



# Leave of absence as a retention and re-entry strategy

Collaboration and communication toolkit  
for employers and individual employees



# Mission of the AICPA Women's Initiatives Executive Committee

Promote and support the success of women to advance  
the profession together.

#AICPAWomenLead

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# Introduction to the toolkit

What happens when you find yourself at a place in your life where all your priorities are competing, sometimes even colliding?

For a large percentage of workers, leaving the workforce has been the only option for their next step. This has been especially true for women in the workforce.

This exodus of talent is crippling to the employers who need their skill sets and a major obstacle in our collective pursuit toward gender equity. Unfortunately, women, in particular, are also losing, often giving up long-term career aspirations to meet the very real responsibilities of right now.

Of course, the challenge of colliding priorities isn't limited to women. And now, more than ever before, organizations need to think differently about retaining their entire population of talent for the long term.

What if organizations chose to actively navigate the realities of an employee's personal situation?

What if staying or leaving wasn't the employee's only option?

What if there is a better way?

# How would this work?

The concept of taking a career break isn't new, but perhaps we need a new way to approach them. This toolkit is meant for collaborative use by employees and employers to create a mutually beneficial path by using extended leave as a tool.

We believe it will catapult organizations forward as they prioritize developing and maintaining their leadership pipelines. We believe it will empower the employee to predictably pause their career for a set time and to prioritize another part of life – but with full expectation of re-entering the workforce with their current employer.

## The goals of this toolkit are to:

- Expand your vision around retention and re-entry and help you to explore what's possible.
- Challenge your current policies.
- Empower both employee and employer to tackle this problem together in a mutually beneficial way.
- Show you examples of possibilities.
- Help you think differently about temporary breaks in a career.

This toolkit is not meant to be prescriptive, nor a one-size-fits-all approach. Instead, use it to launch conversations within your organization.

# For the employee

## How to request your leave of absence

If you're thinking about taking a break, you're not alone. More and more, employees are taking planned breaks away from their careers to prioritize personal or professional goals. While the length of time can vary, the most successful leave arrangements will benefit both employee and employer.

As the employee, while there are benefits, there are also challenges you'll want to understand and do your best to mitigate. If you feel certain this is your next step on your career path, we want to help you be successful.

### How do you begin?

For many people, the thought of asking for a leave of absence for any reason can be terrifying. When the reasoning feels less than traditional, even more so. Just the thought of making the request might be enough to discourage you. Follow these steps and then use the conversation guide at the end of this section to start the conversation with the appropriate person in your reporting structure.

### First, you need to be really clear on what you are requesting.

Perhaps the most important element of asking for an extended leave away from your work will be for you to know exactly what you're requesting. Clearly articulate your ownership of the process and the role you're asking your employer to play in the arrangement. If your company or organization has a formal process in place for a leave of absence that doesn't limit the eligible circumstances, that will help. If not, it's up to you to own your voice as well as your career.

Whether you're engaging in an existing process or creating your path, you absolutely need to be fully prepared when you ask for consideration and approval.

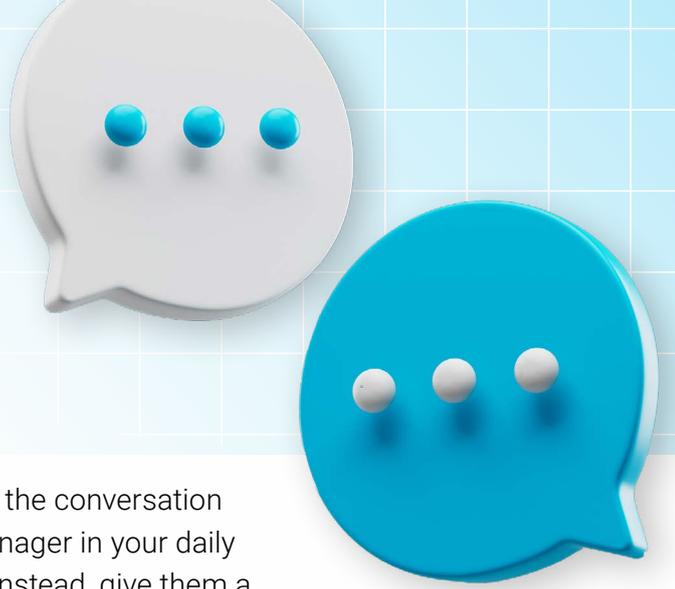
## Make sure you can answer these questions:

- Have I demonstrated consistent performance – one that would make my employer want to hire me back?
- Can I honestly make a future commitment to my employer, to the best of my ability, of my intent to return?
- Do I know what I want? Can I make a specific request? For example, can I say, “I would like to take a 6-month leave and return in March of 20XX to my current role, or to one in line with my skill set in another area of the organization.”
- What are the benefits and challenges to the team if I take a career break?
- What are the potential challenges to me? Are there potential long-term career implications I need to acknowledge to myself?
- When would I want to start my leave? Does this give my team enough time to prepare for the transition?

Once you can answer these questions, you’re ready to talk with your manager. Here’s what you do.



# Conversation guide



## 1. Ask for the meeting.

When you ask for the meeting, make sure to introduce the conversation and state your intentions. Don't spring this on your manager in your daily client-status meeting or the middle of a team huddle. Instead, give them a heads up so they know fully what to expect.

Try something like this:

*"I'd like to get some time on your calendar to have a conversation about my career and long-term future at the company. I specifically want to discuss the potential of de-accelerating and potentially taking a temporary career break. I have put a lot of thought into this, but I need your perspective and want to collaborate on what this could look like so that we all [you, me, team and clients] benefit in the long run. When would be a good time for you to focus on a conversation like that? I will set it up for us."*

## 2. Start with gratitude.

Once you begin your conversation, start by thanking your manager for discussing your career and future at your place of employment.

