Personal Sustainability: Listening to Extension Staff and Observing Organizational Culture

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Abstract

Extension staff are increasingly challenged to do excellent work and balance their lives. University of Maine Cooperative Extension committed to a 2-year participatory action research project to support staff and to an organizational climate that encourages personal sustainability. With tools from ethnography and appreciative inquiry, staff engaged with colleagues through surveys, interviews, focus groups, and informal conversations. This article describes the richness of the process, the methodology, and the findings. Actions began early, as awareness was raised and people felt empowered. Recommendations resulting from the project address ways to support work-life balance, collegiality and connection, and staff connection to organizational vision.

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Introduction

Involved in many roles and varied programs, Extension staff work hard to help clients improve their lives. As financial challenges continue, staff numbers shrink and program priorities change. Meanwhile, the presence of technologies provides constant and instant access to work. Staff strive for excellence and at the same time often struggle with work stress and issues of life balance (Bradley, Driscoll, & Bardon, 2012; Hodous, Young, Borr, & Vettern, 2014; Kutilek, Conklin, & Gunderson, 2002). In the face of many challenges, Extension personnel want to stay motivated, optimistic, and inspired while doing the work they love (Ensle, 2005; Harder, Gouldthorpe, & Goodwin, 2014; Kroth & Peutz, 2011; Martin & Kaufman, 2013; Tower, Bowen, & Alkadry, 2011; Turkle, 2011; Young, Stone, Aliaga, & Shuck, 2013).

The leadership team of University of Maine Cooperative Extension (UMaine Extension) made a commitment to understanding how UMaine Extension staff were balancing their lives and underpinned that commitment by supporting a diverse team tasked with undertaking the Personal Sustainability Project. We, the authors of this article, were members of that team, with one author acting as the team leader. We defined personal sustainability as "working in a healthy, balanced

way today so that we can continue to do creative work well into the future." Our belief was that working sustainably contributes to a sustainable organization that better fulfills our mission and better serves the people of Maine.

The two goals of the project were to understand and support

- a successful staff that does excellent work and

- an organizational climate that supports the pursuit of work-life balance and personal sustainability.

Methods

Project Team

Extension staff were selected and invited to join the project team by the team leader. Selected staff were chosen because they were philosophically or programmatically aligned with exploring personal and organizational sustainability, believed that their involvement would be meaningful, and had a desire to make a difference and contribute to the sustainability of colleagues and UMaine Extension. Consideration was given to gender, programming area, job classification, and geographical representation in selection of the project team. Potential members were personally invited to participate, and those with interest and availability committed to participate.

The project team was made up of 11 members representing diverse aspects of Extension: faculty, professional, and aide and support staff roles; areas of programming; gender; and geography in the organization. Team members committed to investing 2 years of their time to the project, and the administration supported staff in participating and approved mileage reimbursement for in-person meetings.

The project team met for the first time in February 2012, with the director of Extension, to discuss the purpose of the project and to get to know each other. We learned together about participatory action research, ethnography, and appreciative inquiry, three methodologies explained in the Theoretical Basis section below.

Organizational Context

The project duration was a time of change, creating a dynamic backdrop for the research:

- Funding cuts resulted in significant layoffs in our Eat Well nutrition program with the loss of Supplemental Nutrition Assistance Program funds to UMaine Extension.

- UMaine Extension received an unprecedented 9.4% cut from the University of Maine.

- Forecasts predicted challenging fiscal years to come, creating a climate of increasing anxiety about future program and staff cuts.

Theoretical Basis

The project team was committed to a process of discovery, using a number of qualitative research methodologies. We began without a firm hypothesis, instead using the stories of our colleagues to inform the findings and themes as the research unfolded. Through qualitative research and observational methods, we wanted to explore what was already successful in the organization and what needed to be changed and could be changed positively.

We used a grounded theory approach that allowed for an exploratory design:

- Participatory action research was a methodology well suited to exploring our questions; encouraging reflection, self-awareness, and dialogue; and supporting individual and collective empowerment and actions to effect organizational change (Havercamp, Christiansen, & Mitchell, 2003; McIntyre, 2008; Tritz, 2014). We explored how our questions as members of the group could lead to conversations and whether those conversations would lead to action.

- Ethnography was incorporated by the process of the team's starting with observations from within the organization at each team meeting. Observations were regularly noted and recorded and used to inform the mixed methods (interviews and surveys) as the project evolved. The project team recognized that we were a part of the organization we were studying, and ethnography helped us observe our organizational culture and see things that were subtle or obvious but may have been otherwise unnoticed (Schwartzman, 1993).

- Appreciative inquiry supported our focus on our strengths and the positive core of the organization —our collective values, spirit, and wisdom. It reminded us that conversations, dialogues, and interviews were the heart of our process (Whitney & Trosten-Bloom, 2010).

