



The effect a sabbatical had on employees in a high-tech company
by Jennifer Anne Murphy

A thesis submitted in partial fulfillment of the requirements for the degree of Master of Science in
Business Education

Montana State University

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Abstract:

The major purpose of this study was to determine the effect a sabbatical program had on employees in one high-tech industry. The population chosen for this study was limited to a high-tech company in the computer industry. The sample size was 1,428 employees, representing 100 percent of the population. Each participant had been employed by the company for more than five years and was eligible for the sabbatical benefit. The employees' geographic locations varied among nine U S. field sites, the main headquarters in Silicon Valley, California, and five international sites located in western Europe and the Pacific Rim. The two methods of data collection were focus groups and a survey questionnaire.

The dependent variable, which represented the level of revitalization of an employee after a sabbatical, was subjected to multiple regression analysis with 13 independent variables. The .05 level of significance was used in the multiple regression analysis. A final model of four statistically significant independent variables was developed: (1) job classification, (2) geographic location of employee, (3) the ability of an employee to break away mentally from the work environment, and (4) the amount of time to transition back to the work environment after a sabbatical.

Major findings of the study were: (1) non-exempt employees (paid hourly) had a higher level of revitalization than exempt employees (salaried); (2) international employees had a higher level of revitalization than U S. employees; (3) if employees were able to break away mentally from the work environment, their level of revitalization was higher; and (4) the longer employees took to transition back to the work environment, the higher their level of revitalization.

There were two major conclusions of the study. First, management plays a major role in the sabbatical process. Training managers on the psychological aspects of the sabbatical could improve the employee's experience and the overall sabbatical program. Second, a re-entry program for employees who have been on a sabbatical may assist in their transition back to the work environment. By receiving a briefing on what occurred during their absence, employees could be made to feel part of the organization again.

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**A thesis submitted in partial fulfillment
of the requirements for the degree**

of

Master of Science

in

Business Education

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Bozeman, Montana**

June 1990

***This thesis is dedicated to God.
Thank you for giving me the strength and perseverance
to complete this project.***

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APPROVAL

of a thesis submitted by

Jennifer Anne Murphy

This thesis has been read by each member of the graduate committee and has been found to be satisfactory regarding content, English usage, format, citations, bibliographic style, and consistency, and is ready for submission to the College of Graduate Studies.

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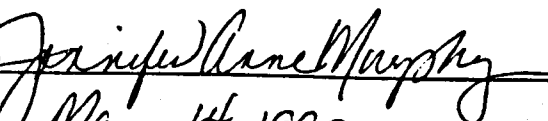
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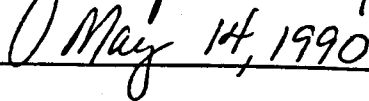
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ABSTRACT

The major purpose of this study was to determine the effect a sabbatical program had on employees in one high-tech industry. The population chosen for this study was limited to a high-tech company in the computer industry. The sample size was 1,428 employees, representing 100 percent of the population. Each participant had been employed by the company for more than five years and was eligible for the sabbatical benefit. The employees' geographic locations varied among nine U.S. field sites, the main headquarters in Silicon Valley, California, and five international sites located in western Europe and the Pacific Rim. The two methods of data collection were focus groups and a survey questionnaire.

The dependent variable, which represented the level of revitalization of an employee after a sabbatical, was subjected to multiple regression analysis with 13 independent variables. The .05 level of significance was used in the multiple regression analysis. A final model of four statistically significant independent variables was developed: (1) job classification, (2) geographic location of employee, (3) the ability of an employee to break away mentally from the work environment, and (4) the amount of time to transition back to the work environment after a sabbatical.

Major findings of the study were: (1) non-exempt employees (paid hourly) had a higher level of revitalization than exempt employees (salaried); (2) international employees had a higher level of revitalization than U.S. employees; (3) if employees were able to break away mentally from the work environment, their level of revitalization was higher; and (4) the longer employees took to transition back to the work environment, the higher their level of revitalization.

There were two major conclusions of the study. First, management plays a major role in the sabbatical process. Training managers on the psychological aspects of the sabbatical could improve the employee's experience and the overall sabbatical program. Second, a re-entry program for employees who have been on a sabbatical may assist in their transition back to the work environment. By receiving a briefing on what occurred during their absence, employees could be made to feel part of the organization again.

CHAPTER 1

INTRODUCTION

In today's high-tech industries, the majority of companies are constantly analyzing their position in industry and determining ways to improve so they are viewed as leaders. The goals of top management are to increase productivity, employee morale, creativity, innovation, and profits so the organization can compete successfully. In these times of fierce competition, a variety of strategies must be implemented and evaluated to ensure that resources are being used to their fullest extent in accomplishing ongoing goals. One relatively new strategy is the employee sabbatical. While this strategy appeals to many workers, few empirical studies have been conducted to evaluate the program's effectiveness in high-tech industries.

A sabbatical in the high-tech industry is defined as a paid or unpaid leave of absence that the employee takes to accomplish a variety of objectives. These objectives might include personal and professional development, community service to increase positive public relations between the company and the community, and giving an employee an opportunity to achieve personal goals. While employees are on sabbatical they have the opportunity to evaluate their goals, plans, objectives, and perhaps address the question,

"What is the meaning of life?" This wasn't always the case when sabbaticals were first introduced in society. Ashby (1979) indicates that the beginning of sabbaticals was defined in Biblical times when a year of rest was observed every seventh year in ancient Judea, allowing the fields and vineyards to lie dormant, without tilling, sowing, pruning, or reaping from autumn to autumn. Eventually, the term sabbatical was broadened to include rest for fields, vineyards, and individuals.

The idea of a sabbatical within the work environment was first adopted by the academic field. Toomey and Connor (1988) state that society generally thinks of sabbaticals as the practice of allowing a college professor time off from teaching every seventh year for rest, travel, writing, or research. The objective for professors taking a sabbatical was to increase their awareness of certain subject matter so they could bring their newfound insight to the students. Today a number of companies outside the academic arena are adopting sabbaticals to expose their employees to a variety of experiences so they can bring back what they have learned and/or experienced to the work environment.

When considering the implementation of a sabbatical program, each company needs to decide whether it will have a structured or unstructured sabbatical program. Tsaklanguanos (1973) explains that there is a difference in management opinion as to what type of sabbatical is the most effective. Advocates for a structured sabbatical program believe that for a more

profitable return to a company, employees should undertake study programs that are related to their jobs. Others believe that complete freedom with the unstructured sabbatical will remove limitations upon a person so as to enable reaching the fullest potential in intellectual and creative capacities. Either program is a viable option, but for a sabbatical to be effective in today's industry, management support is essential. In the early literature on sabbaticals, Blumenthal (1964) states that the entire company must know that top management is behind the sabbatical program in order for it to be effective.

Silicon Valley, located in the San Jose bay area in California, is an area populated by a large number of high-tech companies concerned with staying on the competitive edge. Human resource professionals and management of competing firms are constantly monitoring each other's business strategies, products, and benefit packages. One company that monitors benefit packages in Silicon Valley conducts an annual survey which is completed by approximately 200 companies. The purpose of the survey is to collect data regarding the human resource activities within each company. Survey results suggest that approximately 20 percent of the companies offer some type of sabbatical program. During the summer of 1989, this writer conducted a telephone survey of the companies on the list that had a sabbatical program. The telephone survey findings gave three general characteristics relative to the present standards of sabbaticals in high-tech firms: (1) employees who are eligible for the sabbatical program can be full or part-time, and exempt

(exempt from overtime pay) or non-exempt (paid for overtime); (2) the length of service with the company generally dictates the amount of time off; and (3) the length of service averages from four to seven years with a range of four to eight weeks off with pay.

Need for the Study

Since the sabbatical program is an expensive addition to benefit packages for companies, a study on the effect a sabbatical has on employees within an organization may suggest ways to enhance employees' experiences with the sabbatical program and, in turn, increase the quality and quantity of output from the organization. This study could prove to be informative and beneficial to industry as a whole because evaluation of a new program is always needed.