*"Thank you for making this a priority in your schedule this week. I want to be respectful of your time, so I've come prepared to share as much as I can about what's going on and where I'd like to propose we go from here."*

## 3. Describe your current situation, including your needs and wants, and the impact on you.

Depending on your situation, this may sound like the below:

*"I'm a working parent and am struggling with splitting my responsibilities between home and work. I've tried everything I can think of, but instead of making it work, I end up struggling to meet my expectations for myself in any role. I don't want to always be a stay-at-home parent, but I need a few months at home to get some things in order and re-organize our childcare strategy. I want to work again, and I want to work here again, but I can't do both at the same time right now. I need to reprioritize for a season. I'm asking for a formal leave with the intent of returning to our organization [date/year]."*

*“The impacts of the past couple of years have taken a significant toll on my mental health. I’m burned out mentally and physically. In the past, I’ve pushed myself to keep going, but if I keep doing that, I’m going to eventually leave this career altogether. I need a break for a few months to focus on mental, spiritual and physical restoration. I’m asking for a formal leave of absence for three months with the intent of returning in [date/year].”*

*“As a new parent, I’m realizing that I need more time at home with my new baby before returning to work. I am still learning how to be a mom of a toddler and a newborn, and I need just a bit more practice before I layer on the responsibilities of my role with our team. I’d like to extend my leave by 16 weeks, with the last four of those weeks being a tiered re-entry back onto the team with no travel.”*

#### 4. Pause. Give your employer time to respond.

If they don’t speak, ask them, “What is your initial reaction to this request?” Have some dialogue.

#### 5. Speak to how this could work for you and the employer (manager, team and clients).

This part of your conversation includes a well-thought-out, high-level plan for success. Depending on your desires and the length of leave you’re planning, it might sound something like this:

*“I am committed to making this break a success for all of us. I have always intended to have a long-term career at \_\_\_\_\_ and that has not changed. I am prepared to plan and execute a complete transition with the team and clients – both when I begin my leave and when I return. Ideally, I’d start this break [date/year] and it would last for [XX] months until [date/year]. I will maintain all necessary licensing and credentialing while on leave. If there are particular areas where you think I need to focus to maintain relevancy, I’m committed to coming back to the firm fully skilled and fully licensed in that area. I actually have a full list of questions I’d like for us to talk through at a later time so we both have clear expectations regarding our commitments to one another.”*

## 6. Listen.

Depending on your relationship and your culture, this request could be received several ways and your manager's response could fall anywhere from, "Absolutely not," to "Of course, let's figure this out together." No matter the response, have empathy and embrace the challenges that your manager will be thinking about. When appropriate, move toward the next step of planning. See [FAQs](#) for what to do if your request is denied.

## 7. Determine next steps and start working on an agreement.

Your initial conversation needs to end with an action step — a plan to reconvene and discuss specific expectations. It is not advisable to combine these two meetings because you will both need to prepare to create a mutually beneficial plan for your leave. End your meeting like this:

*"Thank you for agreeing to help me continue my career at our company while taking some time to prioritize another important aspect of my life. I will send you an email within the next week that includes specific items that we can use as a starting point. It will include a list of my commitments, my questions and any requests/suggestions. We can work together from there to incorporate your requests and requirements, does that work? Does HR need to be a part of our next conversation?"*

## 8. End with gratitude.

Again, you will want to thank your manager for discussing your career and future at your place of employment.

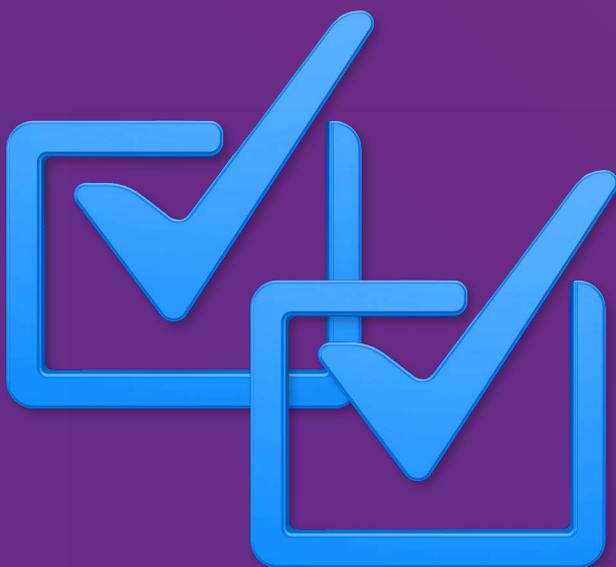
*"Thank you again for making this a priority conversation. I feel heard and valued and you've further grown my commitment to our company through your openness to this request."*

Within three days of the meeting, send the email to begin setting specific expectations for your leave. This email should include a draft of the terms including the timeline, your suggestions and request and your questions. Use the tool, [Sample Email Message to Request Expectations Conversation](#) and [Question to Ask to Set Clear Expectations](#) to prepare.

# Checklist of considerations

Once you've decided that a leave of absence is the right next step for you, and after you've had the conversation with your manager/partner, it's time to prepare for your time away.

You'll want to take complete ownership to ensure a successful transition for yourself, your clients and your team. Ideally, you'll be returning to this organization and you want to make sure you set up all stakeholders for total success in your absence.



# Before your career break

## Are expectations clear?

**Best practice: Hold an expectations meeting early with your manager/partner.**

Both parties should ask for what they need and document your commitments. You'll want to discuss the length of your break, start and return timelines, availability during your break and any requirements of the company/firm for you during your break. See the tools, (1) [Email message to request expectations conversation](#) and (2) [Questions to ask to set clear expectations](#).

## When does the career break begin and how long will it last?

**Best practice: Decide on a timeline that includes key milestones.** Proper planning is a key component in your success. You'll want to give your leaders and your team appropriate time to transition roles and responsibilities, notify clients of changes in service teams as applicable and cross-train as needed. You'll also want to be predictable with your return, setting a return to role timeline. See the tools, (1) [Questions to ask to set clear expectations](#) and (2) [Conversation guide regarding re-entry and on-ramping](#).

**Best practice: Consider a phased approach.** Resist the urge to think all-or-nothing. You can begin your career break with a phased approach and you can return the same way. The key is to be predictable and reduce as many assumptions as possible. This could include reduced hours or reduced client loads.

## How will you communicate key business items and client information?

**Best practice: Create a written transition plan.** A written plan helps you and your team best prepare and pre-solve predictable problems. Owning this part of the transition will help to set you up for a successful return. This also makes expectations and accountability clear and eliminates assumptions. See tool, [Employee checklist of roles, responsibilities and timelines](#).

## Who should you include to ensure success?

**Best practice: Share your plan and get (multiple rounds of) feedback.** Share a draft of your plan with your team and your manager/partner to get feedback. Review, revise and repeat until everyone is clear, then publish/post a final version with appropriate stakeholders.

