of Resolution 8, we have estimated the one-time impact of the implementation of expanded sabbatical eligibility, assuming credit would be given for time already served in the individuals’ current capacities, which would exceed $3,000,000. Assuming credit towards sabbatical eligibility would commence following Convention adoption of the framework set forth in Resolution 8, the on-going annual impact would be roughly one-fifth of the estimated one-time impact, as presented in the table below.
The general assumption behind the estimates for parish clergy is that parishes would need to engage supply clergy working the same number of hours per week in order to establish adequate coverage. We assumed that the actual cost to cover for lay employee sabbaticals be half of the cost if all lay employees availed themselves of a sabbatical every five years. This reduction reflected our expectation that there would be a certain amount of employee turnover prior to reaching 5 year eligibility markers, and by the expectation that some parishes would use volunteers to cover for a paid employee’s absence during a sabbatical.

In Mission Council discussions, the rationale for lay employee sabbaticals was called into question given the population profile of ECCT lay employees (see table below).
and the qualitative differences between the job requirements for clergy and lay employees.

- Almost 90% of lay employees are reported to be part-time employees.
- The nature of the work performed by lay employees in different job categories is quite varied. The rationale for a protracted separation from parish work (apart from normally provided vacation time) was not apparent to all Mission Council members. For example, teachers typically have a two to three month break from parish work every year.
- For several of the employment roles in the table, some parishes currently provide employees with continuing education opportunities for skill development and job enrichment which do not require a three month break from parish work. Other parishes could also adopt this practice.
- Lay employees are not exposed to the same range of emotional and interpersonal pressures that clergy members regularly experience (fewer and less intense pastoral interactions, not “on call” 24X7, etc.)

<table>
<thead>
<tr>
<th></th>
<th>Number of Employees</th>
<th>% Part-Time Employees</th>
<th>Total Annual Compensation [$MM]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Music/Chior Directors</td>
<td>229</td>
<td>92%</td>
<td>$3.57</td>
</tr>
<tr>
<td>Office Staff</td>
<td>195</td>
<td>74%</td>
<td>$4.77</td>
</tr>
<tr>
<td>Teachers</td>
<td>195</td>
<td>93%</td>
<td>$3.81</td>
</tr>
<tr>
<td>Daycare Providers</td>
<td>88</td>
<td>98%</td>
<td>$1.23</td>
</tr>
<tr>
<td>Sextons, Janitors</td>
<td>103</td>
<td>89%</td>
<td>$1.55</td>
</tr>
<tr>
<td>Other*</td>
<td>31</td>
<td>45%</td>
<td>$1.42</td>
</tr>
<tr>
<td>Total</td>
<td>841</td>
<td>87%</td>
<td>$16.35</td>
</tr>
</tbody>
</table>

* Includes Camp, Social Workers, Book Store & Food Service workers

Source: Parish submissions to the 2017 Worker’s Compensation survey
Given these qualitative considerations, Mission Council members questioned the concept of establishing sabbatical eligibility for all lay employees and seek affirmation that this class of employees should be included in future evaluation of expanded sabbatical eligibility.

In addition, there was concern about the financial impact of creating sabbatical eligibility for lay employees, which would translate into roughly a 5% increase in lay employee compensation (covering the cost of a lay employee for 25% of a year once every five years would necessitate the equivalent of a 5% contribution to a sabbatical sinking fund annually). This expense could create significant budget pressure for a number of ECCT parishes.

While the justification for and financial impact of lay employee sabbaticals raised questions among many Mission Council members, the concept of extending sabbatical eligibility for a broader class of clergy members garnered greater support. The Mission Council discussions on this portion of the resolution focused on scope and process for implementation.

As to the scope of sabbatical eligibility, the resolution excludes “supply only” clergy. Other scope-related questions include:

- Should there be some higher threshold for clergy sabbatical entitlement than was stated in the resolution? (One-quarter time? Half-time?)
- How should clergy transferring into ECCT from other dioceses be affected by such a new sabbatical eligibility policy?
- Should retired clergy be affected by an extended sabbatical eligibility policy?
- The resolution does not explicitly mention school and healthcare chaplains. Should this group also be covered in a new sabbatical eligibility framework?

The process for administering a new sabbatical eligibility policy was the subject of much discussion:

- Scenarios in which a priest has accumulated a number of years (say four, for example) of “service credit” towards a sabbatical before leaving one parish to serve at a second should not create the obligation at the second parish to cover the entire cost of the priest’s sabbatical expense after the priest has been at the second parish for just a year.
Logically, the four years of service at the first church should represent 80% of the priest’s eligibility for a sabbatical and the year of service at the second church should 20% of the priests sabbatical compensation.

