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Gimme' A Break: Offering Sabbaticals as an Optional Leave Benefit in the Lodging Industry

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ABSTRACT

The purpose of this study is to investigate the extended leave programs offered by lodging companies in the United States and to suggest a model that could be used in the lodging industry. This model mirrors successful sabbatical leave programs offered by leading companies featured in the annual report, 100 Best Companies to Work For (from this point forward, referred to as 100 Best), published on-line by Fortune Magazine, 2013 (CNN, 2013). While extended leave programs are not entirely lacking in the industry, our research discovered that such leave systems are rare. According to the companies investigated that offer a sabbatical leave program, this benefit offers highly sought after time away from work for top performing employees at the management and higher levels. The benefits reported include happier employees who have increased feelings of company loyalty, job satisfaction, and overall better attitudes. The sponsoring companies stated that those who take part in such leave contribute at a higher level upon their return, bringing fresh ideas and a renewed commitment to the company’s success.

Keywords
vacation, leave time, paid time off, sabbatical, professional development

Cover Page Footnote
Gimme’ A Break: Offering Sabbaticals as an Optional Leave Benefit in the Lodging Industry By Kimberly J. Harris, Ed. D. Professor Dedman School of Hospitality College of Business Florida State University Tallahassee, Florida 32311-2541 850-644-8246 kharris@fsu.edu Gretchen L. Rivera, Ph.D. Institutional Research Analyst Gulf Coast State College Institutional Effectiveness & Strategic Planning 5230 West U.S. Highway 98 Panama City, Florida 32401 850-769-1551 Ext. 2847 grivera@gulfcoast.edu Cydna Bougae, Ph.D. Clinical Assistant Professor Preston Robert Tisch Center for Hospitality, Tourism, and Sports Management New York University 7 East 12th Street #525C New York, New York 10003 212-998-9108 cydna.bougae@nyu.edu

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The benefits of professional leave for management and executive level employees representing a variety of industries have appeared in professional and industry journals for the last three decades; however, detailed models for implementing the various types of leave systems do not readily appear in the published research. Models of leave systems particular to the lodging industry have yet to be studied.

This investigation highlights the current extended leave programs offered by several leading companies in the United States (US) in addition to those offered in the state-supported university systems and private institutions (CNNMoney, 2013). Programs were reviewed to learn of the purpose of extended leave, known in the academic sector as ‘sabbatical’; however, often termed extended Paid-Time-Off (PTO) in private industry. A sabbatical leave option is usually longer in length than a PTO, lasting 30 days or so.

Interest in program implementation, expectations of both employee and employer, to whom the sabbatical is appropriate, and advantages and disadvantages are studied. The goal of the investigation is to offer a model to the lodging industry for management and executive level employees as a professional development benefit. According to study participants, extended leave programs fitting the description of a sabbatical are of great interest, but no literature of a working model for the lodging industry to implement exists.

Leave systems in the hospitality industry at large vary little from company to company and only one lodging company discovered in the research for this article appears to offer leave titled ‘sabbatical’. Interviews with four large luxury hotel executives revealed that extended leave is for the purposes of vacation and unplanned hardship (interviews conducted by Kimberly J. Harris, July 28, 2010). Two weeks of vacation for management with tenure of one year is the norm with up to two weeks of PTO leave for approved purposes. These purposes include health issues, relocation adjustment, and training. The most common leave extended beyond vacation and PTO is for family medical leave (Padgett, Harland, and Moser, 2009). Leave programs in the hospitality industry are reserved for upper-level management. Hourly employees, including those that are in supervisory positions, may or may not be offered vacation time or other options for leave.
Pros and cons of taking time away from the assigned work environment and are consistent in the literature (Conger, 2009; Palade, 2010; McClain, 2005). Additionally, those who have participated in extended professional leave or ‘sabbaticals’, have experienced improvements in personal and professional relationships, appreciation for their careers, and increased self-confidence (Arms, 2010; Sima, 2000; Carr and Tang, 2005, Maslach and Leiter, 1997).

In a study conducted by Hamlin, Ellinger, and Beattie (2008) their professional development research ‘adopts a neo-empirical stance by assuming a critical realist ontology and epistemology falling somewhere between post-positivism and constructivism-interpretivism’ (290). In summary, the work studied includes a practical approach to offering sabbatical leave that involves both the employee and employer in designing an experience of benefit to all included if properly implemented.

**Literature Review**

Sabbatical leave programs are an integral part of several companies voted among the 100 Best, published by Fortune and Money Magazine annually (CNN, 2013). Of those identified, nineteen companies offer sabbatical leave for their employees, including but not limited to SAS, Microsoft, and Alston & Bird. Three lodging companies were named among the 100 Best; however, only one, Kimpton Hotels and Restaurants, offers a program titled ‘sabbatical’ and the remaining two offer vacation and personal development leave time. The sabbatical, vacation, and personal development time off are all considered PTO. The literature reviewed brings to light the pros and cons of extended leave, with most bringing to light the concerns and methods of managing the misconceptions with offering such benefits. We will present evidence that leave is of value; however, also presented is the lack of consistency in modeling with how this leave is designed and interestingly, lack of metrics associated to sabbaticals, making it difficult to measure the return on investment (ROI).

**Defining Sabbatical Leave and PTO**
According to Laurie Steuber (biztimes.com, 2004), the Society of Human Resource Management reports that “two-thirds of US companies offer PTO programs” (1) and employees are seeing a change in the way this time can be used as compared to prior years. While possibly only a week of flex-time, or time that can be taken off for non-descript reasons, the ability to take time off for reasons that are not medical or hardship related is attractive to employees. Paid time off (PTO) is leave that is paid and can be time as brief as an hour to extended time that has a negotiated limit. Regardless, the time is recognized by the employer as a benefit of gainful employment and employees are remunerated according to their pay scale and assigned duties.