This study will also be helpful to companies by assessing:

- (1) What are employee reactions to the sabbatical?
- (2) How can the process of sending an employee on a sabbatical be improved?
- (3) How should employees be transitioned back into the work environment after a leave of absence?
- (4) How does this benefit impact the employee's professional career?

Statement of the Problem

The major purpose of this study was to determine the effect a sabbatical program had on employees in one high-tech industry.

The major analysis that was conducted in this study was to evaluate key variables that influence the level of revitalization the employees receive from their sabbatical experience. Using multiple regression analysis, the following null hypotheses were tested:

- (1) Null Hypothesis 1: There is no significant relationship between the level of revitalization employees receive from their sabbatical experiences and their demographic variables (age and gender).
- (2) Null Hypothesis 2: There is no significant relationship between the level of revitalization employees receive from their sabbatical experiences and their employment/job variables (exempt or non-exempt, location, and amount of time transitioning the sabbatical recipient's workload to others in the department prior to the sabbatical).
- (3) Null Hypothesis 3: There is no significant relationship between the level of revitalization employees receive from their sabbatical experiences and their sabbatical variables (length of time on sabbatical, percentage of time spent traveling on sabbatical, and the ability to break away mentally from the work environment).

- (4) Null Hypothesis 4: There is no significant relationship between the level of revitalization employees receive from their sabbatical experiences and their departmental variables (support from the sabbatical recipient's department from management and peers, and whether a designated employee took over the sabbatical recipient's workload).
- (5) Null Hypothesis 5: There is no significant relationship between the level of revitalization employees receive from their sabbatical experiences and their post-sabbatical variables (the job situation upon return, and the amount of time to transition back to the work environment).

Limitations of the Study

The site of this study was a single high-tech firm whose corporate headquarters is located in Silicon Valley. Data were collected from various international and U.S. sites of this firm. Therefore, caution must be exercised when attempting to apply results to other company settings.

Definition of Terms

- (1) Sabbatical: A six-week leave of absence that gives employees an opportunity to take a step back from their job, "recharge batteries," and return to the company with a new perspective and increased enthusiasm. It differs from vacation time in that it is not part of the regular compensation package. Instead, the sabbatical program is intended to be an

incentive for continued service. (The definition for sabbatical was directly obtained from the high-tech company that was used in this study.)

- (2) **Direct Report**: A subordinate who stands in order or rank below another.
- (3) **Exempt**: A term referring to employees who are not required to be paid overtime.
- (4) **Non-exempt**: A term referring to employees who must be paid overtime.
- (5) **Transition**: A passage or movement from one state, condition, or place to another.
- (6) **Revitalization**: To impart new life or vigor; to restore to a vigorous active state.

Chapter 2 will present a literature review of sabbaticals. Following the literature review, the subsequent chapters will discuss the methodology of the study, major findings in the research, recommendations for industry, and recommendations for further research.

CHAPTER 2

REVIEW OF LITERATURE

Introduction

The purpose of this chapter was to review the relevant literature on the concept of sabbaticals. Since the employee sabbatical in high-tech industries is a fairly new idea, there was not a substantial amount of literature available for this particular industry; however, there are basic issues related to sabbatical programs and they are discussed here.

An examination of the literature reveals that the articles written about sabbaticals focus on five major themes and findings: (1) a historical look at sabbaticals, (2) sabbaticals help companies to stay on the competitive edge in their industry, (3) sabbaticals provide career and personal development for the sabbatical recipients and the employees who remain at work, (4) management support is a key to the success of an employee sabbatical program, and (5) business professionals have varying points of view regarding sabbaticals.

Historical Review of Sabbaticals

As stated in the introduction of this paper, the sabbatical was first used in Biblical times. The idea of individual sabbaticals did not surface until the last two decades of the nineteenth century when the academic field decided to initiate opportunities for professors to take leaves of absence. In the 1880s and 1890s, 10 colleges and universities established the first sabbatical leave programs in America while recalling the ancient Hebrew Sabbath and sabbatical year. The first of the 10 colleges was Harvard in 1880. Kimball (1978) captures the purpose of a sabbatical leave for academics in this excerpt by the Committee on Sabbatical Leave at Dartmouth College in 1922:

The purpose of the sabbatical leave is to render the recipient more useful to the college as a researcher, as an investigator, or as an administrator. Leaves of absence are in nowise *[sic]* to be regarded as increased vacation periods, as primarily opportunities for increased financial advantage to the instructor, or as due him upon the ground solely of length of service. They are an investment of college funds designed to increase the efficiency *[sic]* of the teaching force. (p. 371)

Blumenthal (1964) and Tsaklanganos (1973) both state that the academic world accepted the custom of sabbaticals in order for teachers to bring new insight into the classroom. Thus, early pioneers of the theory behind the sabbatical in the work place were academic professionals.

In the early 1960s, union workers in several industries began to demand a more lucrative benefit package in their contracts; hence sabbaticals were

added to the negotiation process. Blumenthal (1964) indicates the widening interest in sabbaticals was greatly spurred by the contracts that David McDonald's United Steelworkers negotiated with the steel industry. The contracts gave production workers a 13-week paid sabbatical for every five years of service.

In the following years of the 1970s, there was not a lot of progress in implementing sabbatical programs in the United States, but there was in Europe. Nollen (1978) reviewed several European countries that implemented paid education leave in one form or another as part of local or national employment and training policy. In the United States there was no national policy on paid educational leave. Even though the Lifetime Learning Act of 1976 provided new authority for government initiatives, it did not increase the number of sabbaticals within industries. Nollen's study found that in 1975, nine percent of all private sector firms in the United States with 500 employees or more authorized one worker or more to take a paid educational leave or sabbatical of a month or longer, but there were scarcely any arrangements whereby all workers were entitled to such leaves.

Eventually sabbaticals became accepted in various industries because of the theory that they were a necessary tool in combating stagnation and lack of productivity in the work force. Macbeth (1978) acknowledges in his article on sabbaticals that large corporations are realizing that in order to stay productive and sane, today's employees need breathing space. Leaves of

absence, whether for social contributions, self-improvement, or political service, are becoming more and more common.

Staying on the Competitive Edge

Being on the competitive edge is very important for companies in any industry, but especially in the high-tech industries. By staying competitive, they improve their chances to survive. Factors that might influence a company's survival and their position versus their competitors' position in industry are major concerns of top management. Some of the factors which contribute to remaining on the competitive edge are creativity, innovation, productivity, high employee morale, and retention of employees in their organization. Sabbaticals are often used as a strategy to increase the above factors to keep a company on the competitive edge.

MacBeth (1978) and Hennefrund (1987) address the idea that sabbatical experiences let individuals see things more creatively and let them move into lateral thinking. An employee returns to the office with new insights and approaches and applies them to old problems in an invigorating way. Hennefrund (1987) explains in detail that "the employees on sabbatical need to put down their burdens for awhile and slip back into a youthful state that will enable refreshing, original ideas to come to them" (p. 66). It is the application of the individual experiences on sabbatical that make it potentially valuable to business. Toomey and Connor (1988) cite a number of studies

that found the motivation and performance levels of engineers increase from the time they enter the company as recent college graduates until they reach their mid-30s. At that time their performance, motivation, and productivity peak. These traits then begin a steady decline that continues until they retire. Organizations often attempt to stop the decline of creativity and new ideas in the company by implementing an employee sabbatical program. If creativity is sustained in the organization there is also the feeling that an increase in productivity will be realized.

High employee morale is another factor that influences a company's competitive edge. Toomey and Connor (1988) believe that one obvious reward that a company will reap from employee sabbaticals is that an employee who has benefitted from one will feel a sense of gratitude expressed in loyalty and commitment to the employer. A break of six weeks to several months can have a positive effect on both the employee and the company. This break from work gives individuals the opportunity to get renewed and recharged and they return to work with greater energy and a more focused sense of purpose. It is assumed that a company with high employee morale and loyalty will have an advantage over its competitors because this generates enthusiasm which can affect production.