# During your career break

For your career break to be a success for you, you'll also want to ensure you're clear with yourself about the break and how you want to use it. Daily or weekly, reflecting on these questions can help you prioritize self, family, etc. in a way that keeps you from mindlessly wandering through this phase of life.

Here are some things you'll want to think about during your career break:

- How will I ensure I am meeting my needs during this time? What will this look like? What will it feel like? What boundaries might I need to establish?
- What are my priorities during this period of life? How will I keep them as priorities?
- How will I know if I am successful in achieving what this leave intended?
- Who will be my support system? Who in my family/friend group? How will I maintain contact with friends from work?

Consider working with a career/life coach or connecting with a mentor in your community during this time to help ensure you are indeed honoring your priorities and yourself in a way that makes this leave of absence a time of investment.

# After your career break

Setting yourself up for success means looking ahead and anticipating your re-entry into the workforce. While you won't be able to completely predict the future, you can help shape it to better meet your expectations.

See the tool, [Conversation guide for re-entry and on-ramping](#) for a list of key considerations and talking points.

# Questions to ask your employer to set clear expectations

Each of the discussion questions is meant to create meaningful conversations to align expectations. There may be other questions to be asked based on the specifics of your situation. Some of these considerations may not apply to your current circumstances or your employer’s available resources, so keep that in mind as you plan your conversation.

| Questions for discussion  | Considerations  |
|---|---|
| <p><b>How would you like me to stay connected with the firm/company/profession/client’s industry?</b></p> | <ul style="list-style-type: none"> <li>• Attend the annual company meeting.</li> <li>• Maintain access to your intranet or company newsletter.</li> <li>• Have a check-in call once a quarter.</li> <li>• Continue to read profession or client’s industry research/news.</li> <li>• Perhaps an option to work remotely for a very limited number of project hours a month would best serve to keep you connected.</li> </ul>   |
| <p><b>Who in my network needs to know and who do I need to tell myself?</b></p>                           | <ul style="list-style-type: none"> <li>• Plan a detailed communication plan using tiers for clients and contacts – Who needs a visit? Who needs a phone call? Who needs an email? Make sure you include who to contact in your absence.</li> </ul>  |
| <p><b>Ensure you set up your team for success by thoroughly preparing for the transition.</b></p>         | <ul style="list-style-type: none"> <li>• Use the tool <i>The employee’s checklist of roles, responsibilities and timelines</i> to build your transition plan.</li> <li>• Remember that your planning needs to incorporate your re-entry plan, too.</li> </ul>   |
| <p><b>Is there an option for a short-term leave of absence rather than a total break in service?</b></p>  | <ul style="list-style-type: none"> <li>• The length of your request for leave will carry specific considerations. Shorter-term needs will not require the same commitments nor resources as longer-term leave.</li> <li>• Consult HR to ensure that your need is best satisfied by the arrangement you are proposing, certain scenarios might qualify for other types of arrangements your employer specifically offers.</li> <li>• Consider a shift to an independent contract status.</li> <li>• If you plan to do freelance or part-time work anywhere else, disclose this to maintain the trust this type of arrangement requires.</li> </ul> |

| Questions for discussion   | Considerations   |
|--|--|
| <p>How can we plan now for my on-ramping and re-entry?</p>   | <ul style="list-style-type: none"> <li>• Commit to a specific time span (a returnship) that is dedicated to re-orienting and re-onboarding. Don't just jump back into the mix!</li> <li>• Use a phased approach to reacclimate during your return to work.</li> <li>• Go back through all formal onboarding activities (orientation, etc.) to ensure you're current on the culture.</li> <li>• Request that the firm provide a career coach/mom coach/life coach (a specific type of coach for your needs) to help everyone make the transition back the best for everyone.</li> </ul> |
| <p>Will you need to maintain your health benefits through your employer?</p>                                   | <ul style="list-style-type: none"> <li>• Depending on the provider terms, you may be able to continue coverage through your employer. In some cases, you may need to assume payment of all premiums if the employer currently subsidizes for you. However, some employers may choose to continue to pay their part of the plan.</li> <li>• Have the conversation to understand your specific situation and options.</li> <li>• Keep in mind that state laws and specific provisions of health care plans may impact what is possible.</li> </ul>                                       |
| <p>Are there any particular skills/designations that would make me more valuable when it's time to return?</p> | <ul style="list-style-type: none"> <li>• Think about your organization's strategic plan to identify what future skills could you hone or learn during your leave – offer that as part of your agreement.</li> <li>• Ask the firm to pay for new credentials/maintaining licensing and CPE while on your break with the agreement that if you have to alter your return to work plan, you will assume financial responsibility and reimburse the firm.</li> <li>• Ask to participate in firmwide CPE opportunities to maintain licensing.</li> </ul>                                    |

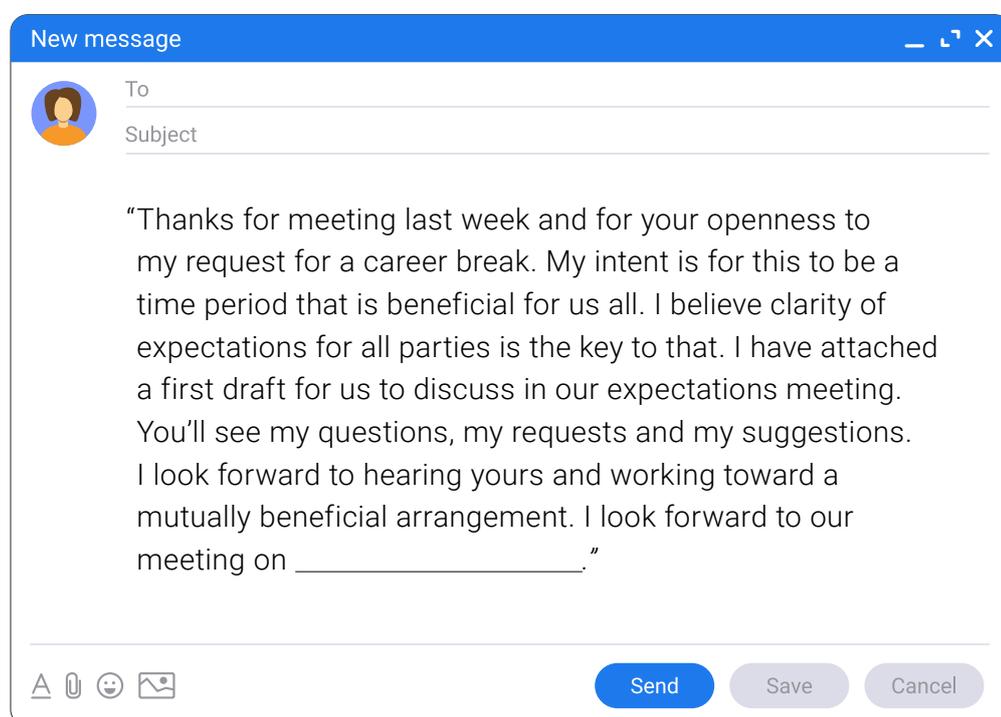
# Sample message to request meeting to set expectations with draft terms/requests

After you've met to introduce and ask for your leave of absence, you'll need multiple conversations to negotiate your specific terms.