To clarify, sabbatical leave as compared to professional development leave, is an important distinction to make as both differ in format as well as expected outcomes. The term ‘sabbatical’ comes from the term ‘Sabbath’ and suggests rest and renewal and is often longer than two weeks but no longer than one calendar year. Traditionally, the Sabbath refers to the seventh day, when Jews and Christians rest, and among the ancient Jews, a sabbatical year occurred every seven years, indicating a time when the fields were to remain unplanted, workers given rest from their labor, and debtors released of their debts (YourDictionary, 2013).
Models of Sabbatical Leave Programs in Education: State and Private Institutions

The term, ‘sabbatical’ is commonplace in the United States (US) educational system, especially in higher education. On a global scale, most institutions accept the term and vision of the sabbatical as described in the US. In the US educational system, faculty senate teams with the support of the provost, develop criteria outlining a guide for those interested in applying for sabbatical leave.

Most post-secondary educational institutions offer the leave to faculty who have achieved both promotion from entry level teaching at the Assistant level to Associate or Full Professor and have achieved tenure, or the acceptance from academic peers at an institution that the faculty member is considered a permanent employee, having passed the probationary period of seven years. Sabbaticals are offered as a benefit to such academic faculty for the purposes of rest, travel, research, and general rejuvenation. Leave can be one semester to two semesters in length for a total of nine months and is most often, competitively awarded. Faculty members must often propose the purpose of the sabbatical and submit a report upon completion, using the leave time for purposes that are both personal and professional is an accepted practice (McClain, 2005; Fogg, 2006). The sabbatical leave systems of both public and private institutions were studied and found to be comparable in design.

Models of Existing Sabbatical Leave Programs in Industry

Models of professional development programs that involve coaching as a teaching and career development paradigm, regardless of industry or educational association, provide opportunities for business executives to be mentored and taught by peer or senior managers to accomplish similar learning objectives offered by sabbatical programs. The companies featured in our literature review offer extended leave programs, often referred to as PTO, Leave Without Pay (LWP), and sabbatical. Of the three lodging companies listed in the 100 Best, to include Marriott International and Four Seasons Hotels and Resorts; however, only one features an extended leave program described as a sabbatical. This company, Kimpton
Hotels and Restaurants, also rates higher than those previously mentioned in the CNNMoney report (CNNMoney.com, 2013; accessed January 4, 2014).

**Alston & Byrd.** During an interview with an executive with Alston-Bird (interviewed by Kimberly J. Harris, October 18, 2010), a law firm specializing in a variety of banking, tax, and other corporate services, offering extended leave for professional development purposes is critical to the success of the company. No monetary impact or the measuring specific metrics are tracked, but the company doesn’t believe it is necessary. Comments from those participating are enough to encourage the company to continue the benefit and enjoy the increased commitment from staff. The support was stated as a “good will expression of trust, the right thing to do, and necessary for employee morale and job satisfaction”.

Leave was offered to create a sense of commitment between both the company and the employees, giving an opportunity to upper level staff to refresh their skills, knowledge and abilities, or simply focus on personal interests. Sabbatical leaves extend opportunities to offer lifelong learning and experiences that contributed to the overall quality of life were cited as key to retaining quality associates. In addition, employees who met the criteria for requesting extended leave were encouraged to take a minimum of one month off and could request as much time beyond this as agreed upon by the company. How the time off was to be used was to be determined by the employee; however, sixty days was the norm.

An expectation of employees participating in sabbaticals included revitalization of self, which in turn, produced a more valuable employee. The requested leave was approved upon proof of coverage for responsibilities assigned. No change in compensation would be experienced and the leave was not considered during evaluation. The statement in leave policy for this company states that associates “are encouraged to do so (take leave) because of its good effects both institutionally and individually”.

**Microsoft.** For yet another named company known for its software development and noted globally as a model for employee satisfaction and retention, Microsoft offers a sabbatical program as one of the many benefits offered to keep turnover low, productivity high, and work-life balance in check. For
extended leave consideration, the employee must have 10 years or more of service and write a proposal to be considered by executive level staff. Furthermore, the employee must have received merit recognition for performance, have seniority within their department, train a replacement to fill their position during the time off, make a commitment to be available during their leave if contact was necessary, and return with a plan for implementing new strategies for overall department improvement or at least, noted weakness within the company that could be overcome by studying competitive systems while on leave.

Leave time at Microsoft can be up to three months with the option of six additional weeks of unpaid leave with a synopsis report due within two weeks of the return of the employee, complete with data and examples of business improvement suggestions. Employees taking such leave were given full pay for the time off as well as the costs of limited room and board if the participant was gathering study data.

The participants are guaranteed job security; however, if it was deemed that the company needed to fill the job with someone else to avoid profitability or other losses, the employee was guaranteed an alternative job at the same pay and rank, if possible. Once leave was taken, the employee could not request another such benefit of leave for seven years unless the company saw a need for more extended research (CNN 2013; HR.com, 2000).

**SAS Institute, Inc.** SAS Institute, Inc., a $1 billion plus company specializing in business analytics and services software development, has regularly appeared among the *100 Best* list of best places to work sixteen consecutive times, earning the number one position in 2010 (currently in second place behind Google). Giving employees flexibility in schedules, time-off, services that include child care, fitness accommodations, and a health care center where services are steps away from the office on the organization’s compound, this company offers a number of benefits that attracts employees above their pay.

Not titled ‘sabbatical’, leave for SAS employees is paid-time-off or leave without pay, depending on the employee and supervisor’s determination. With three weeks of paid vacation upon initial employment and four weeks after ten years of tenure, the company offers additional time off and education
benefits for professional development. Employee-centered benefits are SAS’s secret to record low turnover and employees who consider their employment to be a lifestyle, not a job (Elswick, 2001; SAS, 2013).