If a company has high employee morale, retention of employees can possibly be less of a problem. In today's high-tech environment, many employees change jobs quite frequently. Competition to keep quality

employees is intense and the idea of a "break" from the job every seven or ten years is a seductive one that may be the guarantee required to enable employees to continue to carry a heavy workload and stay with the company (Tsaklanganos, 1973).

In actuality, individual experiences dictate what kind of gain a company may receive by having an employee sabbatical program. Some employees come back with new ideas; others have an increased amount of enthusiasm and loyalty. Bullock (1986) states that the company which has a sabbatical may benefit in two ways. One way is that the employee will come back with renewed commitment which leads to high productivity and high satisfaction; the other is that if the person does not return, the company is spared inevitable direct and indirect costs of a demotivated, frustrated employee. Whatever the employee brings back to the company, it assists in keeping the organization on the competitive edge.

Career and Personal Development

One concept mentioned quite frequently in the literature is the idea that sabbaticals give employees the opportunity for personal and professional development. Developmental opportunities are available for both sabbatical recipients and the employees who remain at work to take over the extra workload. One main objective of sabbaticals is to inspire employees who are taking a sabbatical to return to work highly motivated to move upward in their

career within the organization. Every company that has an employee sabbatical program is making an investment for the future (Toomey and Connor, 1988).

Bullock (1986) believes that individuals are ready to begin a sabbatical when they start to search for the answers to such questions as: What have I done with my life? What are my real values and how are they being reflected? Am I really doing what I want to do? Is there some way to best combine my current desires, values, talents, and aspirations?

In order for individuals to get the most out of their sabbatical experience, personal and professional goals and objectives should be established and pursued. The setting of sabbatical goals may be extremely difficult, but to make the most out of the experience for the individual and the firm, goal setting is highly recommended. Ashby (1979) reinforces this concept by stating that if a sabbatical has no objective, it is pointless. Goals for the sabbatical experience can be related to the questions above.

Vickery (1983) reports that executives who have taken sabbaticals feel that the value of a sabbatical is clear; upon returning to their company after the sabbatical they are much better prepared to do their job. A corporate executive who took a sabbatical reported to Vickery that from a personal standpoint, the sabbatical gave her new ideas for her own career.

But what about the employees who come back to work with new ideas, goals, and objectives, but do not know how to implement them? Ridgeway

(1987) is an advocate of making sure companies have career planning services available to employees so they know how to direct their newfound goals and objectives.

Another avenue for development is the opportunities that are available to the employees who are left behind to carry out the responsibilities of the employee that has gone on sabbatical. If a company strategically handles this so that the other employees receive developmental opportunities, then they are using their resources to the fullest extent. Ridgeway (1987) comments that cross-training provides an opportunity for employees to work in other jobs and evaluate the potential for pursuing alternative positions. It also solves the scheduling problem caused by the employee gone on sabbatical and provides greater depth to the company at key positions. An employee who successfully assumes added duties during a co-worker's absence has the opportunity to advance into that position. Ashby (1979) mentions that sabbaticals at the same time tend to force organizations to promote subordinates to replace the skills of the individual on leave.

Bullock (1986) addresses a problem with cross-training by quoting a manager whose firm has an employee sabbatical program:

It is no picnic for those left behind. Work has to be carried on as smoothly and seamlessly *[sic]* as possible from a client's point of view. So, sabbaticals do create a burden for other employees who must pick up the slack. . . . [However,] it's worth the aggravation, given the overall advantages. (p. 50)

The overall advantages are the career development opportunities for all employees who participate in the sabbatical process. In order for development opportunities to exist, managers need to counsel the sabbatical recipients and the employees who are involved in the cross-training, to establish career and personal goals. If managers take an extra step and counsel their employees, everyone can get the most out of the sabbatical experience. It is also necessary for managers to be aware of the possibility of disharmony between co-workers because of the extra workload.

Causes of Success in the Employee Sabbatical

According to the literature, the key theme for the cause of success in an employee sabbatical program is management support. Souder (1987) explains that if a company has a sabbatical policy, it conveys a message that management is interested in fresh new ideas. By having such a policy, the company telegraphs the message that management supports ideation. But is this enough? A company that has a sabbatical policy may have management that feels they cannot release anyone from the crush of current assignments to work on new ideas. Bullock (1986) reports the fact that organizations make sabbaticals happen. Nothing would happen if an employer did not have a sabbatical policy and support it. Supporting a sabbatical policy means actually encouraging and allowing employees to take a leave of absence. Another support tactic is to communicate company-wide that top

management strongly advocates the employee sabbatical program in order for it to be accepted and desired (Blumenthal, 1964).

Blumenthal (1964) also believes that a company with some strategic thinking can use sabbaticals to its own advantage. It does not need to be a give-away, but a valuable tool in corporate planning. If this idea is accepted by management, the success and positive effect of sabbaticals on individuals and companies will be evident.

Business Professionals' Viewpoints

Business professionals in the high-tech industries have differing viewpoints on the employee sabbatical program. The viewpoints vary on two major dimensions: pro and anti-sabbatical, and a structured versus unstructured sabbatical program. It has been mentioned throughout this chapter that supporters for the leave of absence policy believe it is a valuable tool to increase productivity, creativity, innovation, and employee morale.

Traditionally, opponents of the employee sabbatical program held a myth that employees were indispensable and could not be spared from their jobs (Blumenthal, 1964; Ashby, 1979). Cross-training is a possible solution that is being implemented to solve the problem of indispensability. Other opponents believe the employees would rather have an increase of salary than time off. Blumenthal (1964) and Bullock (1986) report that there is a movement

towards perks, not salary. "People are earning more and more salary and they want time off to spend it" (Blumenthal, 1964, p. 85).

Two authors, in reporting anti-sabbatical sentiments, quote business professionals who strongly disfavor the idea of employee sabbaticals. "The executives' job is to stay home and mind the store, not to run off on a sabbatical" (Vickery, 1983, p. 58). "Academia deals in ideas, business in results and bottom lines. There is no room for 'discovery' at the bottom line" (Bullock, 1986, p. 50).

Another area of opposing viewpoints is the argument behind structured versus unstructured sabbaticals. Proponents of the structured sabbatical believe it is the most profitable for the company. If a company has an employee do community work while on sabbatical, it enhances relations between the company and the public (Ridgeway, 1987). Nollen (1978) claims the U.S. Postal Service believes that direct benefits come by having employees take an educational leave. The theory behind this view is that an education leave assists the employee in bringing new information back to the work environment.

The fundamental argument for an unstructured program is the idea that most creative work occurs by chance. Free choice is mandatory in a sabbatical program so employees are able to receive the highest level of benefit from the experience. "If you remove limitations to growth, then you

can expect qualities of able men to merge in full, and in ways that no one could have foreseen" (Blumenthal, 1964, p. 88).

The problem with the various opinions is that not many studies have been conducted to support the different viewpoints. The opinions of the business professionals tend to relate to their own unique experiences with sabbatical programs.

Summary

The literature on employee sabbaticals and leaves of absence contains these main points: (1) a sabbatical is a valuable tool in increasing creativity, innovation, and productivity which keeps a company on the competitive edge; (2) a sabbatical is also used as a career and personal development opportunity for all employees who are involved with the sabbatical process; (3) management support of the sabbatical program dictates whether or not it is successful; and (4) varying points of view about sabbaticals are held by business professionals, depending upon their own experiences.

Chapter 3 will discuss the methodology of this study. The methodology consists of determining the population and sample size, construction of the survey instrument, and data collection procedures.

CHAPTER 3

METHODS AND PROCEDURES

Introduction

This chapter addresses the researcher's methods of: (1) choosing the population for the study, (2) obtaining sources of data, (3) developing and administering the survey instrument, (4) collecting the data, and (5) determining techniques for analyzing the data.

Population Survey

The population chosen for this study was limited to one high-tech company in the computer industry located in Silicon Valley, San Jose, California. In April 1989, the company approached the researcher and requested that a study be performed on the effect its employee sabbatical program had on the employees in the company. The population chosen consisted of employees who had been employed by the company for more than five years and who were eligible for the sabbatical benefit. The sample size was 1,428 employees, which represents 100 percent of the population. The employees' geographic locations varied among nine U.S. field sites, the

main headquarters in Silicon Valley, and five international sites located in western Europe and the Pacific Rim.

