

# Extra Vacation for Boomers

by Pat Katepoo

## A Negotiation Strategy Guide

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Pat and WorkOptions have been featured in *The Wall Street Journal*, *Smart Money*, *BusinessWeek*, *US News & World Report*, *Chicago Tribune* and dozens of other magazines and newspapers, as well as in more than 40 books including *The Working Mother's Guide to Life*, *Working After Retirement for Dummies*, and *The Wall Street Journal Guide to the Business of Life*. Pat was the featured expert on a special *NBC Nightly News* segment on flexible work.

Learn more about her other downloads and services at [WorkOptions.com](http://WorkOptions.com).



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# Extra Vacation for Boomers: A Negotiation Strategy Guide

You're a baby boomer coming to grips with deferred retirement, yet you want more time off *now*. You'd like to take more frequent trips or see your grandkids more often through the year—*this* year, but your employer's vacation policy stymies your plans. What to do?

Most of what you read about vacation for Americans is not good. The United States has been labeled the “No-Vacation Nation.” As a workforce, our vacation practices reflect paltry employer policies and the work culture that supports them. Millions of earned days go unused.

More than 120 other countries have laws entitling workers to paid time off. In the US, it's all employer-driven.

Until now.

There's no law yet, **so it's up to you to ASK for what you want**. Let me guide you along the path to approval.

## How to Craft Your Own Vacation Leave Terms

Just as with flexible work, you can negotiate new work terms on an individual basis. Individual arrangements are *not* uncommon, but you *won't* get an internal email announcing them!

**1. First**, have a clear understanding of what is a reasonable number of added weeks of vacation leave to request. You don't want to blow your chances of getting approval with a way-out request.

**2. Then** follow the most expedient path to approval (but note the time-sensitive exception).

**3. Finally**, put it all together to make your request, once again positioning your baby boomer status as an *advantage*.

## When you're ready, use the Boomers' Vacation Leave Memo Template to:

- Request more vacation time without sounding like a slacker
- Highlight your many years of experience without sounding *old*
- Present your request confidently, but without sounding presumptuous

You'll find the vacation leave memo template toward the end of this document.

## How Many Extra Vacation Weeks to Request

The average vacation leave in the United States is 10-14 days, or two to three weeks a year.

But if you've been with the same employer for 5, 10 or 20+ years—not uncommon among baby boomers—you probably get three to four weeks off annually. (And if you get five weeks or more, count your blessings. You're way ahead already.)

Whether it's two, three or four weeks, you've concluded it's not enough vacation leave to match your time off plans. At this stage of your career game, you want more.

But how many more weeks should you ask for?

Using the average figures noted above as a baseline, here's my general rule of thumb for negotiating additional vacation leave:

**Aim for up to 2 more weeks, totaling no more than 5 weeks. That is,**

- if you get 4 weeks a year now, negotiate for one more, to equal 5
- if you get 3 weeks a year now, negotiate for two more, to equal 5
- if you get 2 weeks a year now, negotiate for two more, to equal 4

Why these numbers?

Getting approval of one to two additional weeks is obtainable, while enjoying five weeks away from the office throughout the year is a comfortable stretch beyond the usual.

## Spread Your Weeks Throughout the Year

This time off tactic is to be used in chunks, i.e., a week or two here, three weeks there, over 12 months. Being sensitive to work coverage issues, you won't request four or five weeks off at one stretch unless you have a [job sharing arrangement](#).

(Your employer may lump all types of leave time into one account. Of course, it's easier to map out your vacation plans than your illness plans, so this can get tricky. Still, two weeks remains a reasonable amount of additional time to request.)

## The Request Strategy

The company policy says X number of weeks off. Your new custom-crafted “policy” says X + 2. Now you need your employer to approve that extra time off. Breaking the constraints of your company's vacation leave policy requires a strategy that is *most likely* to get approval.

The suggested strategy I recommend combines two tactics:

A. An accepted Human Resources (HR) practice.

B. Well-crafted positioning (and yes, you're going to play the baby boomer card because it has weight that works).

What you will *not* do is trade a forthcoming pay raise for extra weeks of vacation. That works for Fridays Off and other part-time arrangements.