An 80%/20% sharing of the cost of the priest’s sabbatical would therefore be an equitable way for the two parishes to cover the cost of the priest’s sabbatical. By contrast, other less equitable arrangements will tend to create distortions in clergy and parish incentives with respect to transitions.

It would make sense for the two parishes in this example to contribute proportionately to the compensation of the priest during his/her sabbatical and for the second parish to determine the level of clergy coverage required during the priest’s sabbatical and to be solely responsible to the cost of replacement clergy during that time.

The recurring nature of this financial obligation lends itself to the creation of a series of individual sinking funds (each associated with specific priests) that parishes employing the priest would pay into periodically. No system for tracking sinking fund contribution obligations and actual sinking fund contributions for individual priests currently exists but would be required if the sabbatical eligibility envisioned by Resolution 8 is formally adopted by ECCT.

For a shared responsibility framework as discussed above, there will also need to be a data base to track sabbatical eligibility. None currently exists.

Some framework is needed for addressing circumstances in which clergy change parish assignments and the hours worked per week changes. This circumstance might be addressed by requiring parishes to contribute 5% of the priest’s salary and benefits each quarter, regardless of the hours worked. After 5 years, the clergy member’s compensation from the sinking fund during his/her sabbatical reflects a blend of the compensation arrangements that had been in effect during the prior five years rather than a continuation of the salary arrangements in effect at the cleric’s then-current cure.

If a member of the clergy experiences a significant period of time (to be defined) when he/she is not in a parish and has no other assignment, some policy would need to specify how this lapse of active service would affect the scheduled start date for sabbatical eligibility. A simple rule would be a month delay in timing for sabbatical eligibility for every month in which the priest is without an assignment. However, the rationale for a sabbatical might be called into question if the lapse in service exceeds some threshold (again, to be defined, or to be assessed on a case by case basis by
ECCT’s Bishops working with an appropriate diocesan group such as the Commission on Ministry or possibly the Standing Committee

- ECCT would need to establish a policy to determine parishes’ obligations to continue to contribute to a priest’s sabbatical compensation sinking fund if the priest delays taking a sabbatical once his/her five years of service has been accumulated.
- In addition, ECCT would need to establish a policy for disbursement of unused sabbatical sinking fund balances for clergy who retire or take positions outside of ECCT.
  - Would cash disbursement to the clergy member constitute an incentive not to take sabbatical and consider the sabbatical sinking fund as form of saving?
  - Should contributed funds be returned to the parishes that original made the contributions?
- ECCT will also need to develop a policy for investing sabbatical sinking fund balances to protect the value of contributions against inflation.
- ECCT would need to develop a policy for insuring that parishes comply with whatever policies might be established to address expanded sabbatical eligibility.

Separately from Mission Council discussions, we spoke with Bonnie Matthews of the Deacons Council concerning the issues associated extending sabbatical eligibility to vocational deacons, which touched on many of the eligibility tracking and letter of agreement issues that will need to be addressed for parish priests, particularly as four year assignments are the norm. In addition to existing continuing education budgets, additional aspects of a sabbatical program for vocational deacons might be considered in the future.

**Conclusion and Next Steps**

The Mission Council’s discussions concerning expansion of sabbatical eligibility to full-time and part-time priests serving in parishes for less than five years were generally supportive of this objective.

However, the desirability and appropriateness of offering sabbatical opportunities to ECCT’s lay employees serving five or more years (as opposed to vacation and continuing education opportunities) were questioned during these discussions, given the cost of such a policy for parishes and the largely part-time nature of this employee population. These discussions also pointed out that sabbaticals provide priests a reprieve from the emotional and psychological burdens resulting from their pastoral
responsibilities, and noted that few lay employees have comparable pastoral responsibilities. At a minimum, Mission Council discussions suggest that the proposal to extend sabbatical opportunities to ECCT’s lay employees be reconsidered in light of these considerations and the findings presented above concerning the composition of ECCT’s lay employee population.

For sabbatical eligibility to be extended to full time and part-time clergy serving less than five years in one parish (excluding supply only clergy in keeping with the language of Resolution 8), Mission Council discussions stressed the importance of equitable funding arrangements among parishes served by qualifying clergy members. Conversations focused on a proportional funding obligation for parishes served by priests as they accumulate five years of service time. We identified a process featuring periodic contributions to sabbatical expense sinking funds associated with individual clergy members as one practical and equitable way to manage this process. We also noted the Information management requirements for implementing such a system. We recognized that numerous policies for dealing with a variety of special circumstances (many noted above) will also be needed.