Sources of Data

A tracking system managed by the records department with the Human Resources area of the organization was used to obtain the names of the employees in the United States for the study. The list contained each individual employee name, geographic location, hire data, eligibility date for a sabbatical, and telephone number. The names for the international participants were obtained from the Human Resource representative at each site. The researcher sent a memo to each international location and requested a list of the employees who were eligible for the sabbatical.

Survey Instrument

The researcher conducted interviews with senior management in the Human Resources department of the company during the first week of the study. The objective of the interview process was to discover the major concerns and questions management had regarding the sabbatical program. The review of the literature had an impact on generating topics of discussion with senior management because the researcher wanted management to be aware of the issues raised in the literature regarding employee sabbatical programs.

The two methods of data collection decided upon by the researcher and management in the firm were focus groups and a survey questionnaire. Initially, focus groups were conducted to collect information for the design of the questionnaire and also to determine whether the information obtained from the focus groups correlated with comments from participants in the survey instrument. The focus groups addressed nine questions in a two-hour time frame that related to the sabbatical benefit (Appendix A). Next, a questionnaire was designed because there was a need for an efficient way to collect data from U.S. and international sites. The questionnaire was approved by the researcher's graduate committee and contained 32 questions for the employees to answer (Appendix B).

Administration

The process of choosing the participants for the focus groups was conducted by a temporary employee who did not know anyone in the company. First, the employee arbitrarily selected names from the list. Second, employees were called and requested to participate in one of the focus groups that were scheduled during August 21-31, 1989. If the employee was available to attend one of the days of the focus groups, s/he was scheduled at that time. Employees who could not attend any of the sessions were bypassed and another employee was selected.

After the telephone calls were placed to the employees and a commitment was made to participate in the focus group, a follow-up memo (Appendix C) was sent to remind them of the date and time of the focus group session. The remaining employees who were on the resource list were sent a cover letter (Appendix D) explaining the intent of the study and requesting their participation by filling out the questionnaire. Employees who participated in the focus groups did not fill out a questionnaire.

Eight focus groups were facilitated with six to ten participants in each group. Six of the groups were conducted in the corporate headquarters, one was conducted at a manufacturing site, and the other was facilitated at a distribution site. All of the sites for the focus groups were located in Silicon Valley. The six focus groups at corporate headquarters were held between 10:00 a.m. - 12:00 noon, and the other two groups were scheduled in the afternoon from 1:00 p.m. - 3:00 p.m. A total of 64 employees participated in the focus groups.

Instead of taking notes during the focus group meetings, the researcher audio-taped the conversations so the participants would feel at ease answering the questions and expressing themselves. Main themes that emerged in the focus groups are described in the following chapter in the data analysis section.

The majority of the correspondence in this study was conducted via internal company mail. The questionnaire was also sent to employees who

were located at the international and U.S. field sites via a telephone communication system that operated from computer to computer. The employees had a two-week time frame to respond to the questionnaire and return it. The questionnaires were sent out on Thursday, August 17, 1989, and the deadline to return the questionnaire was Wednesday, August 30, 1989.

A total of 1,364 questionnaires were sent out company-wide. The researcher had expectations of a 50 percent return. The total number of questionnaires returned was 814, representing a 59 percent return; however, some of the questionnaires collected could not be used for the final analysis because they were filled out incorrectly. The total number of questionnaires that were able to be used for the final analysis was 721, representing 53 percent.

Analysis of Data

The dependent variable used in this study was the level of revitalization the employee experienced from the sabbatical experience. The question that measured the level of revitalization was: "Select the category that best describes how you feel regarding the following statement: *After having my sabbatical, I am recharged for another five years at [name of the company].*" The answers to the preceding question were coded from 1 to 4 in the following manner: 4 = strongly agree, 3 = agree, 2 = somewhat agree, and 1 = disagree.

There were 13 independent variables used in this study, segmented into five categories: (1) demographic variables, (2) employment/job variables, (3) department variables, (4) sabbatical variables, and (5) post-sabbatical variables. The codings assigned for the independent variable families are outlined in Table 1.

Table 1. Codings and coding descriptions assigned for independent variable families.

Independent Variable Families	Code	Code Description
<i>Demographic Variables:</i>		
▸ Gender	1	male
	2	female
▸ Age	1	under 20
	2	20 - 29
	3	30 - 39
	4	40 - 49
	5	50 - 59
	6	60 plus
<i>Employment/Job Variables</i>		
▸ Salary	1	exempt
	2	non-exempt
▸ Location	1	U.S. sites
	2	international sites
▸ Amount of time transitioning work load	1	no transition or less than 1 wk.
	2	1 - 2 weeks
	3	3 - 4 weeks
	4	5 plus weeks

Table 1--Continued.

Independent Variable Families	Code	Code Description
<i>Sabbatical Variables:</i>		
▶ Number of weeks on sabbatical	—	Continuous variable
▶ Percent of time spent traveling	1	0 - 19
	2	20 - 39
	3	40 - 59
	4	60 - 79
	5	80 - 100
▶ Ability to break away mentally from the work environment	3	fully
	2	somewhat
	1	never
<i>Department Variables</i>		
▶ Support from management to take a sabbatical	4	very supportive
	3	supportive
	2	somewhat supportive
	1	not at all supportive
▶ Support from peers to take a sabbatical	4	very supportive
	3	supportive
	2	somewhat supportive
	1	not at all supportive
▶ Did a designated employee take over the sabbatical recipient's workload?	1	yes
	2	no
<i>Post-Sabbatical Variables:</i>		
▶ Job situation upon return from sabbatical	1	returned to the same job
	2	took a new position that was arranged prior to leaving on sabbatical
	3	took a new position that was not arranged prior to leaving on sabbatical
▶ The amount of time to transition back to the work environment	1	less than 1 week
	2	1 week
	3	2 weeks
	4	3 weeks
	5	other (fill in number of weeks)
	6	I have not been able to adjust to being back after _____ weeks (fill in number)

The model illustrated in Figure 1 describes each independent variable and illustrates the relationships among all variables.

The data analysis was conducted using the *Statview 512+* software package which is operated on a Macintosh computer. The researcher conducted a multiple regression analysis with an alpha significance of .05 to test the null hypotheses. The purpose of the multiple regression was to evaluate the correlation between the independent variable categories and the dependent variable.

Null Hypotheses

The following null hypotheses were tested:

- (1) Null Hypothesis 1: There is no significant relationship between the level of revitalization employees receive from their sabbatical experiences and their demographic variables (age and gender).
- (2) Null Hypothesis 2: There is no significant relationship between the level of revitalization employees receive from their sabbatical experiences and their employment/job variables (exempt or non-exempt, location, and amount of time transitioning the sabbatical recipient's workload to others in the department prior to the sabbatical).
- (3) Null Hypothesis 3: There is no significant relationship between the level of revitalization employees receive from their sabbatical experiences and their sabbatical variables (length of time on sabbatical, percentage of