For example, in [Fridays Off](#) Option #1, it's possible to negotiate a 10% cut of your work hours in lieu of a 5% raise. That's a cool value-added trade.

But trading money for time is a poor value for Extra Vacation. Here's the logic:

- One week of pay = 2% of your annual salary (1 divided by 52)
- Two extra weeks of paid vacation leave equals 4% of your salary.

A 4% pay raise is within the range of average raises, so the trade-off in this case would be close to even.

### **What's wrong with an even trade?**

It may sound acceptable until you take into account that your future pay increases are a percentage of your base pay, a base that would have stalled the year it was traded away.

Poor trade-off value.

Instead, accept any salary increases that come your way and *buy* your two extra weeks off.

### **Purchasing Time Off is a Perk?**

Several large companies—Xerox is among them—allow employees to buy extra vacation days.

According to an item in the August 13, 2007 issue of *Business Week* magazine, “the cost of the extra time is deducted from your pay over the year, often in money-saving pretax dollars.”

Who would have thought? Purchasing time off as a perk!

## Do-It-Yourself Purchase

Though your employer may not offer such an arrangement, it probably has something you can use. It's an accepted HR practice called "leave without pay" (LWOP).

Many companies have formal LWOP policies. Check if your employer is one of them and read it carefully to see how your vacation leave request might apply. Your aim: to make your petition *conform* with employer-wide HR practices wherever possible.

So the first half of the strategy you'll use to boost your annual vacation time is to request leave without pay for the added weeks off.

It's the most expedient path to approval.

## What? Without Pay?

Are you having a knee-jerk negative reaction to the "without pay" strategy? Take a look at the broader view:

- You're likely in a life phase or career stage where you're willing to trade money for more time. This is a worthy example of doing just that. Taking two weeks off without pay trades only 4% of your annual salary.
- You already get some paid vacation leave according to your employer's policy. And remember, if you deserve them, you should also be regularly [asking for merit raises](#) as a way to max your income.
- If your financial house is in order, e.g., little or no consumer debt, retirement savings on track, following a budget or spending less than you earn as a regular habit, etc., you can afford extra vacation leave without pay.

(If you *can't* afford to live on 96% of your current income, shift your immediate attention from getting extra vacation leave to building extra savings, with a longer term goal of more time off.)

## The Exception to the Rule

In most cases, requesting leave without pay is the most expedient path to approval of two added weeks off during the year. **The exception? Try bonus time.**

Do you have a performance bonus or a year-end bonus coming? Before the actual payout, make your request to trade part of your bonus for two added weeks of vacation time. For example, if your bonus represents 10% of your annual salary, take 4% of it in vacation time and the remaining 6% in dollars.

*Thank you. I appreciate your recognition of the value I'm bringing to the job. This may surprise you, but I'd like to make a request for something in lieu of the bonus [or replace a portion of the bonus]. May I? [Manager responds.] I would appreciate having [part of] my bonus in the form of paid vacation days in the coming year. By my calculation, that would be # days. Could we arrange to make that [partial] substitution for my performance bonus?*

If the bonus trade-off is not an option for you, let's get back on the LWOP path to making your extra vacation leave request.

## **Make the Request**

So far, you've determined the number of extra vacation leave weeks to negotiate and the most expedient path to getting them approved by your employer.

Of course, your manager won't be *offering* you extra vacation leave, so the next step is to make your request. Even if you feel edgy about asking, it's imperative that you follow through.

Perspective and preparation will help you overcome nervousness about asking.

## **Get Perspective About Your Request**

Taking leave without pay (LWOP) for a vacation is probably an out-of-the-ordinary request from your manager's point of view. But let me encourage you about the likelihood of getting your manager's consent by comparing it with requests for alternative work schedules.

Since going online with WorkOptions.com in 1997, I've seen thousands of professionals get agreement for an out-of-the-ordinary (for their manager) flexible work arrangements. (And many were [the first to get a flexible schedule where they work.](#)) Here's why:

Turnover of employees is time-consuming and costly. A smart manager would rather avoid the painful process of losing a proven performer than recruit and train a replacement. (Flexible schedules are the number one driver of employee retention.)