Below is a sample email message along with a sample/draft terms that should be sent ahead of a face-to-face meeting (virtually or in-person) to discuss and negotiate the specifics. This sample email and the proposed terms are not a prescriptive nor exhaustive list. The size of your organization will affect what resources can reasonably be requested and your situation will affect what you ask for and commit to doing.

As you think about your needs and begin to craft your initial request, think about your company's resources when determining reasonableness. However, err on the side of discussing a request rather than assuming it will not be possible.

See the tool, [Conversation guide for re-entry and on-ramping](#) for a list of key considerations and talking points.



## Sample draft terms/request for conversation

My request is to take a career break with a suspension of compensation on **[date]** for the time period of **[XX months]**. My return to work will take place in **[month/year]**. I am committed to returning to **[employer]** and progressing my career here.

I will work in collaboration with my manager, team and clients to ensure success for everyone to the best of my ability.

Here are some initial considerations for further discussion.

### I commit to/request:

- Create a written plan and publish it to relevant stakeholders.
- Maintain licensure/CPE for (list specifics) and would like for the organization to continue to pay for during my career break as an act of mutual faith.
- Reimburse the organization for any fees paid during my leave if, for any reason, I do not return to the organization by the agreed-upon date, unless we mutually agree to alter my return to work date.
- Actively participate in check-in calls with my manager on an agreed-upon time frame.
- Read any relevant company news that will be emailed to my personal email account.
- Speak freely of my arrangement with my family and friends to promote the good faith of the company and help others to see alternative paths for their careers.
- Attend any onboarding/new hire programming upon my return to work.
- Attend any technical training/refreshers the manager suggests upon my return to work.
- Access to a career coach/mom coach/life coach upon my return paid for by the organization.
- Reimburse fees associated with the completion of the (list license/credential) upon return to the firm.
- Schedule and prioritize onboarding/new hire programming upon return to work.
- Schedule and prioritize technical training/refreshers upon return to work.

# Conversation guide for re-entry and on-ramping

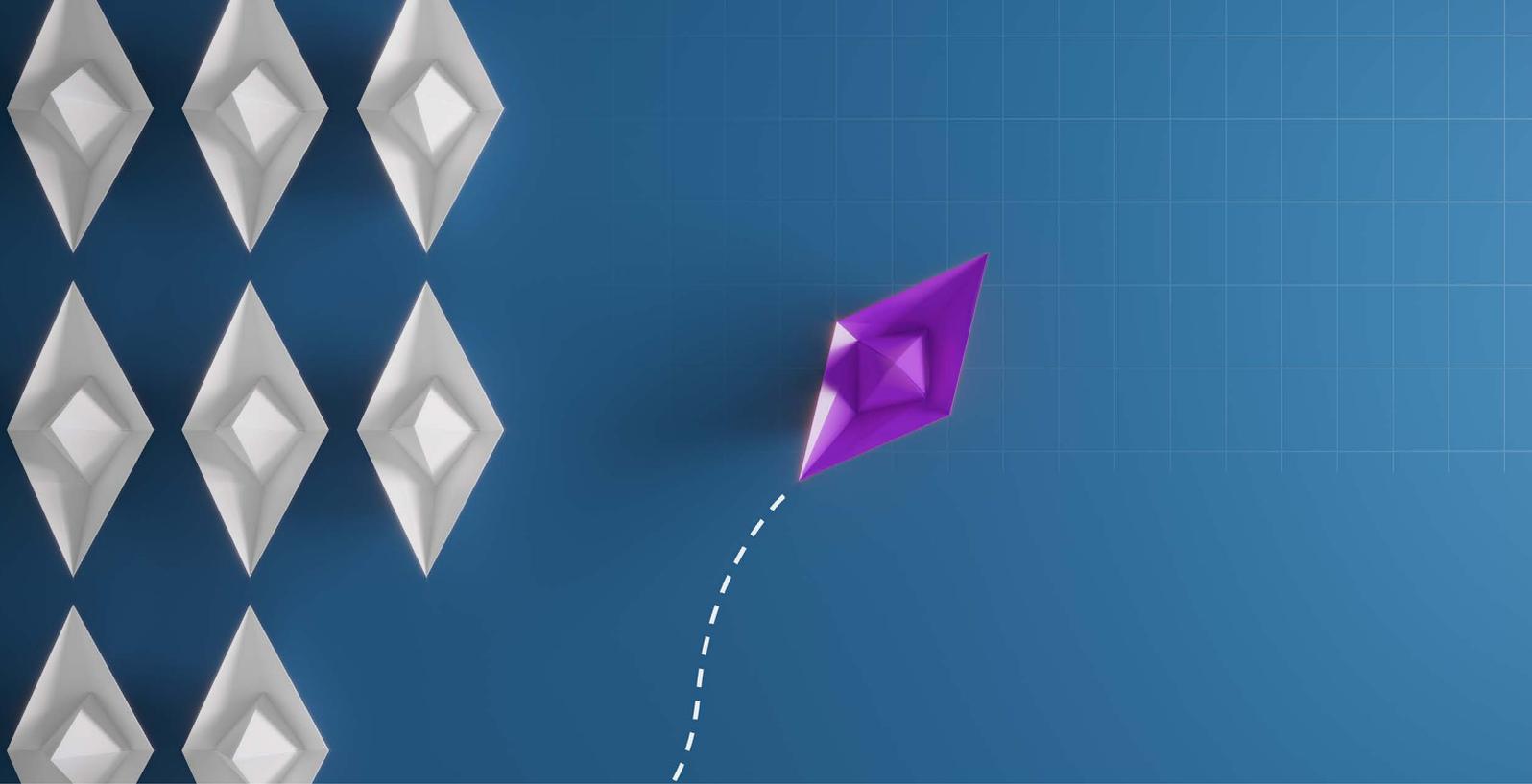
Choosing to use a leave of absence as a career strategy needs to be thought of in three phases: (1) preparing for leave, (2) taking leave and (3) returning from leave. The companies and employees who are successful at using personal leave as a tool will pay close attention to phase 3.