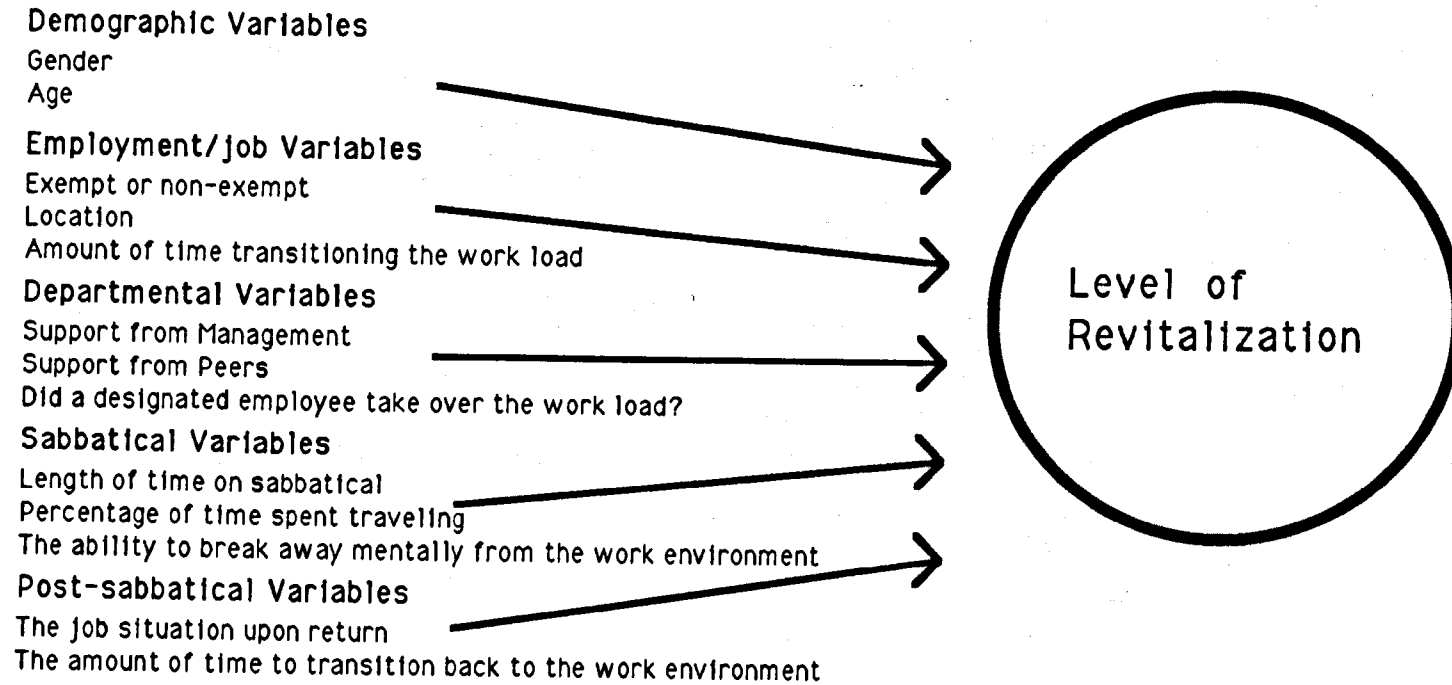


Figure 1. Model of independent variables and the dependent variable.

time spent traveling on sabbatical, and the ability to break away mentally from the work environment).

- (4) Null Hypothesis 4: There is no significant relationship between the level of revitalization employees receive from their sabbatical experiences and their departmental variables (support from the sabbatical recipient's department from management and peers, and whether a designated employee took over the sabbatical recipient's workload).
- (5) Null Hypothesis 5: There is no significant relationship between the level of revitalization employees receive from their sabbatical experiences and their post-sabbatical variables (the job situation upon return and the amount of time to transition back to the work environment).

The following chapter will discuss the results of the survey instrument and major findings from the research. Also, a final model from the multiple regression analysis will be presented.

CHAPTER 4

RESEARCH FINDINGS

Introduction

This chapter addresses the research findings from the focus groups and those surveyed by questionnaire concerning the effect a sabbatical has on employees within a company. First, each hypothesis is stated with a presentation on the overall model. Second, the significant variables from all five hypotheses are combined to make a final model. Next, the focus group questions and their major findings are presented. In conclusion, a summary of the major findings from the research is presented.

Findings from the Questionnaire

Each independent variable category was subjected to multiple regression using a significance level of .05. The mean values and standard deviations of the 13 independent variables can be found in Appendix E. The dependent variable (level of revitalization) and its frequency distribution are displayed in Table 2. Eighty-nine percent of the respondents for the dependent variable question seemed to have achieved some level of revitalization from their

sabbatical experience. Only 11 percent of the respondents felt the sabbatical did not revitalize them.

Table 2. Dependent variable frequency distribution for the statement: "The sabbatical experience renewed and recharged employees for another five years at the company" (n=721).

Code Description	Code	No. Responses
Strongly Agree	4	242
Agree	3	207
Somewhat Agree	2	196
Disagree	1	76

The five models for the hypotheses were significant, but the variance was fairly low, with a range from .012 to .081. The strongest model of the five hypotheses was the employment/job model. The adjusted R^2 was .081 and the p-value was .0001. The following discussion and tables identify the models and the research findings.

Null Hypothesis 1

Null Hypothesis 1 stated, "There is no significant relationship between the level of revitalization employees receive from their sabbatical experiences and their demographic variables (age and gender)."

Table 3 represents the model for the demographic variables in Null Hypothesis 1. The overall model was significant with a p-value of .0008 and an adjusted R^2 of .017. The significant variable in the demographic model

was gender, with a probability of .0031. Gender is a variable that can possibly have an effect on the level of revitalization of an employee's sabbatical experience. Based on the multiple regression and coding of the variables, males had a tendency to have a lower level of revitalization than females on their sabbatical.

Table 3. Multiple regression for Null Hypothesis 1.

Demographic Variables	Regression Coefficient	p-Value
Gender	.229	.0031
Age	-.074	.1215
Overall p-Value = .0008; $R^2 = .02$; Adjusted $R^2 = .017$		

Null Hypothesis 2

Null Hypothesis 2 stated, "There is no significant relationship between the level of revitalization employees receive from their sabbatical experiences and their employment/job variables (exempt or non-exempt, location, and amount of time transitioning the sabbatical recipient's workload to others in the department prior to the sabbatical)."

Table 4 represents the model for employment variables in Null Hypothesis 2. The overall model for this hypothesis reflected the strongest level of significance of the five hypotheses. There was a p-value of .0001 and an adjusted R^2 of .081. The two significant variables in this model were location and job

classification. The p-value for location was .0001 and the p-value for job classification was .0004. If an employee is located outside of the U.S. and non-exempt, the level of revitalization of the sabbatical experience is higher. For the dependent variable question, a mean value of 2.6 was found for exempt employees and a mean value of 3.2 for non-exempt employees.

Table 4. Multiple regression for Null Hypothesis 2.

Employment/Job Variables	Regression Coefficient	p-Value
Location	.423	.0001
Job classification	.356	.0004
Amount of time to transition workload	-.016	.7300
Overall p-Value = .0001; R^2 = .085; Adjusted R^2 = .081		

Null Hypothesis 3

Null Hypothesis 3 stated, "There is no significant relationship between the level of revitalization employees receive from their sabbatical experiences and their sabbatical variables (length of time on sabbatical, percentage of time spent traveling on sabbatical, and the ability to break away mentally from the work environment)."

Table 5 represents the model for sabbatical variables in Null Hypothesis 3. The overall model was significant with a p-value of .0012 and an adjusted R^2 of .018. The significant variable was the ability of the employee to break away mentally from the work environment, with a p-value of .0004.

Employees tended to increase their level of revitalization during their sabbatical experience if they were able to leave work at the office while on sabbatical. Table 5 and the focus group comments explain that if an employee is able to break away mentally from the work environment, then the level of revitalization of the sabbatical experience increases.

Table 5. Multiple regression for Null Hypothesis 3.

Sabbatical Variables	Regression Coefficient	p-Value
Length of sabbatical	-.030	.2107
Percent of traveling	-.058	.0248
Break away mentally	.264	.0004
Overall p-Value = .0012; R^2 = .022; Adjusted R^2 = .018		

Null Hypothesis 4

Null Hypothesis 4 stated, "There is no significant relationship between the level of revitalization employees receive from their sabbatical experiences and their departmental variables (support from the sabbatical recipient's department from management and peers, and whether a designated employee took over the sabbatical recipient's workload)."

Table 6 represents the model for departmental variables in Null Hypothesis 4. The overall model was significant with a p-value of .0109 and an adjusted R^2 of .012; however, it was the weakest of the five hypotheses. The significant variable in this model was "designated employee took over the

sabbatical recipient's workload," with a p-value of .0056. The relationship with the dependent variable was negative. In essence, if another employee took over the sabbatical recipient's workload, there was a tendency for the employee going on sabbatical to have a lower level of revitalization from the sabbatical experience.

Table 6. Multiple regression for Null Hypothesis 4.