**Kimpton Hotels and Restaurants.** Of the companies listed in the 2013 *100 Best*, only one lodging company offers an extended professional leave program referred to as a sabbatical. In an interview with Vice President of People and Culture for Kimpton Hotels and Restaurants, Leslie LaRude (interview by Kimberly J. Harris, July 26, 2013), sabbaticals are an attractive benefit for management level employees for the purpose of refreshing their personal, professional, and emotional lives. Sabbaticals at Kimpton are for the purpose of improving skills, knowledge, and abilities; however, perhaps the most important benefits are more organic to the individual. Ms. LeRude stated that, “It allows people to rest and rejuvenate. It builds a sense of loyalty and appreciation for the brand because they feel valued”. Offered to Hotel and Restaurant GMs, Executive Chefs, Regional Directors, City Managers, Home Office Directors and above, the sabbatical is rotated so that people are given time off at alternate times. Designed to give the deserving executive 30 days of leave, the expectation is to “take time to be completely unplugged and enjoy their time off work”. A report or ‘story’ is expected upon their return to explain all that was experienced and the value the sabbatical for the participating individual.

Interestingly, the requirements to take time off mirror that of the academic world. Kimpton requires that executives that qualifying individuals be with the company at least seven years. If approved by their supervisor, the person’s responsibility is spread over the team in the appropriate department so that the individual is not on call while away. Planning takes place several months in advance. The individual is paid regularly with direct deposit and comes back to the same position at the same rate of pay.

It is important to Kimpton that a sabbatical is not used for personal crisis, which would be a different form of leave. This leave is for the individual to use as they desire and as a form of appreciation from the company, for their talent, hard work, and dedication. When asked if Kimpton followed an established model when designing their program, Ms. LeRude indicated that there was research into several
systems, but ultimately, the decision was to create a custom leave system that met cultural expectations of the company. Metrics, measurement of value-added input verses output, and other analyses are not applied.

Advantages and Disadvantages of Sabbaticals

Advantages. As to the benefits of extended leave, traceable improvements to employee performance and improvements to the bottom line for companies are difficult to measure. Attaching metrics to rejuvenation, rest, time to think, job satisfaction, and improved likelihood that employees are more committed to the organization are noted as benefits of sabbatical leave programs, yet no studies exist that have tracked these subjective variables (Haskins, 2011). While vacation time and family medical leave time are considered benefits that attract and retain employees, benefits are often more subjective and have few tethered expectations. For the companies studied for this investigation, the advantages can be listed as:

- Time to rest
- Time to re-think organization policies, rules, and procedures
- Time to develop new and improved approaches to management, production processes, and company goal accomplishment
- Time to train, gain new skills, learn new approaches
- Time to spend with family
- Time to travel
- Time to return to school
- Time to devote to self
- Improves job satisfaction
- Increases commitment to organization
- Enhances overall positive feelings, attitudes, and personal growth

Sabbaticals are used to attract employees and encourage rest and relaxation with few, if any guidelines. As a strategy to reduce burnout, the advantages outweigh the disadvantages, although no model is used to justify such leave (Simpson, 1997). Programs offered such as Your Sabbatical’s Comprehensive Program Toolkit (Pagano, Pagano, and Southerland, 2010), promises an assessment tool, complete with metrics and tracking system to conduct the ROI of such benefits.
Disadvantages. Taking extensive leaves of absence, regardless of the agreement, present several drawbacks. Halcrow (1989) communicated that leave programs may present several potential problems in the work environment and for employees; hampering the desire to take sabbatical leave even though the benefit is attractive. Ellinger, Ellinger, and Keller (2003) and Gray and Goregaokar (2007) reported that displacement and replacement causes undue hardship unless sabbatical leave offered to those who qualify can be rotated and planned so that only a few employees are on leave at any given time. The disadvantages are listed as:

- Fear of negative peer perception
- Reassignment of duties to others, creating a strain on their workload
- Fear of losing a position or opportunity within the organization
- Fear of changes that take place in the organization while on leave
- Expense of housing, transportation, and supplies needed
- Fear of reduced income
- Fear that loss of talent would reduce the quality of customer service and productivity

For some, there is added stress while being away from work for long periods of time as opposed to taking shorter time periods away, such as long weekends or a week at the most. According to Simpson (1997), employees often feel as if they are ‘indispensable’ (1) and believe their absence has the potential to interrupt customer service, interfere with client relationships, cause reductions in billable hours, and cause a bottleneck to work flow due to the absence of talent.

While technology such as email, cell phones, and SKYPE alleviates many of the concerns, time off wherein the employee is entirely ‘unplugged’, may not be possible. Replacement personnel to cover the responsibilities of the person on leave and the downtime-plus-training required for the person assuming responsibilities of those absent effects the ROI of the position (McCauley and Hezlett, 2001). Simpson (1997) explains that the while employees like the idea of taking long periods of time away from work, Hewitt Associates, LLC believes the programs are lax in determining productivity measurement. The bottom line is not determinable due to the subjectivity and individual response to such benefit.
Lastly, leave time can create such a void that those leaving may be less desirable for the position upon return. This displacement is considered a threat among the Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis a company conducts as to value of an employee support program (Rigg, Stewart, and Trehan, 2007). Employees must understand that taking leave may mean returning to a change in the way work is conducted, responsibilities, and a ‘catch up time’ that deems the leave unreasonable (Lawton-Smith and Cox, 2007; About.com, 2013).

Theory

The value of leave systems, whether short or long; educational, professional or personal, date back to the late 1950’s. Programs unique to emerging economies demanded continual change; consequently, changes in management styles to consider the quality of life, women in the workforce, and improved benefits were demanded (Graham and Weinter, 1996). While dated, the familiar Frederick Taylor’s *Theory of Scientific Management*, one of the first theories of human performance and motivation, theorized that performance was based on piece-meal assignment and monetary reward. This approach analyzed employee value based on the design of the logistics of the work environment and their ability to produce within a specific time (circa 1880). Employees of later, emerging economies wanted to be treated with dignity and respect as important to the success of the organization. Of this later era, expectations for employers to provide fair wages in addition to improved work conditions, training, and safety in the workplace in addition to benefits such as vacation time, continued education, family leave, retirement programs, and health insurance was demanded (Roberts, 2008; Toomey and Connor, 1988; Hamlin, Ellinger, & Beattie, 2008).