Studies show that most women who leave the workforce have every intention of re-entering. Think of your career as an interstate – you exit for a moment to refuel – but you intend to continue toward your career destination. If you're going to re-enter the workforce successfully, make sure you know which on-ramp to use and how to merge back into traffic.

Here are considerations for yourself and conversation points to discuss with your manager, which likely will be multiple conversations along the way:

## Questions to consider for your return from leave:

- Will you come back to work immediately at 100%? Is there an option to consider a phased re-entry approach? (i.e., customized seasonal schedule, reduced hours, reduced workload, part-time, hybrid hours or location and full-time remote)
- If you are returning on a phased re-entry approach, what conversations will you need to have to ensure opportunities are presented equitably?
- What would a 3-month or 6-month returnship look like?
- Will you return to your previous role or will you return to another role/department/team?
- Will you return to your same level/classification?
- Will you return to reduced hours or reduced travel?
- For any set of return arrangements, do you understand how your preferences could potentially affect your salary, advancement and promotion opportunities in the organization?



## Other things to consider

- **Career routes do not need to be linear to be successful.** Exiting your organization in one role and returning in another can be a great way to return with faster acceleration. Resist the urge to think of your career as a ladder and replace the image with a rock wall — breaks in our careers are like resting on a cliff from where you can catapult yourself onto the next ledge.
- **Career pauses or breaks have the potential to bring great clarity to your individual goals and career priorities.** As your awareness increases, be intentional to communicate with your manager/partner about how and where you think you can best serve upon your return. Perhaps it is right back in your former seat, but in cases where the position cannot remain vacant during your break, perhaps there is a different or even new role that aligns with your purpose and the company's mission.
- **What happens if your intent to return changes?** It is always possible that circumstances or minds change and intent to return no longer applies. If you left in good faith of a return, which most do, this could lead women to feel guilt over changing their agreement or letting someone down. The key here is to communicate any change in the re-entry plan as soon as possible to your employer. Their workforce planning will include you and your skill sets, and they will need to know as soon as possible regarding a change of plans. Think about the impacts carefully before altering an agreement for your return to work. See [FAQs](#) on what to do if this happens to you.

# For the employer

## Setting expectations as the employer

As the employer, using a leave of absence as a tool can help you develop and maintain leadership and talent pipelines.

For the tool to bring positive results for both you and the employee, clarity of expectations is a requirement.

While the employee, ideally, should be driving the conversations, you'll want to be clear on what you're asking the employee to do before, during and after any version of a career break. Use these points in your expectation-setting conversations paired with the tools, [Conversation guide checklist](#) and [Example memo of understanding](#).

Firms and companies who create guidelines and best practices for formal leaves, complete with planning guidance and return to work plans, will have the most success using this tool. Guidelines can help with equity and certainly improve accountability.

Whether or not formal guidance exists at your organization, these are points to be considered uniquely, at the individual level, for each conversation to set specific expectations.

Keep in mind, there will be times you have the responsibility to bring up the discussion of this potential strategy directly to an employee. Often, employees will not think of this as a potential navigation option. It's your job to ensure equity in that process — this option should be an available consideration for all employees, even though it will not be the path for all.

# Questions to answer to set clear expectations

- Has the employee clearly defined what is being requested? Keep in mind, the rationale for the request is not yours to evaluate. (If the employee is making the request, they believe it is necessary. That doesn't make it automatic.) OR, is a leave of absence something I should discuss with this employee for consideration?
- Is there a formal practice/policy I need to use to guide our collaboration?
- What are my concerns? What could be the benefits?
- What do I need from the employee to make this work?
- Am I willing to do what is being asked of me? The team? The company?
- How will we address any breach in the agreement?
- How/when does HR need to be involved?
- How will we handle the transition to career break to ensure client/customer service does not suffer?
- How will this be communicated to our team? Our clients?
- What are my requirements for this employee during the career break?
- What are the needs of the employee during the career break?
- Have we established a written transition plan for the team?
- How will I set realistic expectations while ensuring that the employee's salary, promotion and advancement opportunities are not unreasonably affected negatively?
- Have we established a framework for re-entry?
- When will we check in to ensure intent to return?
- How will I maintain this relationship?
- Are these expectations clearly established and memorialized for accountability?

**A note to employers:** If your organization has specifically outlined a policy that states how leave of absence can be used, you may need to seek special approval or begin the process of expanding the policy. You'll also want to collaborate with HR to ensure state laws, FMLA or other guidelines are not unintentionally affected.

# Manager's conversation guide with example message and checklist

A leave of absence can be used as a strategic tool, individualized to the employee, used to create and maintain talent pipelines and mitigate long-term skill set loss. Using them successfully will require empathy, collaboration and rely on strong, courageous and authentic conversations.

Overall, keep in mind that the context of the conversation about a leave of absence matters deeply. If a tool like this is to be used

successfully, you'll want to be clear that you intend to help the employee succeed.

This conversation guide applies to all career-navigation conversations you have with an employee – it is not a script – but we provide you an example message and template to build a script as a resource. Use the tool, [\*Template to build a custom script for discussing a career break with an employee.\*](#)

## Three keys to conversations for managers

### 1 State your intent

Asking to use a leave of absence, or considering the idea when presented as an option, will not be easy for most of your employees. Throughout the conversations, as the manager, you'll need to be very clear on your motivations and communicate your desired intent to help your employee succeed. Be clear, be direct and avoid any vagueness. Your messaging can be simple, but it must be transparent in each conversation.

### 2 Demonstrate empathy

There will likely be many emotions tied up in a decision to take a career break for everyone involved. With that in mind, demonstrating empathy along with active listening and asking great questions will be necessary skill sets. Use language that demonstrates a shared interest in success.