Departmental Variables	Regression Coefficient	p-Value
Designated employee took over workload	-.266	.0056
Support from management	.044	.4454
Support from peers	.052	.4256
Overall p-Value = .0109; R^2 = .016; Adjusted R^2 = .012		

Null Hypothesis 5

Null Hypothesis 5 stated, "There is no significant relationship between the level of revitalization employees receive from their sabbatical experiences and their post-sabbatical variables (the job situation upon return, and the amount of time to transition back to the work environment)."

Table 7 represents the model for the post-sabbatical variables in Null Hypothesis 5. The overall model was significant with a p-value of .0001 and an adjusted R^2 of .054. The significant variable in this model was the amount of time it took for the employee to transition back to the work environment. The p-value of this variable was .0001. As the level of revitalization increases

for an employee sabbatical, it takes the employee longer to adjust to being back in the work environment.

Table 7. Multiple regression for Null Hypothesis 5.

Post-Sabbatical Variables	Regression Coefficient	p-Value
Amount of time to transition back	-.198	.0001
Situation after sabbatical	-.002	.9720
Overall p-Value = .0001; $R^2 = .057$; Adjusted $R^2 = .054$		

Summary of Significant Independent Variables

Multiple regression analysis with an alpha significance of .05 was conducted for each of the seven significant independent variables from the five hypotheses. An end result was four significant independent variables for a final model. Table 8 represents the four independent variables that have a significant relationship with the level of revitalization of an employee's sabbatical experience. The overall final model had a p-value of .0001 and an adjusted R^2 of .124. If an employee is located out of the U.S., is non-exempt, has the ability to fully break away mentally from the work environment, and takes time to adjust to being back to the work environment after the sabbatical, s/he tends to have a higher level of revitalization with the sabbatical experience.

Table 8. Final model of significant independent variables.

Significant Independent Variables	Regression Coefficient	p-Value
Location	.384	.0002
Job classification	.280	.0046
Break away mentally from work	.293	.0001
Amount of time to transition back	-.126	.0001
Overall p-Value = .0001; $R^2 = .129$; Adjusted $R^2 = .124$		

Findings from the Focus Groups

Each of the nine questions that were addressed during the focus group sessions is presented in Table 9, along with a listing of relevant major response findings pertaining to each question. The eight focus groups were audio-taped to ensure the discussions were accurately recorded. If a theme was discussed in more than three of the eight focus groups, it was considered a major finding.

Table 9. Questions and major response findings from the focus groups.

Question	Major Response Findings
(1) What do you think about the sabbatical program?	Employees thought 6 weeks was too short. Employees had uncertainty about what to expect when they returned to work. Employees felt the sabbatical was a wonderful and unique experience. Employees stated the sabbatical program helped fight burnout. Employees considered the sabbatical a good time to reevaluate their goals personally and professionally. Employees need help to transition back to the work environment.
(2) What is your impression of this company for having a sabbatical program?	Employees considered the company to be first-class for offering a sabbatical. Participants felt the company valued them as employees. Employees discussed the idea that the company expects a lot and they deserve a sabbatical. Employees considered the sabbatical a nice benefit. By having the sabbatical program, the company is staying competitive in retaining quality employees.
(3) What kind of impact did this program have on you as an employee?	The sabbatical gave employees time to put their lives into perspective. The time off improved employees' personal relationships. The sabbatical was a catalyst in helping employees recognize a need for balance between work and personal life. It is expensive because with 6 weeks of free time, employees tended to spend more money.

Table 9--Continued.

Question	Major Response Findings
(4) What were your concerns in leaving on sabbatical and returning to your job?	Employees were apprehensive about leaving because they might lose their jobs while they were gone. Employees felt preparation was necessary before leaving on their sabbatical.
(5) How was the transition from the work environment to your sabbatical leave?	Employees' workloads increased prior to departure. Employees had difficulty delegating their workload. It was difficult to mentally let go of work once employees left on their sabbatical. Employees were able to break away mentally from the work environment more easily if they physically left the geographic location of the company.
(6) While on sabbatical, did you make any personal and/or professional self-assessments?	Employees realized they shouldn't put off vacation time. Employees came back to work trying to be more flexible. Employees acquired an increased motivation towards achieving goals.
(7) How was the transition back into the work environment from your sabbatical?	Employees wished they had made a career move, instead of coming back to the same job. Delegation of responsibilities had a negative impact in the department. Employees need time to adjust to being back in the work environment. A re-entry program is necessary for employees coming back from the sabbatical.

Table 9--Continued.

Question	Major Response Findings
(8) Were there any developmental opportunities for the employees who took over your workload?	Yes, but employees who took over the workload had increased responsibilities and this had a negative impact. When peers took over the workload there was no opportunity for development.
(9) What are your general recommendations concerning the sabbatical program?	There needs to be better management awareness of the sabbatical process. Employees should be able to work half days the first week back from sabbatical. The company needs to prepare employees about what to expect psychologically from the whole sabbatical process. When employees get back from sabbatical, it would be nice for them to talk to someone regarding their feelings and the whole experience. Also helpful at this time would be a debriefing on what happened while they were gone. There should be a slower transition back into the work environment. Employees would like pre-planning assistance for the sabbatical.

**Summary of Major Findings from Questionnaire
and Focus Groups**

Listed below are the combined major findings from the analysis of the questionnaire responses and the focus groups.

- (1) A non-exempt employee tends to have a higher level of revitalization from the sabbatical experience than an exempt employee.
- (2) U.S. employees tend to have a lower level of revitalization from the sabbatical experience than international employees.
- (3) If employees can fully break away mentally from the work environment, their level of revitalization increases.
- (4) Employees who take longer to transition back to the work environment have a higher level of revitalization from the sabbatical experience.
- (5) Employees need assistance in the transition back to the work environment through a debriefing from a company representative who also is sympathetic to their feelings and overall sabbatical experience.
- (6) Employees feel that improved management support and awareness of the sabbatical process would increase the overall benefits of the program.
- (7) A sabbatical gives employees time to evaluate personal and professional goals and objectives.

Chapter 5 will summarize the overall study, discuss the major findings, and make recommendations for future research.

CHAPTER 5

SUMMARY, CONCLUSIONS AND RECOMMENDATIONS

Introduction

Chapter 5 presents the summary of the study, conclusions based on major findings and the literature, general recommendations, and recommendations for future research.

Summary

The overall purpose of this study was to evaluate the effect a sabbatical had on employees within a high-tech organization. Since sabbaticals are new to high-tech industries, evaluation of the program is of interest to human resource managers. The original concept of the study came from a human resource manager who requested this author's assistance in evaluating the effect of the sabbatical program that is offered at his company.

The population chosen for the study included both U.S. and international employees who were eligible for a sabbatical within the company. The study took place during the summer of 1989 in Silicon Valley, California.

The methods of data collection were focus group sessions and a questionnaire. The focus groups were conducted in the Silicon Valley at the company's main headquarters, at a manufacturing site, and at a distribution site. The questionnaire was sent via inter-company mail to participants at the main headquarters and a computer modem system was used to send the questionnaire to the U.S. field sites and international sites.

The five null hypotheses were subjected to multiple regression at an alpha significance level of .05. All five hypotheses were significant, but at very low variances ranging from .012 to .081. The significant independent variables in each hypothesis were subjected to multiple regression analysis with an alpha significance level of .05, and a final model was developed with a variance of .124. The independent variables that affected the level of revitalization received by the employee from a sabbatical experience were: (1) location of the employee, (2) job classification (i.e., exempt or non-exempt), (3) the amount of time allowed for adjustment back to the work environment after the sabbatical, and (4) the employee's ability to break away mentally from the work environment.

The major findings from the focus groups had two significant themes: (1) employees need some assistance in the transition back to the work environment through a debriefing from a company representative who is sympathetic to their feelings and overall sabbatical experience, and

(2) management support and awareness of the overall sabbatical process would be beneficial to the sabbatical program.