**Conceptual Foundations: How High Performance Work Systems (HPWS) Influence Organizational Outcomes**

Ramsay, Scholorios, and Harley (2000) mention the motivators for high performance work systems and motivators that are most likely to stimulate high-commitment or high-involvement employees.
Approaches to measure the return on the investment of a myriad of systems seem to present limitations associated with subjectivity and the inconsistencies of humankind that make success, overall measurement of impact, and value to the organization difficult to analyze. Employees at the executive level tend to be high performance, high commitment, and highly involved in the mission of the company employing them; therefore, benefits such as sabbatical leave may indeed be an outlet for such employees to continue their education, use such leave time to take advanced educational classes or training, or use the time to rejuvenate.

Several systems and analyses are discussed in the literature (Boxall and Macky, 2009; Ramsey et al., 2000; Whitener, 2001, ALDamoe, Yazam and Ahmid, 2012); however, a statement by Ramsay et al. (2000) sums the findings in each of the studies most succinctly in stating that there is a “consensus among those researchers who have reported a link between High Performance Work Systems (HPWS) and organizational performance measures that the associations reflect a causal link which flows from practices through people to performance. Explanations of how and why this link should work rely on theories of employee motivation in response to the types of practice described by HPWS theory and have become so embedded, especially in US management research, as to be taken largely for granted.” (503). The authors communicate that the effort to apply a complicated ROI system or strategy to understand and intricately track a leave system to a value metric is over doing the very simple fact that offering flexibility and leave benefits can be ‘taken at face value, as employee-centered and empowering. Employees, in turn, find that their needs are met by the opportunities and benefits these practices provide, and respond by taking initiatives without instruction and showing loyalty and enthusiasm for their employer.’ (503).

There is value in applying a model to understand the behaviors of high-commitment and high-involvement employees, for which sabbaticals seem to be most effective. Most HPWS models involve a labor process critique as well as surveys using such systems as WERS98 (example available at docstoc.com, accessed Jan. 4, 2014), gathered from employers and employees that permit them to rank or otherwise express their attitudes and satisfaction level with regard to their title, task assignments, need for
Behavioral Theories: Job Satisfaction, Employee Performance, and Burnout

In a dissertation written by Herbert C. Roberts (2008), titled Knowledge Area Module Number 2: Principles of Human Development: Root Causes Behind Employee Burnout and Diminished Job Satisfaction and Motivation, this Ph.D. student specializing in Engineering Management detailed the theories and applications of Abraham Maslow, Frederick Herzberg, David McClelland, and Victor Vroom. The psychological consideration for why people work and what motivates them to perform became the focus of human resources researchers.

Roberts (2008) studied the theories that attempted to explain the motivation of employees to be attracted, attach, flourish, and reach heights in their skills, knowledge and abilities within the workplace. Explanations as to why employees become frustrated, burned-out, over-qualified, and unhappy with their jobs are presented in the theories. Suggestions in each model exist for managing each of these phenomena, including the conclusion that some employees separate from their organization when no plan exists to motivate them to stay.

Theorists popular during the 1950’s and 1960’s offer explanations for the employee who works in an environment where human needs are considered. Abraham Maslow (1943 and 1970), possibly the most recognized among behavioral theorists, developed a model titled, Hierarchy of Needs, explaining the differing levels of amenities that an organization provides and the integration an employee needs to make in order to be motivated to perform. Frederick Herzberg’s Two Factor Theory, also known as Motivation and Hygiene Theory (Two-Factor), is an extension of Maslow’s theory. He further hypothesized that employees are motivated in different ways to achieve performance. Both theories are explained below as well as where, in the application of the theory, extended leave programs fit in each model. Roberts (2008)
gives an exhaustive summary of behavioral theories, comparing each and deducting to a conclusion that employees have needs that must be met in order for them to commit to a company as well as a long term career (Ozgur 2012; Whatishumanresource, 2013).

Abraham Maslow. Abraham Maslow, behavioral theorist who studied individual needs of employees as interacting in the work environment, focused on the issues of job satisfaction, commitment to the organization, and the value of professional development.

The specific levels of Maslow’s Hierarchy of Needs has the five following levels of personal and professional development:

1. Physiological Needs- need for life’s basics such as food, clothing, shelter; enough income to take care of basic needs
2. Safety Needs-Need to feel safe and secure; vesting on a job, tenure, and a determined purpose/title in the workplace
3. Social Needs-Need for attachment, love, feeling of commitment; being part of a work group, team, or department as an individual who contributes to team goals
4. Esteem Needs-Need to feel worthy and respected; need for acknowledgement on the job, job promotions, job responsibilities, award systems; need for advancement of knowledge, experience, and respect for what has been accomplished
5. Self-Actualization Needs-Need to feel fulfilled; need for freedom in the work environment; need to share ideas, need to earn money and flexibility due to time in the job and seniority

Sabbaticals, or extended leave programs, are communicated in Maslow’s Hierarchy of Needs at the Esteem level and contribute to the movement toward Self-Actualization. In this theory, sabbaticals are rewards, leave that is earned by tenured professors; for industry, the leave is reserved for upper level management. For educators, this type of leave is often a part of an organized assignment attached to expectation of report; therefore, for it to be of benefit for both the employee and the employer, the expected outcomes would include increased research or development of new research streams, courses, and a rejuvenation toward teaching. For those in industry, working in a new environment, studying the way business is conducted by competing organizations, returning to school or simply taking the time to rest are all activities expected to contribute to the sharing of innovations learned or developed while on leave.
Frederick Herzberg. Frederick Herzberg, behavioral theorist who studied Maslow, introduced another aspect of employee development by identifying those employed as committed to their jobs for specific reasons. His theory is called *Motivation and Hygiene Theory or Two Factor Theory* (1959). He labeled each factor, associated with job satisfaction or dissatisfaction, as intrinsic- and extrinsically-oriented, to describe a committed employee who was not satisfied with mundane or unchallenging work. According to Herzberg, there are different stimuli that motivate an employee, some are internal to individuals and are motivated to do well, achieve, and contribute due to their belief system. There are activities or conditions in a work environment that can have an opposing, negative effect on whether an employee is being given opportunities to do what they believe is best for them, best of the company, and positive for the overall success of their job or the company in general.