### 3 Define expectations and accountability

There must be a shared responsibility for outlining expectations. As the manager, the majority of accountability for those expectations will fall to you. Use initial conversations to lay the groundwork, and then subsequent conversations to reinforce this message.



## Specifics for expectation-setting conversation(s)

Once you have agreed to move forward with using a leave of absence as a strategy for a particular employee, you'll want to quickly set aside a collaborative meeting time to begin developing, together, the terms of the agreement. We recommend this be done quickly for two distinct reasons: 1.) A long, drawn-out process signals lack of support or buy-in from the manager and 2.) by the time using a leave of absence as a strategy in career navigation is on the table for discussion, it is often (but not always) getting close to a crisis moment for your employee.

This toolkit includes specific resources for the employee that you'll want the employee to use, however, the success can't rest solely on the employee.

Following is a sample message using the three keys from above. It is meant only to be an example to you for how to clearly state your intent, demonstrate empathy and define your role in setting expectations and accountability. You will need to set aside time to think about the personal situation of your employee and what you need to communicate with them to achieve mutual success:

### 1 State your intent

*"Your success is deeply important to me. I want to work together to ensure we are both very clear on expectations and so I can be your best advocate."*

### 2 Demonstrate empathy

*"I imagine a leave of absence creates some anxiety for you – I fully appreciate that – and I don't have all the answers about how this will work. It is my ultimate goal to co-create a game plan with you. One that works for everyone, and the end game is that you return to our team feeling really positive about the experience. Now, that will be easier said than done, so I am going to do a lot of question-asking and a lot of listening as we navigate this uncertainty together. How does that sound? Do you have anything specifically you want me to do during this process?"*

### 3 Define expectations and accountability

*"I believe that proper planning will help you be most successful, so I'm going to be fairly specific about defining expectations clearly and then holding us accountable. At the end of all of this, I'm going to ask you to capture our agreement in a Memo of Understanding. I'll also be providing a template for capturing our plan for transition. This is your career, and your career break, but we all need it to be successful, so I'm in this with you."*

## Manager checklist for conversation(s)

- Have I expressed my support to help the team member be successful?
- Have I displayed empathy?
- Am I using active listening techniques – listening checks? paraphrasing? – to ensure that I am hearing the employee clearly?
- Have I asked enough questions? Am I unclear on anything?
- What expectations have been set in this conversation?
- Have we defined accountability for every expectation?



# Template to build a custom script for expectations conversation

Before using this template, review the tool, [Manager's conversation guide with example message and checklist](#).

## State your intent to support

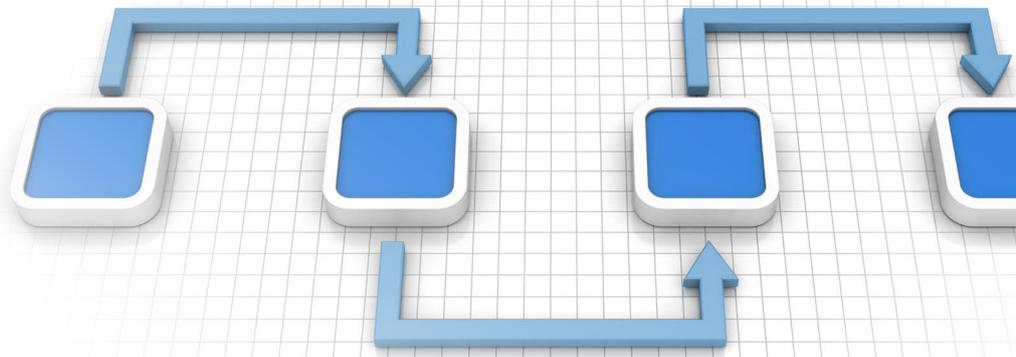
- How do you want to help this employee?
- What do you want the outcome to be?
- How will you commit to accomplishing this?

## Demonstrate empathy

- Acknowledge how you perceive the employee's emotions regarding the career break discussion.
- Commit to listening.
- Commit to understanding.

## Define expectations and accountability

- Specifically, outline expectations for creating the plan for the career break.
- Detail how you will set those expectations together.
- Say how you will create accountability.



# Checklist of roles, responsibilities and timelines

## Name – Career break plan

***[Updated XX.XX.XX]***

The following will be a collaborative effort among the \_\_\_\_\_ team along with key stakeholders within the company/firm to ensure an uninterrupted business function during my career break.

## Overview

This plan outlines the functions that I am responsible for and will serve as both a working document and, in its final form, a project plan to follow during my career break. I will be prepared, and my team will be prepared, for my last day of work to be on ***[Month/date]***. I have set a return to work date of ***[Month/date]***.

## Plan

To prepare for my time away most thoroughly, and to set up my team and clients for success, I commit to full ownership of the transition. I will hold a series of planning sessions with my manager to clearly set expectations and define accountability and will lead transition and training sessions with the team to map out all the projects and the functions that need to be covered in my absence.

I will also seek input from these key stakeholders so they can help me identify gaps.

***[Name(s) of stakeholder]***

***[List them all to be as thorough as possible]***

I will work with my manager to delegate as appropriate to members of my team and/or train my replacement if applicable. I will ensure any training that is needed is completed by ***[DATE]***. I will ensure technology permissions are given to appropriate people and access to my emails given to \_\_\_\_\_ in my absence.

I will also communicate the final plan with all stakeholders who are affected, namely these contacts:

*[List of key stakeholders with whom you'll share your final plan]*

*[Include internal (peers, collaborators and senior leaders)]*

*[Include external (clients, of course—but don't forget about vendors or strategic partnerships)]*

These projects/client engagements will be completed by the time of my leave:

- **Project/client name** *[Assignment name – status]*
  - Note info needed, status, etc.

The projects/client engagements will need to be completed during my leave:

- **Project/client name** *[Assignment name – status]*
  - Note info needed, status, etc.

The full details of projects are listed in the “Plan details” section. I will keep this project monitor updated regularly and mark items as completed for visibility. It will be shared in this location for ongoing access and in its final state: \_\_\_\_\_

### Plan details/current status

| Date | Function/project | My role/status | Assignment of responsibilities; note any training needs |
|------|------------------|----------------|---|
|      |                  |                |   |
|      |                  |                |   |
|      |                  |                |   |
|      |                  |                |   |
|      |                  |                |   |
|      |                  |                |   |
|      |                  |                |   |

## References

### **Key contacts and relationship owners**

*(external contacts)*

#### **Client name**

*(points of contact, contact information)*

#### **Vendor**

*(description of service, etc., points of contact, contact information)*

#### **Other**

*(description, etc., points of contact, contact information)*

### **Internal relationships/responsibilities**

For any internal recurring responsibilities, list points of contact for items delegated to others while you are on leave. Include any pertinent information.