So it's easier to forge a solution by having the employee work say, four days a week, than none at all because s/he left to go to another employer. So granting flexible work becomes a savvy management strategy. That's what I've seen over and over again.

## Your Extra Vacation Leave Leverage

Your negotiating leverage is probably better than you think it is. Keep in mind, [a written proposal outlining the business case for the request](#) was presented when requesting a flexible work arrangement. For extra vacation leave, you're going to do something similar, yet simpler and shorter, using a memo. We'll get to it in a minute.

But the same premise applies: It's better to retain you as a productive, engaged employee for 47 weeks a year (assuming three weeks earned vacation leave + two weeks of LWOP vacation leave) than to have you zero (0) weeks because you left to work where you can get the time off you want (or to retire).

As a reliable baby boomer employee with years—um, *lots* of years—of experience, and one who has established your value by contributing to departmental goals, you're in a solid position to make a reasonable request for a couple added weeks off during the year. **So ask.**

## Preparation Helps Seal Success

Thorough preparation reflects intensity of purpose and desire. Even managers who claim to be rational weigh decisions on some emotional level.

You're more likely to get agreement by supplementing your well-rehearsed petition with a well-crafted memo, printed and signed.

It's a simple yet high-impact way to convey the seriousness and strength of your petition for the added weeks off.

## Timing Tips

- Ask for the added time only if you've worked long enough with your manager to gain his or her trust and respect for you as an employee. You know, those qualities I mentioned above: reliable and productive, with well-established value to your department.
- If want both [Fridays Off](#) and Extra Vacation, aim for getting agreement for the added vacation weeks off *first*. Then ask for Fridays Off after a reasonable time period. (Knowing your manager and circumstances, you're the best judge of "reasonable"). There will probably be less resistance to accepting your proposals in that order.

**Exception:** if you plan to [redesign your position into job sharing](#), do that first; answering questions about work coverage during your vacation is easier if a job partner is in place.

- Ask after you've completed an important project that made the boss look good. Or you might have more negotiating leverage if you make your request as you're *nearing* the completion of a project. It highlights your value.
- Ask at the end of your annual performance review, assuming it's favorable, of course.

## **The Extra Vacation Leave Memo Template for Boomers**

Your choice of words is crucial. Preparation includes precision. For example:

- How do you request more vacation time without sounding like a slacker?
- How do you highlight your many years of experience without sounding *old*?
- How do you present your case with confidence, yet without sounding presumptuous?

The Boomers' Extra Vacation Leave Memo Template I've crafted for you below addresses those three issues.

This isn't a one-size-fits-all memo. *You* know how best to approach your manager, so go ahead and tweak it.

Make it sound like your voice. Use a tone which reflects your employer's culture (e.g., its degree of formality) and the nature of your working relationship with your manager.

### **Note how certain words and phrases are used to position your request:**

I suggest using the term *supplemental* vacation leave, to distinguish the request from your *earned* vacation days off.

No matter what your vacation plans are, say "outside interests" instead of "leisure interests" to temper any tone of too much fun while others are slaving away at the office.

I've used "active, engaged, explore." Makes you sound young and adventurous, doesn't it?

A slightly more formal tone than you usually use helps to convey the seriousness of your intent.

**The Extra Vacation Leave Memo Template for Boomers is on the next page.**

**DATE:**

**TO:**

**FROM:**

**RE: Supplemental Vacation Leave Request**

As a seasoned [nature or name of job position], I have a wealth of knowledge that continues to prove useful in my current position. Even with [#] years of experience behind me, I expect to be an active employee for years to come.

While remaining engaged in my work [or "profession"], I also have outside interests which I'd like time to explore, beyond my customary time off. By way of this memo, I am making a formal request for supplemental vacation leave.

As a result of my # years with [employer], I have earned # days of paid [vacation] leave per year, and am requesting a supplement of # days.

I understand this time would [may] be categorized as leave without pay. With your consent, I would submit my request according to [employer's] standard procedures.

As with any other planned leave, timing and work coverage issues would be collaboratively addressed.

Thank you for your consideration of this request. I am available for any follow-up discussion required.

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**Send me your Extra Vacation success story: [pat@workoptions.com](mailto:pat@workoptions.com)**

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