Herzberg identified motivators to include challenging work, recognition for accomplishments and promotions. Personal growth through job rotation, training, job enlargement, or professional development opportunities lead to a more satisfied employee. Conversely, hygiene factors included basics of the job that contributed to job satisfaction, but if not given fairly or associated with the value of the employee, could have a negative effect for the employee. Hygiene factors that must be viewed as appropriate by the employee include salary, benefits, work environment, and job title. According to the theory, the basics, considered hygiene factors must be present before an employee can advance or be stimulated to perform above and beyond basic task assignment. This would leave to the motivators, which result in higher levels of job satisfaction and commitment to the organization.

Sabbaticals fit into Herzberg’s model at the Motivator segment. Hygiene factors have been met if the employee is awarded sabbatical leave. To move to the higher levels of motivation wherein the employee seeks job fulfillment and satisfaction, the reward of leave must stimulate achievement, personal growth, recognition of time rewarded because of seniority, and the responsibility to return to work to share new ideas, develop or improve areas of business, and to rejuvenate the passion to succeed. Graphics of Abraham
Maslow’s Hierarchy of Needs and Frederick Herzberg’s Two Factor Theory appears below (whatishumanresource.com, 2013).

![Maslow's Hierarchy of Needs and Herzberg's Two Factor Theory](http://whatishumanresource.com)

**Research Design**

This study includes both a qualitative and quantitative research approach and is pilot in format. The lack of a model or offerings of sabbaticals in the lodging industry required the development of a survey with no comparative study to follow. The qualitative portion involved interviews with managers of varying industries, including the lodging industry to develop a pilot instrument and based on their feedback to lend quantitative data. The sample included CEOs, GMs, and DHR and TMs of leading hotel firms such as Ritz-Carlton, Marriott, Hyatt, and Omni Hotels to name a few.
The hotels firms were selected from the AAA Diamond-rated hotels and Forbes Travel Guide star-rated hotels as well as independent operators such as Biltmore Hotel, The Greenbriar, The Homestead (managed by ClubCorp, Inc.). Attendance of CEO’s, GM’s, and DHR’s and Training managers attending a conference at a public university in the Southeastern United States were also surveyed.

A survey in two forms, both electronic and hard-copy, was sent to 50 leading lodging companies, requesting input from management- and executive-level employees. A response from 25 companies was received (50%) in a mixture of web responses and hardcopy, which was traditionally mailed. Feedback indicated that the survey needed redesigning; however, the responses to questions proved useful.

A redesign of the survey was done to include rank-order responses. The improved survey was reviewed and edited by a blind-review process of researchers and two hotel executives not part of the original responder list. Focus group interviews were also conducted by GMs of leading hotel companies and their HRDs and TMs. The information gathered from the first mailing of the survey and the FGIs significantly changed the format and questions asked on the initial survey.

Changes included an improved explanation of the study and items to assist in the completion of the instrument. A cover letter, business card, and a small token of appreciation were included. This packet was personally distributed to lodging executives attending a leadership conference held at Florida State University, with a personal request to the group to participate. The lodging experts, again consisting of GMs and HRDs, or Training Managers took the survey home and were encouraged to take their time in completing it. Several returned it before leaving the seminar and others returned it using a postage-paid envelope.

The survey was mailed a third time to general managers of luxury hotels who were not in attendance to the leadership conference. The GMs of properties were contacted in advance and were asked to distribute the survey to their upper level managers. Postage paid envelopes were provided and direction sheet for completing the survey.
The Survey

The survey consisted of open-ended and rank-order questions, using a Likert scale of 1-7 levels of agreement to statements. The instrument was divided into three parts and fourteen variables. The questionnaire employed a 7-point Likert-type scale, rating from 1= strongly disagree to 7= strongly agree, where 4 will represent uncertainty about the question been asked. The first part of the study asked respondents to rank their attitude toward offering a sabbatical leave program. The second part of the survey investigated the respondents’ job profile characteristics including position, number of year in the current position, type of property, annual budget for properties they currently managed, vacation and annual income. The third and last part of the questionnaire was designed to gather the type of support they believed was necessary to develop and implement a sabbatical leave program should one be offered by their organization.

A reliability analysis was performed to the reliability and internal consistency of each attribute measured. According to Nunnally (1978) a minimum value of 0.5 is an indication of reliability. The Cronbach’s coefficient was .706. Therefore the reliability for the variables in the questionnaire was established.

Data Collection and Analysis

The study was accomplished as an exploratory study and used a self-administrated method. The survey was conducted using a convenience sampling method. Those who completed the survey were of the executive level status or the General Manager, Director of Human Resources, Manager of Human Resources, or other management level.

A total of 50 questionnaires were distributed and 25 valid questionnaires were returned for a 50% return rate. The reliability analysis was used establishing acceptable reliability for the items in the
questionnaire. The demographic information was summarized by frequencies. ANOVA and t-tests were performed to assess the relationship between respondents’ demographics and their duty characteristics.