## Out-of-office reply during career break:

### **Inside my organization:**

Thank you for your email. I'm using this month/year to focus on priorities away from the office. During my leave of absence, a member of the \_\_\_\_\_ team will be available to you and is prepared to assist you. Please email \_\_\_\_\_ directly for your most immediate response.

### **Outside my organization:**

Thank you for your email. I am currently on a leave of absence. During this time, \_\_\_\_\_ is your contact. You can email directly at \_\_\_\_\_ or call at 555.555.5555.

# Considerations for performance management

Regardless of what they're called, leave of absence or career break or something else, employees have long used time away from a career as a last resort. Why a last resort? Because of the many unintentional consequences that career breaks often imposed, obviously career progression is one potential negative impact.



Organizations that want to successfully use leave or breaks as strategic retention and re-entry tool will consider these three biggest fears of employees, specifically working mothers, re-entering the workforce based on research from LinkedIn:<sup>1</sup>

1. **That they won't be up to date on the skills required to do their job**
2. **That they won't be able to manage both the responsibilities of their home life and job successfully**
3. **That they will be viewed as less capable than they were before**

Additionally, employees will likely also experience fear around impacts on earning potential and salary impact, missing advancement opportunities and being left out of promotion considerations.

As such, employers who treat any break in a career as a mutually beneficial tool, can alleviate these fears and interrupt the delay in career progression by addressing the following:

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## Fear 1: That they won't be up to date on the skills required to do their job

### What can you do?

- Clearly articulate your support and how the employer will invest in training, skill-building and other on-ramping activities during re-entry. You'll need to particularly target:
  - Ensuring skill sets are up to date and current, including outlining the technical expectations for the role
  - Establishing clear expectations for return (consider a returnship period) that include 30-, 60- and 90-day goals/milestones; ensure you'll tie performance evaluations to the goals set and met, along with any other clearly articulated expectations.
  - Ensure that performance management processes account for the leave of absence so that formal evaluation is not withheld and that regular coaching should be a daily priority for managers overseeing an employee returning from leave

<sup>1</sup> <https://www.linkedin.com/pulse/nearly-half-mothers-work-take-break-again-why-still-stigma-fairchild/>

- Prioritize the re-entry to include cultural components (new hire orientation and meetings with managers – just like you would do for a new employee.)
- Before finalizing the leave of absence, have to-the-point conversations about the potential impact on career progress. But, you will need to keep an open mind, too. Maybe a promotion while on a break isn't reasonable, but if a position is open when the employee's leave ends that includes a promotion, it should be considered. Let the employee know this.

---

## **Fear 2: That they won't be able to manage both the responsibilities of their home life and job successfully**

### **What can you do?**

- Performance management processes should include holistic conversations about the employee's career – including mental health and well-being. Offer empathy and know when to pull in additional resources.
- Provide access and pay for “mom coaches” – different than career coaches – but someone who specializes in this transition to working mom. There is a growing pool of these life-phase coaches who have skill sets that most managers do not. (Make sure to investigate the current offerings of your employee assistance program (EAP). It may already be a part of your EAP or workplace wellness toolbox. Many EAPs have similar specialties for other phases: caring for special needs family members, dealing with addiction, etc.)

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## **Fear 3: That they will be viewed as less capable than they were before**

### **What can you do?**

- Consider the language used to describe the break itself. You'll assign connotation and meaning with every interaction both for the employee and the team. Watch out for microaggressions and “jabs” such as: “your little vacation” or “playing hooky” and the like to refer to a career break. Prioritize affirming language and frequently outline the mutual benefit to the employee and the company.
- In the employee's absence, keep them in mind and consider them in staffing and strategy conversations. Serve as their sponsor and advocate, talking about them in their absence, and commit to them that you will play that role both during their absence and upon their return. This will have the most significant impact of all on their career progression overall.

# Sample memo of understanding

This is a sample memo of understanding – meant to serve as an example of how to memorialize the agreement between employee and employer. Like all resources in this document, it is meant to serve as an example but not meant to imply the terms outlined are the only way to structure a leave of absence as a strategic career tool.

The memo of understanding is critical because it is the final documentation of all the previous conversations, mutually agreed upon specifics and the responsibilities accepted. Time frames should be specified, and all vagueness removed. Review this example in the context that these are the agreements the hypothetical employee and employer have negotiated and agreed to – the focus is on the clarity of the document and the intent to create accountability.

---

## Memo of understanding

**TO:** *[Manager]*

**FROM:** *[Employee]*

**SUBJECT:** Leave of absence

**DATE:** *[Enter date]*

**CC:** HR manager

---

### Statement of intent:

In agreement with my manager, *[Name]*, I plan to begin a career break on *[Date]* for the time period of *[XX months]*. My return to work will take place in *[Month/year]*. I am committed to returning to *[Employer]* and progressing my career here.

### Our agreement:

I will take complete ownership of my leave of absence, working in collaboration with my manager, team and clients to ensure success for everyone to the best of my ability. In mutual expectation setting with my manager, these are our agreements:

### I will:

- Use the [Checklist of roles, responsibilities and timelines](#) my manager provided to draft a comprehensive transition plan.
- Get feedback from all relevant stakeholders and revise until all are in agreement on this transition plan.
- Create a written plan and publish it to relevant stakeholders.

*(Continued on next page)*

- Maintain licensure/CPE for (list specifics), for which the firm will continue to pay for during my career break.
- Reimburse the organization for any fees paid during my leave if, for any reason, I do not return to the organization by the agreed-upon date unless we mutually agree to alter my return to work date.
- Disclose to my manager immediately any intent to seek employment while on my career break.
- Actively participate in quarterly check-in calls with my manager.
- Read the company newsletter that will be emailed to my personal email account.
- Speak freely of using a leave of absence as a strategic career tool with my family and friends to promote the good faith of the organization and to help others to see alternative paths for their careers
- Actively participate in at least 12 sessions with a career coach/mom coach/life coach upon my return to work.
- Attend any onboarding/new hire programming upon my return to work.
- Attend any technical training/refreshers suggested by the manager upon my return to work.