A logical next step would be the estimation of the development and on-going support requirements for implementing an expanded clergy sabbatical eligibility policy. These requirements would include:

- A process for tracking and communicating eligibility status and timing for the priests affected by the extension of sabbatical eligibility
- A process for informing parishes of their sabbatical expense sinking fund contribution obligations,
- A process for receiving, posting, depositing and reporting sinking fund balances
- Resources to provide support and answer questions from parishes and clergy about the process
- A process for disbursing funds to clergy availing themselves of sabbaticals
- Policies and processes for dealing with special circumstances and exceptions

In light of the numerous issues raised by our research and discussions about expanding sabbatical eligibility, we recommend that:

- A workshop on this topic be offered at ECCT’s upcoming Annual Convention
- This document be included in the Reports to Convention
• ECCT’s Mission Council should evaluate the desirability for expanding sabbatical eligibility to ECCT clergy members. If an expansion of sabbatical eligibility for clergy is believed to be desirable, the Mission Council should develop an approach for managing and phasing in expanded sabbatical eligibility.
  o ECCT staff will estimate the development and on-going support requirements outlined above as a potential input to the 2019 Budget of Convention.
  o ECCT staff will document the financial and administrative obligations of parishes in supporting expanded clergy eligibility under the specified approach.
  o These findings should be documented in a formal proposal for Mission Council approval
• ECCT’s Mission Council evaluate the desirability of extending sabbatical eligibility for ECCT’s lay employees.
Appendix

Text of Resolution 8

RESOLVED, that the Episcopal Church in Connecticut, gathered in its 232nd Convention, affirms God’s call to Sabbath as a foundational practice for all baptized persons;

And BE IT FURTHER RESOLVED, that the Convention recognizes that the provision of a sabbatical leave for bishops and priests, which includes a plan for spiritual renewal during that time, has been an important expression of this scriptural mandate and a vital element of self-care throughout the Episcopal Church;

And BE IT FURTHER RESOLVED, that the Convention recognizes that most ministry leaders, especially part-time priests, deacons, and lay staff, have not enjoyed the opportunity for such leaves;

And BE IT FURTHER RESOLVED, that the Convention directs that the Mission Council and Bishops propose a plan through which all priests, other than supply priests, who serve in Eucharistic communities within the ECCT, whether full-time or part-time, and regardless of the number of years served in a particular cure, will accumulate sabbatical leave time which can be used after five cumulative years of service in the ECCT, pending approval of a Sabbatical Plan by an ECCT Bishop;

And BE IT FURTHER RESOLVED, that the Convention directs the Mission Council and Bishops to establish a task force to develop a plan through which deacons and lay staff can also be offered relevant opportunities for sabbatical leaves after five years of service in the ECCT, and report back to the 233rd Convention, in 2017.
“Five Reasons Your Pastor Should Take a Sabbatical” by Thom S. Ranier

1. **A pastor has emotional highs and lows unlike most other vocations.** In the course of a day, a pastor can deal with death, deep spiritual issues, great encouragement, petty criticisms, tragedies, illnesses, and celebrations of birth. The emotional roller coaster is draining. Your pastor needs a break—many times a break with no distractions.

2. **A pastor is on 24-hour call.** Most pastors don’t have an “off” switch. They go to sleep with the knowledge they could be awakened by a phone call at anytime of the day. Vacations are rarely uninterrupted. It can be an exhausting vocation, and a sabbatical can be a welcome time to slow down.

3. **Pastors need time of uninterrupted study.** It doesn’t usually happen in the study at church or home. There is always the crisis or need of the moment. Church members expect sermons that reflect much prayer and study. The pastor’s schedule often works against that ideal. The sabbatical can offer much needed, and uninterrupted, study time.

4. **Pastors who have sabbaticals have longer tenure at churches.** Though my information is anecdotal, I do see the trend. And while I cannot prove a cause-and-effect relationship, I feel confident that pastors who have sabbaticals are much more likely to stay at a church because they are less likely to experience burnout.

5. **Pastors who have sabbaticals view the time off as an affirmation from their churches.** I have heard from many pastors who share with me a sentence similar to this one: “I know my church loves me because they give me a sabbatical.” Pastors need affirmation. Sabbaticals can accomplish that goal.

Source: [http://thomrainer.com/2014/02/five-reasons-your-pastor-should-take-a-sabbatical/](http://thomrainer.com/2014/02/five-reasons-your-pastor-should-take-a-sabbatical/)