**Results**

The respondents’ characteristics and descriptive statistics on the perception of the participants toward a sabbatical leave program based on the Likert scale are presented in Table 1 and 2. Then t-tests and ANOVAs were applied to test if the perceptions to the sabbatical program changed by a particular characteristic of the participants. The characteristics tested were type of property, position and the number of employees under their management. In our results no statistically significant differences were found in any of these perceptions by any of these characteristics. This indicates that those participating are in agreement about the implementation, concerns, and overall value of sabbaticals in the lodging industry. A follow-up study to include additional companies and upper management and executives would be necessary to make more robust assumptions; however, the pre-test serves as a possible indicator of what to expect from an expanded study.

Results of the pilot test summarizing demographics are presented in Table 1. This table indicates that 56% of the respondents worked at resort properties and 44% worked for hotel companies. Thirty six percent of participants’ held management positions in sales-related jobs and 28% worked in HR-related management positions. Over 70% of participants have held their current position for 1 to 9 years. Forty percent of respondents have been working three years or less in their current position. Over half of the participants’ annual income is between $40,000 and $70,000.

Forty eight percent of participants supervised two to fifty employees and 48% of the participants have budgets of $200 million. Only 8% of respondents supervised over five hundred employees. The majority of respondents had an annual vacation time of more than three weeks.
## Table 1  Respondents’ Characteristics

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>N</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Type of property:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hotel</td>
<td>11</td>
<td>44</td>
</tr>
<tr>
<td>Resort</td>
<td>14</td>
<td>56</td>
</tr>
<tr>
<td>Position:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CEO or assistant</td>
<td>3</td>
<td>12</td>
</tr>
<tr>
<td>HR related</td>
<td>7</td>
<td>28</td>
</tr>
<tr>
<td>Sales related</td>
<td>9</td>
<td>36</td>
</tr>
<tr>
<td>Supporting business</td>
<td>6</td>
<td>24</td>
</tr>
<tr>
<td>Period of working year in current position:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>≤ 3</td>
<td>10</td>
<td>40</td>
</tr>
<tr>
<td>4-6</td>
<td>5</td>
<td>20</td>
</tr>
<tr>
<td>7-9</td>
<td>3</td>
<td>12</td>
</tr>
<tr>
<td>10-12</td>
<td>2</td>
<td>8</td>
</tr>
<tr>
<td>13 ≤</td>
<td>5</td>
<td>20</td>
</tr>
<tr>
<td><strong>Annual income (unit: thousand):</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>40</td>
<td>4</td>
<td>16</td>
</tr>
<tr>
<td>45</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>50</td>
<td>2</td>
<td>8</td>
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<tr>
<td>55</td>
<td>3</td>
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<tr>
<td>60</td>
<td>2</td>
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<tr>
<td>70</td>
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<td>16</td>
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<td>4</td>
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<td>80</td>
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<td>110</td>
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<td>4</td>
</tr>
<tr>
<td>120</td>
<td>2</td>
<td>8</td>
</tr>
<tr>
<td>210</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>250</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>No answer</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td><strong>Supervised No. of employee:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>By myself or with assistant</td>
<td>3</td>
<td>12</td>
</tr>
<tr>
<td>2 – 50</td>
<td>12</td>
<td>48</td>
</tr>
<tr>
<td>51-100</td>
<td>3</td>
<td>12</td>
</tr>
<tr>
<td>101 -150</td>
<td>3</td>
<td>12</td>
</tr>
<tr>
<td>101 -500</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>501 ≤</td>
<td>2</td>
<td>8</td>
</tr>
<tr>
<td>No answer</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td><strong>Annual budget (unit: million):</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.3</td>
<td>3</td>
<td>12</td>
</tr>
<tr>
<td>11.0</td>
<td>2</td>
<td>8</td>
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<tr>
<td>11.5</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>23.0</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>53.0</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>60.0</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>65.0</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>72.0</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>78.0</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>200.0</td>
<td>12</td>
<td>48</td>
</tr>
<tr>
<td>No answer</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td><strong>Annual vacation period (unit: days):</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>15 – 21</td>
<td>3</td>
<td>12</td>
</tr>
<tr>
<td>22 – 28</td>
<td>9</td>
<td>36</td>
</tr>
<tr>
<td>29 ≤</td>
<td>11</td>
<td>44</td>
</tr>
<tr>
<td>No answer</td>
<td>1</td>
<td>4</td>
</tr>
</tbody>
</table>

Note. N = number of observations. % = percentage.

### Average Elements of Sabbatical Leave Programs
Table 2 presents the mean, or average, elements of sabbatical leave programs. To understand the perception of sabbatical leave program, we tested the questionnaire that categorized the expectations of leave programs, barriers of a sabbatical program, and behavioral intention of implementing a sabbatical program. A seven point Likert scale was used based on an agreement scale of agreement of 1=Strongly Disagree, 2=Disagree, 3=Somewhat Disagree, 4=Neither Disagree nor Agree, 5=Somewhat Agree, 6=Agree, and 7=Strongly Agree.

**Expected Effect of Sabbatical Leave Program: What Respondents Expect**

On the category of ‘expectations of the program’, respondents answered that they would expect to see a decrease in work-related burn-out (5.60), while they gave the lowest score on the expected growth of the organization (4.20). They also think that it will increase the morale of the employee (5.44), enhance the opportunity for participants to advance in the company (4.88), and, improve and enhance the knowledge of the organization (4.68 and 4.56, respectively).

When we tested the expected effects of the sabbatical leave programs on two types of property organizations (hotel and resort). In each effect the respondents from the hotel industry thought more favorably about the sabbatical leave program than those from the resort industry; however, these differences were not statistically significant.

**Attitudes Toward Barriers of Offering Sabbatical Leave in the Lodging Industry**

With regard to the category of ‘barriers of the program’, the respondents answered that the biggest barrier is that they don’t know if sabbatical leave programs are appropriate for the lodging industry (4.00). In addition, they somewhat disagree with being too costly for the employer (3.60) and that it does not have practical used for industry (3.36).
We sought to discover the barriers to offering sabbatical leave programs in the lodging industry by type of property. It appears that hotel respondents do not think that it would be too costly for the employer. As for respondents who manage resorts, they are uncertain about cost as a barrier. In addition, it seems that resort respondents find that this program has an implementation in this industry while the hotel respondents find this uncertain. However, in both cases these differences were not statistically significant.