**Company will:**

- Provide the Checklist of roles, responsibilities and timelines to draft a comprehensive transition plan.
- Give timely feedback on draft and revision until all are in agreement on this transition plan.
- Pay for the maintenance of licensure/CPE for (list specifics).
- Set up quarterly check-in calls with me.
- Send the company newsletter/relevant information to the personal email address provided.
- Reimburse fees associated with the completion of the (list license/credential) upon return to the firm.
- Speak positively of career breaks and promote them as win-win tools for career progression.
- Pay for a career coach/mom coach/life coach for the employee for up to 12 sessions, which may be extended upon mutual agreement upon return to work.
- Schedule and prioritize onboarding/new hire programming upon return to work.
- Schedule and prioritize technical training/refreshers upon return to work.

# FAQs and common barriers

The idea of using any form of leave, no matter what you call it, as a strategic tool for retention may stretch your preconceived ideas about how careers progress. It's important to maintain an open mind as you explore new and customized options that are individually directed for the benefit of the overall organization.

## 1. I'm a small company, how can I make this work?

The size of the organization will have some impact on the scale and scope of your entire leave arrangement. For example, offering resources like return-to-work coaches may be out of your budget today. However, if this tool is incorporated into your larger people strategy and organizational growth strategy, it can be incredibly impactful for the retention of talent and can evolve with success. The key? Start where you are and think creatively.

Questions to ask/discussions to have:

- How can you use the natural ebb and flow of traditional busy seasons to make the timing work?
- Can you use independent contractors to fill in gaps?
- Are there options to do a tiered approach to both exit and re-entry to make transitions more manageable for everyone?
- What can you do?

## 2. As an employer, what happens if a change in business strategy means our agreement with the employee no longer makes sense for the business? For example, there's a merger or some other strategic shift in our plan.

Just as the employee may have instances where intentions change, so may the company. In both cases, the requirement is transparency and open communication. The responsibility of the company is to ensure that the inability to bring back the employee as previously agreed upon is based on the role, not the absence.

If the employee was present/active, would the role be eliminated/reassigned/downsized? If the answer is yes, then that is a hard conversation and part of doing business. You'll need to meet all the requirements of such actions and be able to demonstrate the employee's leave status did not affect the decision.

If the answer is no, then the leave agreement itself needs to be revisited. Contact the employee, explain the strategic changes, and allow participating in decision-making about go-forward steps. Depending on individual circumstances, the employee may choose to return earlier than previously agreed on.

**To consider:** If the employee feels pressured to return early, there is a strong likelihood it will create trust issues with the employee. How you handle the conversations and the support/on-ramping activities can go a long way toward rebuilding trust and commitment.

### 3. As an employer, what if the request by the employee can't be met?

A few things to keep in mind here — if the employee has come to you requesting to leave the company for some period, you can feel fairly certain that the employee has given this a lot of thought. Still, there may be situations where the employee's request doesn't make sense strategically and/or operationally. What do you do?

First, ensure that your criteria for receiving, reviewing and evaluating this type of request are equitable. Having your process and requirements documented is necessary. If you follow your process, and the company cannot agree to the request, have a conversation with the employee and talk about why.

The most critical factor, though, is that you are realizing what this employee's request signaled — a need for support, help meeting their commitments, prioritization struggles, potential burnout and often a red flag for turnover. What can you do?

If the employee chooses to resign, and if they are someone you'd rehire in the future — make sure they know that. Give them time and space, and then ensure you have a plan in place to reach back out to re-recruit along the timeline they had initially requested.

#### 4. Beyond the plans laid out in this toolkit, how should this be documented?

Each organization must decide on the level of documentation required. For most, completing the Memo of Understanding with very specific terms between the manager and the employee will be enough. It's always a best practice to include HR and place a copy in the employee's file, but this doesn't have to mean a lot of paperwork. You also will want to review your current policies around using a leave of absence to ensure they allow for maximizing leave as a career navigation tool and adjust as necessary.

#### 5. As an employee, what if my request to use this type of leave is denied?

While using leave as a strategic option for supporting employees should be open to all employees, there will be times it is not in the best interest of both parties to approve exactly as requested. Compromise and negotiation will be important for both the employee and the employer.

If the answer to your request is, "no," then follow up with a few questions:

- Can you help me understand why?
- What is possible?

Remember, the better you can lay out a reasonable game plan (using the tools in this toolkit), the better your conversations and collaboration will be. Take complete ownership of the process. If the answer is still, "no," then your next step decision must be based on what is best for you.

#### 6. If I don't feel comfortable talking to my direct manager about using leave as a career navigation tool, who do I talk to?

If, for whatever reason, you feel uncomfortable talking to your manager, perhaps start with a senior leader with whom you do feel comfortable. You will need to talk about this with your manager at some point in the process, however, talking with your manager after having prepared for the conversation with a mentor or sponsor should help you feel equipped. Your company's HR contact(s) should also be a resource for you.

## 7. What if my intent to return changes while I am on leave – what do I do?

First, know that this will happen to some people. If you left with the full intent of returning and made plans to do so in good faith, then something changed during the time you were away, there is nothing to feel guilty about. However, you have agreed – and your terms should clearly outline what happens if you do not return as agreed upon. A very clear Memo of Understanding is important.

Beyond those details, be open and honest and talk to your manager as soon as possible. Do not wait until the day you're supposed to come back to work to tell your manager you're not returning. You will want to provide as much lead time as possible so they can handle staffing, etc., appropriately. At some point, you actually may want to work for this company again. How will you make this situation positive so that the company would want to hire you later?

## 8. What are examples of when I might need to prioritize another area of my life and use leave as a career navigation tool might make sense?

- Mental health and burnout
- Significant family or personal life event
- Caregiving needs
- Studying for a licensure exam (i.e., CPA, insurance)
- Life experiences like extended travel or serving
- Parental leave

# Putting it all together

We hope this resource will open your mind to think differently about career navigation – to ask questions such as, “What’s possible?” Then, to be creative with how you answer.

Using this toolkit successfully will depend on your ability to collaborate and communicate, one conversation at a time. Resist the temptation to attempt to copy and paste the content as your approach.

In the end, the goal should be a mutually beneficial arrangement for both employee and employer. One that returns talent to the organization in the future, while supporting the employee’s priorities today.





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