Conclusions

Based on the findings from this study, a number of major conclusions can be made. The first significant conclusion is that international employees had a higher level of revitalization after the sabbatical than U.S. employees. There could possibly be a variety of reasons for this outcome. The majority of international employees who responded to the questionnaire were located in Singapore; this culture may have stronger loyalty and commitment to a company, thereby influencing the international employees to report a higher level of revitalization. Another reason could be that U.S. employees may have difficulty breaking away mentally from the work environment due to the American work ethic, creating a lower level of revitalization. Hennefrund (1987) cites in his article that Americans have more leisure time and money to spend; however, they are so overwhelmed with the work ethic that they develop all sorts of mental barriers that prevent them from enjoying themselves.

Another factor that may contribute to the outcome of international employees having a higher level of revitalization than U.S. employees could be because the majority of exempt employees are located in the United States, and exempt employees also had a lower level of revitalization than

non-exempt employees. (The distribution of the respondents in these two categories is presented in Appendix F.) Exempt employees may have a lower level of revitalization because of the higher level of responsibilities they have in the organization, making it difficult to break away mentally from work while on sabbatical. An extreme example behind this idea is a focus group session that had four out of six participants who were classified as exempt managers prior to the sabbatical and who, upon return, requested a demotion. The managers evaluated their positions within the organization while on sabbatical and decided they did not want the high level of responsibilities.

The second conclusion was that the ability of an employee to break away mentally from the work environment influenced the level of revitalization after a sabbatical. The more successful employees were in fully breaking away mentally from the work environment, the higher level of revitalization they had from their sabbatical experience. A solution that was discussed in the focus groups that seemed to work for individuals was to physically relocate from the geographic location of the company during their sabbatical. For example, if an employee was taking a sabbatical, s/he would get on a plane the next day, and this act assisted in breaking away mentally from work.

A third conclusion was that a slower transition back to the work environment increased the level of revitalization for employees from the sabbatical experience. The focus group findings confirmed this idea. Employees who participated in the focus groups suggested two strategies to retain the level

of revitalization: (1) upon return from the sabbatical, employees should be permitted to work half days for the first week; and (2) on the first day back at work, employees should be briefed on what happened while they were gone by their manager and a human resource representative. The focus group findings also concluded that employees who came back on the first day to meetings and high stress situations felt they had never been gone.

The fourth and final conclusion was that management does tend to play an important role in the sabbatical program. This was confirmed both by the literature (Blumenthal, 1964; Dods, 1980; Souder, 1987) and the focus group findings. However, the findings from the questionnaire indicated that management support was not a significant variable in the level of revitalization from the sabbatical experience. This writer had felt that this variable was going to be an important factor in increasing the level of revitalization, based on the literature and intuitive feelings. However, this did not prove to be true. The questionnaire may not have addressed this issue extensively enough to determine what role managers should have in the sabbatical process to increase the level of revitalization for the employee.

General Recommendations and Recommendations for Research

This study has contributed considerable insight relative to the sabbatical process offered in a high-tech industry. The following recommendations are offered based on the findings of this research:

- (1) Management plays a major role in the sabbatical process. Training managers in the psychological aspects of the sabbatical process could improve the employee's experience and the overall sabbatical program.
- (2) A re-entry program for employees who have been on a leave of absence and/or sabbatical may assist them in their transition back to the work environment. The re-entry program could be informal or formal. If the company decides on an informal program, it should include a briefing from the employee's immediate manager and a human resource representative. A formal re-entry program could consist of a half-day orientation in classroom format. By receiving a briefing on what occurred during their absence, employees could be made to feel part of the organization again.
- (3) Since there have been few empirical studies on the sabbatical program in high-tech industries, various types of research in this area should be conducted to evaluate sabbatical programs. One approach should be to study a general population of employees in a company to discover their overall assessment of the sabbatical benefit. It would be interesting to determine whether or not the sabbatical program is an incentive for employees to remain with a company.
- (4) The literature review did not reveal any longitudinal studies to evaluate employee feelings prior to departure on sabbatical, while on the sabbatical, or upon return. This researcher believes a study of this nature that

involves a follow-up on employees regarding career paths, retention, and outside activities for a balanced lifestyle may provide insightful information for human resource professionals.

- (5) Future studies could be broadened to include more than one company in a high-tech industry. A study could be conducted involving a number of companies in one industry or a variety of companies in various high-tech industries and traditional industries. The present study targeted only one company in a high-tech industry. Studies that involve other companies in various industries could generate more information on the whole sabbatical experience.
- (6) A study to measure whether the sabbatical has an impact on the quality and quantity of productivity might also be conducted. Performance appraisals on employees that have gone on a sabbatical could be evaluated prior to departure on a sabbatical and after the sabbatical experience to discover if there has been an increase in productivity.

The literature suggests that overall a sabbatical is a positive program. This study, however, points out that there are some negative aspects to a sabbatical program. If employees do not achieve some of the objectives that make a sabbatical a positive program, one has to question if it is working. It is possible that companies are losing people after the sabbatical experience. A company may be paying a high price for what it perceives as a good benefit, but actually losing its employees in the long run. This presents

challenges for companies to identify and improve the negative aspects of a sabbatical program.

Human resource professionals and top management have many challenges in the future to retain quality employees, increase creativity and innovation, and maintain high morale in the organization. The sabbatical program is considered a useful tool to attain these objectives. The more empirical studies that are conducted that demonstrate a positive benefit associated with sabbatical programs, the more likely there will be an increase of management support towards implementation of sabbaticals.

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APPENDICES

APPENDIX A
QUESTIONS FOR FOCUS GROUPS

QUESTIONS FOR FOCUS GROUPS

- (1) What do you think about the sabbatical program?
- (2) What is your impression of [company] for having this program?
- (3) What kind of impact did this program have on you as an employee?
- (4) What were your concerns in leaving on sabbatical and returning to your job?
- (5) How was the transition from the work environment to your sabbatical leave?
- (6) While on sabbatical, did you make any personal and professional assessments?
- (7) How was the transition back into the work environment from your sabbatical?
- (8) Were there any developmental opportunities for the employees who took over your workload?
- (9) What are your general recommendations concerning the sabbatical program?

APPENDIX B

RESTART/SABBATICAL RESEARCH

QUESTIONNAIRE

RESTART/SABBATICAL RESEARCH QUESTIONNAIRE

Directions: Please check the appropriate space. The questionnaire should be returned to Jennifer Murphy, M/S 23-J, by Wednesday, August 30.

☐ Male ☐ Female ☐ Exempt ☐ Non-exempt ☐ Grade (fill in number)	Age ☐ Under 20 ☐ 20-29 ☐ 30-39 ☐ 40-49 ☐ 50-59 ☐ 60+
---	---

Location

☐ Cupertino
☐ Fremont
☐ Campbell
☐ Sunnyvale
☐ Other U. S. location/Where? _____
☐ International/Where? _____

Department Name _____ (i.e. Finance, WW Manufacturing, ATG)
 (i.e. U.S. Marketing, Human Resources)

1. Have you taken a sabbatical?

☐ Yes
☐ No

Directions: If you answered YES to the previous question, then proceed to the following questions on pages 1,2, 3, 4, 5, 6, 7, & 8.

If you answered NO to the previous question, then proceed to question #32 on page 8.

2. If yes, what year did you take your sabbatical?

☐ 1985
☐ 1986
☐ 1987
☐ 1988
☐ 1989

3. How many weeks were you gone on your sabbatical? (Include any additional vacation time.)

_____ weeks on sabbatical _____ weeks additional vacation

4. What percentage of your sabbatical was spent traveling?

_____ 0 - 19 %

_____ 20 - 39 %

_____ 40 - 59 %

_____ 60 - 79 %

_____ 80 - 100 %

If you did not travel, why not?

5. Check the category that best describes the support you received from *your manager* to leave on sabbatical?

_____ Very supportive

_____ Supportive

_____ Somewhat supportive

_____ Not at all supportive

6. Check the category that best describes the support you received from *your peers* to leave on sabbatical?

_____ Very supportive

_____ Supportive

_____ Somewhat supportive

_____ Not at all supportive

7. Check the category that best describes the support you received from *your direct reports* to leave on sabbatical?

_____ Very supportive

_____ Supportive

_____ Somewhat supportive

_____ Not at all supportive

8. Please describe briefly what was most helpful to you in regard to the support you received from others. If you feel you did not receive support, why do you think the support was not there?