Behavioral Intentions of Sabbatical Leave Program

For the third category of ‘Support’, respondents would like to support their employees and offer a sabbatical program but had no suggestions as to a model or approaches to implementation. They would likely want to adopt this program if a good model is presented to them (5.32). Also, they would like to participate in the program (5.00), they believe that is practical for managers (4.72), it will be well received by their managers (4.28) and they believe that the managers would not take advantage of this program (3.80).

We compared all the behavioral intentions of the participants by their position and found that there were no significant differences among them. However, it was observed that the CEO or assistants (5.67), Sales related (5.67) and Supporting part (4.67) were more willing to participate in the program than HR related personnel (4.14). They were also more supportive of the program (CEO: 5.67, Sales: 5.89 and Supporting: 5.33) than the HR related respondents (4.42). Not the least, HR respondents rated the highest when asked if it would be well received by their managers (4.71) where others ranged from 4.67 to 3.83. Finally, when asked if the GM is more likely to take advantage of the program the responses varied, HR (3.14) and Sales (3.67) disagreed with the statement where CEO or assistant (4.33) and Supportive part (4.50) agreed with the statement.

When comparing the category of behavior intention on sabbatical leave program by type of property it was found that none of these differences were statistically significant. On average, participants
who work in both of these types of lodging industries had positive thoughts about this program. However, participants from the hotel industry were slightly more in favor to this program than those who work in the resort industry.

The result of the behavioral intention category of sabbatical leave programs by number of supervised employees produced no statistically significant differences. However, it was interesting to find that participants who supervised between 51-100 employees (6.33) were more supportive of the program than those who work by themselves (5.00), manage from 2 to 50 employees (5.40), manage more than 101 employees (5.00) or those who did not answer the question (5.40). We saw this same behavior when asked if it will be well received by the manager; where 51-100 (6.33), themselves (3.90), 2-50 (4.00), more than 101 (4.50) and no answer (4.00). In this final question it can also be seen that those who manage between 51 to more than 101 employees think that this program would be well received by the manager where the other categories are uncertain about this or somehow disagree with the statement. In addition, the participants are uncertain or somewhat disagreed of the GM taking advantage of the program.
Table 2

Mean of Each Category Regarding Response to Sabbatical Leave Program

<table>
<thead>
<tr>
<th>Perception</th>
<th>M</th>
<th>SD</th>
<th>Min</th>
<th>Max</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expectations of the program:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Improving knowledge</td>
<td>4.68</td>
<td>1.651</td>
<td>2</td>
<td>7</td>
</tr>
<tr>
<td>Enhancing knowledge base of the organization</td>
<td>4.56</td>
<td>1.529</td>
<td>2</td>
<td>7</td>
</tr>
<tr>
<td>Enhancing the opportunity for advancement of participating employees</td>
<td>4.84</td>
<td>1.462</td>
<td>2</td>
<td>7</td>
</tr>
<tr>
<td>Important for the growth of the organization</td>
<td>4.20</td>
<td>1.683</td>
<td>1</td>
<td>7</td>
</tr>
<tr>
<td>Increasing the morale of employee</td>
<td>5.44</td>
<td>1.445</td>
<td>2</td>
<td>7</td>
</tr>
<tr>
<td>Decreasing work-related burn-out</td>
<td>5.60</td>
<td>1.354</td>
<td>2</td>
<td>7</td>
</tr>
<tr>
<td>Barriers of the program:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Too costly for the employer</td>
<td>3.60</td>
<td>2.180</td>
<td>1</td>
<td>7</td>
</tr>
<tr>
<td>Doesn't have practical relevance for industry</td>
<td>3.36</td>
<td>1.823</td>
<td>1</td>
<td>7</td>
</tr>
<tr>
<td>Doesn't have implementation within the hospitality industry</td>
<td>4.00</td>
<td>1.915</td>
<td>1</td>
<td>7</td>
</tr>
<tr>
<td>Behavior intention of the program:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I would like to participate in the program</td>
<td>5.00</td>
<td>1.848</td>
<td>2</td>
<td>7</td>
</tr>
<tr>
<td>I am supportive of the program for our employees if there is a good model</td>
<td>5.32</td>
<td>1.725</td>
<td>1</td>
<td>7</td>
</tr>
<tr>
<td>It is likely that it would be well received by my manager</td>
<td>4.28</td>
<td>1.926</td>
<td>1</td>
<td>7</td>
</tr>
<tr>
<td>I believe GM is more likely to take advantage of the program</td>
<td>3.80</td>
<td>1.825</td>
<td>1</td>
<td>7</td>
</tr>
<tr>
<td>I believe the program is practical for manager within various contexts</td>
<td>4.72</td>
<td>1.696</td>
<td>1</td>
<td>7</td>
</tr>
</tbody>
</table>

Note. M = sample mean; SD = sample standard deviation; Min = sample minimal value; Max = sample maximum value. Number of observations for each response is 25 and the maximum value is 7.
Discussion

This study investigates extended leave beyond traditional leave systems. Companies offering such leave offered both data and comment as to the immediately realized and futuristically realized benefits to support their plans. The intention of this study is to present leave systems instituted in other industries and propose that the lodging industry, which lacks such formal long-term leave systems, consider the findings.

The results of this study indicate that sabbaticals are desired by industry executives, but a model to implement the various interpretations of leave is inconsistent and lacking needed measurable detail. Some companies have a system in place, known as professional leave, internships, externships, or PTO; however, extended leave in the lodging industry that mirror those offered by companies studied in this investigation were not found to exist in the literature nor in the participating sample.

Kimpton Hotels and Restaurants offer a program titled ‘sabbatical’, and resembles what other lodging companies refer to as extended PTO; however, Kimpton Hotels and Restaurants goes a bit beyond to compare to the system offered by Universities. The exceptions are the time permitted off (30 days) and the purpose of the leave, which is to be completely ‘unplugged’. Their model appears to be easily instituted and compared to the approach of industry in that time off is negotiated, employees must be willing to be in touch with their employer if needed, and expectations from both the employer and the employee as to the impact of sabbatical leave are specific to the position vacated.

Sabbatical leaves are communicated as arrangements that may include flex-time, extended- or professional development leave. For some employees, sabbaticals are not as attractive as having the option to have childcare or elder-care benefits, telecommuting, or alternate arrival and departure times to and from work. It appears that sabbaticals are for upper-level management and above and not an option for supervisory or hourly position employees.

The demographics of the study included CEOs, GMs, HRDs, and TMs. The number of years working by the sample ranged from 1 year to over 20 years with no distinction of the number of years over
20. Annual salaries ranged from the mid-$20k to over $250k with some failing to answer the question. The normal period for vacation or developmental leave time is from 2 to 4 weeks. Budgets managed ranged from several thousand dollars to over $100 million. The number of properties managed ranged from 1 to over 350.

The benefits of a sabbatical, as described in difference to traditional professional leave include increased knowledge, increased networking, time to refresh and renew interest in the industry, decreased burnout, decreased depression, decreased absenteeism, and increased productivity. On average all respondents would participate in a sabbatical if offered and the benefits of sabbatical leave. Disadvantages of giving upper level management extended leave are of concern. Those participating did not believe a working model that included metrics for measuring the ROI of such leave was available nor do they believe that in times when their properties are experiencing tightening of budgets is the time for sabbaticals to be offered. Upper level management is engaged with their organizations while on leave and continues to be responsible, regardless of their physical presence on property or while on leave. Professional leave, such as sabbaticals, may include a variety of temporary to indefinite departures.

According to Bradford (2001), leave due to the need to retrain, refresh, await physical plant changes, negotiate contracts or positions placement, or a departure with or without pay all classify as professional leave and can be tracked with metrics as to productivity and performance before and after the departure of the employee. The tracking would include several years prior to the employee’s leave and continue several years after the employee’s return. However, none of the organizations studied employ an ROI system as none felt it necessary.

The types of sabbatical desired was one that included pay, or at least some portion of earned salary; ability to keep current position during and returning leave, and the flexibility to decide how the sabbatical would be spent. Some of the responses as to the nature of the experience included attending educational institutions to take courses, moving to an international location, ability to benchmark other properties, working with leaders in positions they aspired to attain.
Concerns of taking part in a sabbatical include the possible lack of affordable housing, social interaction, support for meals and travel, access to the internet and adequate cell phone reception, and job security. Interestingly, one GM participating in the who was interviewed initially agreed to fully participate, but then later responded via email to state that there would be no distribution of the survey to other executives in the company for fear that they would want a sabbatical program developed.

For those who responded positively to the idea of offering a sabbatical program, the number of weeks desired for sabbatical varied depending on the type of experience desired. For those who wanted to continue to work locally, but temporarily leave their roles, time wasn’t defined. For those who wanted to return to university and continue their education, time away ranged from one to two semesters. For those who wanted an international experience, six months to one year was indicated. The majority of respondents stated that one month was most desired with regard to time spent experiencing a professional sabbatical.

The overall results suggest that sabbatical leave programs are foreign to the industry; however, had the term ‘internship’, ‘externship’, or ‘professional development leave program’ been used as the title for the leave, the survey may have been more widely accepted. The terms mentioned are familiar to lodging executives, whereas ‘sabbatical’, for most professionals, is a term used by academia. For those interested in developing an ROI program to track metrics associated with sabbatical leave, Bisk Education, Inc. now offers an online ROI methodology program for assisting companies in maximizing and tracking the ROI for all types of corporate training (Taman, 2006). Another company, YourSabbatical.com, offers a toolkit which suggests that a sabbatical can be metricized and an ROI measurement is possible (Pagano, Pagano and Southerland 2010).

A Suggested Sabbatical Model for the Lodging Industry

A suggested model for offering a sabbatical is one that is planned with criteria that must be met for upper-level management. This criteria, as a summary of the literature review and results of this
study, suggests that employees must be evaluated as ‘high performance’ employees, have worked for the company for a period of four years or more, and have a schedule of leave that includes the reassignment of a portion of responsibilities to another colleague.

Willingness to be in touch with the employer throughout the sabbatical for guidance or decision-making is desirable from both the employer and employee perspective as it keeps the employee engaged and reduces the impact of displaced talent for the employer. The use of email and SKYPE or similar technology to continue employee connected is suggested. As for details of the proposed experience, this is a program that should be designed with input from the employer and employee to achieve success.

Measurement, or ROI, is possible if prior planning of what is to be accomplished is clearly outlined. The inclusion of attitudinal pre- and post-surveys (suggested in HPWS models), defined deliverables, and employee evaluations (must include productivity expectations) are compared before and after the experience. The use of SEM is also suggested if the program is in the exploratory stage, as the use of factor analysis as an exercise in psychometric design. This analysis should also prove helpful in identifying missing variables in the sabbatical program’s design as latent variables may be constructed. Reducing the unreliability of measurement, the model may be more dependable in measurement if SEM is applied.

**Implications and Limitations**

The conclusions cannot be generalized to the lodging industry as a whole, but offers interesting results as to the sample included. For this study to be more applicable to the lodging industry as a whole, a larger sample size and an improved survey instrument are needed.

A follow-up study to accomplish an expanded sample, increased response, and an improved survey is planned. The ambiguity of measurement of the value of such leave presents hesitation and needed support for implementation; therefore, the identification of measureable variables and applied metrics to study the ROI impact is needed for consideration in the lodging industry.
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