9. Did (a) designated employee(s) take over your work load while you were gone?

☐ Yes

☐ No

10. Which category best describes the person(s) who took over your workload? You may check more than one category if it is appropriate.

☐ Your manager

☐ Your direct report

☐ Peer in your department

☐ Internal regular employee temporarily transferred to your department

☐ Contractor/Temporary agency employee

☐ Other/ Please explain _____

11. In your opinion, was there a developmental opportunity for the designated employee(s) who took over your workload?

☐ Yes

☐ No

12. Which person(s) from question #10 received the developmental opportunity? You may check more than one category if it is appropriate.

☐ Your manager

☐ Your direct report

☐ Peer in your department

☐ Internal regular employee temporarily transferred to your department

☐ Contractor/Temporary agency employee

☐ Other/ Please explain _____

13. In your opinion, which employee(s) had a positive experience taking over your workload?

☐ Your manager

☐ Your direct report

☐ Peer in your department

☐ Internal regular employee temporarily transferred to your department

☐ Contractor/Temporary agency employee

☐ Other/ Please explain _____

☐ No one

14. In your opinion, which employee(s) had a negative experience taking over your workload?

☐ Your manager
☐ Your direct report
☐ Peer in your department
☐ Internal permanent employee temporarily transferred to your department
☐ Contractor/Temporary agency employee
☐ Other/ Please explain _____

☐ No one

15. Was any recognition given to the employee(s) who took over your workload?

☐ Yes
☐ No

16. If the answer is yes to the previous question, what kind of recognition was given? You may check more than one category.

☐ \$\$ Bonus
☐ Gift bonus
☐ It was mentioned in their review
☐ Other/ Please explain _____

17. How long did it take you to transition your workload to the person(s) who were in charge of your responsibilities while you were on sabbatical?

☐ Less than a week
☐ 1-2 weeks
☐ 3-4 weeks
☐ 5+ weeks

18. Is there anything that would have helped you transition out on your sabbatical?

19. While on sabbatical, which category best describes your ability to be able to mentally break away from the _____ work environment?

_____ I was fully able to break away
_____ I was somewhat able to break away
_____ I was never able to break away

20. If you were able to mentally break away from the _____ work environment, how many days or weeks did it take you? (Fill in the appropriate number).

_____ Days _____ Weeks

21. What do you think was the reason why you *could* or *could not* break away?

22. Which category best describes your job situation after your sabbatical?

_____ returned to the same job
_____ took a new position that was arranged before I left on sabbatical
_____ took a new position that was not arranged before I left on sabbatical

23. If you transferred to another position within the company was it your decision to make the job change?

_____ Yes
_____ No

24. If you did transfer, what was the reason?

25. How long after your sabbatical did you make your job change?

_____ 0-3 mos.
_____ 3-6 mos.
_____ 6-9 mos.
_____ 1 year +

26. When you made the transition back into the work environment how long did it take you to adjust to being back?

_____ Less than 1 week

_____ 1 week

_____ 2 weeks

_____ 3 weeks

_____ Other / Fill in the number of weeks _____

_____ I have not been able to adjust being back after _____ weeks (fill in number)

27. Is there anything that would have helped you transition back into the work environment?

28. What was the biggest impact the sabbatical had on:

(a.) Your job/career: _____

(b.) Your personal life: _____

(c.) Other _____

29. Select the category that best describes how you feel regarding the following statement: "After having my sabbatical, I am recharged for another five years at "

☐ Strongly Agree
☐ Agree
☐ Somewhat Agree
☐ Disagree

Please explain:

30. If the sabbatical was an incentive for you to stay at _____ what year of employment did it become an incentive?

☐ 1
☐ 2
☐ 3
☐ 4
☐ 5

☐ The sabbatical was not an incentive for me to stay at _____

31. Please rank the following ten benefits in order of importance to you. The number one represents the most important and the number ten represents the least important.

☐ 401(k)
☐ Disability
☐ Restart/Sabbatical
☐ Fitness Center/Fitness Reimbursement
☐ Child Care Center/Resource Referral
☐ Employee Assistance Program
☐ Medical/Dental
☐ Life Insurance
☐ Baby Bonus/Adoption Assistance
☐ Vacation/Holidays

Directions: Answer question #32 only if you *have not* gone a sabbatical.

32. What is the reason you have not taken a sabbatical?

- ☐ It is scheduled, I just haven't left yet
- ☐ Not enough \$\$ to go anywhere
- ☐ Spouse could not take the time off
- ☐ Work related project postponed my sabbatical
- ☐ I didn't know what to do with my free time
- ☐ I lost my sabbatical because I did not schedule it during the period of eligibility
- ☐ Other/Please explain _____

Comments:

33. Recommendations for the Restart/Sabbatical Benefit:

APPENDIX C

LETTER TO FOCUS GROUP VOLUNTEERS

August 14, 1989

Dear Employee,

Thank you for volunteering to participate in the sabbatical focus group on **Tuesday, August 22 from 2:00-4:00pm. in the Eddie Bauer room, Building 2.**

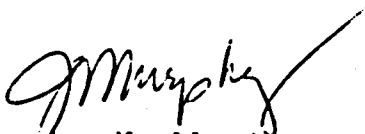
The intention of the sabbatical research project is to evaluate the effectiveness of the sabbatical and to look at possible improvements.

employees worldwide are participating in this research and your participation is a valuable contribution to the study.

During the focus group meeting general attitudes and recommendations regarding the program will be discussed. Refreshments will also be provided.

If you have any questions, please contact me at X46988 or my address is Murphy5.

Sincerely,

A handwritten signature in black ink, appearing to read 'J Murphy', with a long, sweeping horizontal line extending to the right.

Jennifer Murphy
Human Resources

APPENDIX D

QUESTIONNAIRE COVER LETTER

August 17, 1989

Dear Employee,

My name is Jennifer Murphy and I am conducting research in the area of the restart/sabbatical program. The attached questionnaire is very important to the study and I would appreciate it if you would take fifteen minutes of your time to answer the questions.

The reason (company) is doing this study is to evaluate the effectiveness of the sabbatical and to look at possible improvements. (Company) employees worldwide are participating in this research and your participation is a valuable contribution to the study. Please answer all the questions that are applicable to your individual sabbatical experience. If you have taken more than one sabbatical, refer to your most recent sabbatical when answering the questions. The information collected will be put into summary form and the individual answers will be confidential.

On the back of the last page of the questionnaire is my name and mail stop: fold over the questionnaire, staple it, and return it to me at 23-J, Cupertino. If you received this questionnaire by (name), please return it to me at my company address, which is Murphy5. The deadline to return the questionnaire is Wednesday, August 30.

Thank you for your participation.

Sincerely,

A handwritten signature in cursive script, appearing to read "J. Murphy", written in dark ink.

**Jennifer Murphy
Human Resources**

APPENDIX E

**TABLE OF MEAN VALUES AND STANDARD DEVIATIONS
FOR INDEPENDENT VARIABLES**

Table 10. Mean values and standard deviations for independent variables.*

Independent Variables	Mean	Standard Deviation
Gender	1.554	.512
Age	3.054	.810
Exempt or non-exempt	1.266	.442
Location	1.263	.441
Amount of time transitioning the work-load	1.570	.785
Support from management	3.388	.773
Support from peers	3.542	.676
Designated employee took over the workload	1.169	.413
Length of sabbatical (in weeks)	6.873	1.611
Percent travel	2.637	1.477
Ability to break away mentally from the work environment	2.673	.509
Job situation upon return	1.326	.685
Amount of time to transition back to the work environment	2.199	1.210

*Refer to Chapter 3 for coding scales.

APPENDIX F

FREQUENCY DISTRIBUTION OF JOB CLASSIFICATION AND LOCATION VARIABLES

Table 11. Frequency distribution of job classification and location variables.

Employees	Exempt		Non-Exempt		Total (No.)
	No.	%	No.	%	
U.S. employees	474	66	71	10	545
International employees	58	8	118	16	176
Total	532	74	189	26	721

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