These three methodologies guided our grounded theory development that emerged from the guiding purpose of the project: to examine and understand the sustainability of the organization at the individual and system levels. They helped us create a process whereby we could learn about how individuals were doing, what was working well, what was challenging, and how the organization might better support personal sustainability. The approaches provided methods for conversation and dialogue about topics not typically discussed and made visible some less visible parts of organizational culture, helping the project team gain insights and consider recommendations to strengthen UMaine Extension.

Design and Instruments

Online Survey

An electronic survey contained closed and open-ended items and took approximately 20 minutes to complete.

Focus Group Protocols

Focus group questions were designed for focus group participation by any interested staff member. In response to demand, four focus group sessions were offered during summer/fall 2012.

Interview Protocols

In-depth interviews were conducted with anyone interested in speaking at length about issues of personal and organizational sustainability during summer/fall 2012. Thirty-two interviews were conducted by members of the project team.

Participants

In July 2012, all staff (N = 216) were invited via email to participate in an optional online survey. Upon completion of the survey, respondents were invited to continue participation through an interview or a focus group.

The online survey was completed by 108 staff members (a 50% return rate). It was completed by 16 men, 72 women, and 20 people who did not specify sex. Of the 83 participants who provided their job classifications, 30 (27.8%) were faculty, 23 (21.0%) were program aides, 4 were administrators (this number represents 3.7% of respondents but 100% of administrators), 15 (13.9%) were support staff, and 11 (10.2%) were professionals.

Focus groups and interviews were anonymous with respect to job classification, years on the job, and gender. Ten focus group sessions were held with 55 people, and 32 interviews were conducted.

Results

Surveys were analyzed for descriptive data and open-ended responses. The open-ended survey responses were coded by themes, as were the focus group and interview responses. All qualitative responses were coded by at least two members of the project team. Ongoing conversations with staff formed the iterative process that led to new questions and insights, contributing to the data as part of the participatory action and ethnographic processes, as early actions led to changes in the organization during the project's duration.

The theme of our March 2013 all-organization meeting was "personal and organizational sustainability." At that meeting, preliminary findings were shared in a keynote presentation that generated small-group and informal conversations that became part of the iterative process of data collection.

The results were disseminated internally beginning July 2013 via a publication called *Project Notes*. This publication was sent out twice a month via email to all staff. Editions of the publication were short, informative pieces designed to give staff the opportunity to digest small bits of the research results over time. *Project Notes* included research findings, quotes from staff, actions to be considered both by individuals and by the organization, links to articles, and descriptions of opportunities for self-care. Our hope was that editions of *Project Notes* would encourage staff to think often about how they were doing and to consider new ways to work and to talk with colleagues about relevant issues.

In September 2013, the project team presented a research poster at Extension's Galaxy Conference.

Final recommendations were synthesized in a final report that was distributed to staff in September 2014.

Survey

The following data resulted from the survey (108 surveys, 50% participation):

- The majority of respondents (82%) reported being moderately to very satisfied with their jobs.

- Sixty-four percent reported being moderately to very satisfied with the number of hours and the way they work.

- Eighty percent reported that the way they work felt healthful most of the time.

- Fifty-six percent felt very comfortable asking for adaptations to work schedules to meet personal needs.

The following views emerged from the open-ended questions in the survey, interviews, and focus group discussions (32 interviews, 55 participants in 10 focus groups):

- Staff are very committed to the organizational mission and value the ability to make a difference in people's lives.

- Staff value and appreciate supportive colleagues and supervisors, job benefits, and the independence, autonomy, variety, and creativity of their jobs.

Themes

Work-Life Balance

The data showed that some staff were healthfully balancing their lives and that some were stressfully overworking. Those who were balancing their lives successfully sometimes expressed insecurity and wondered whether doing so was really okay. Many indicated that we have an organizational culture of working too much, overachieving, and talking more easily about being "too busy" than being in balance.

Collegiality and Connection

Some staff felt isolated and disconnected as individuals and programmatically. Many described "program silos" and working alone much of the time.

Connection to Organizational Vision

Staff saw a real connection between personal and organizational sustainability. And as the world around Extension changes quickly, staff indicated wanting to feel more connected to the organizational vision and strategic plans.

Recommendations

The project team considered ways that organizations change (Leuci, 2012; Schein, 2010) and explored the data from interviews, observations, and surveys. We recognized the importance of leaders' taking key actions, modeling change, and rewarding new behaviors. We also knew that when individuals take responsibility for changing attitudes and behaviors, ripples do spread.

These factors challenged us to imagine new ways to

- commit to individual actions for our health;

- balance personal sustainability with excellence and accountability;

- build relationships, program connections, and community; and

- connect our work to a sustainable organizational vision and structure.

Recommendations came from action, the literature, and feedback from programs that started during the course of the 2 years of the project. They emerged from the realities of the funding crisis and conversations over the 2 years.

We encouraged everyone to consider his or her role, spheres of influence, and capabilities. As illustrated in Figure 1, personal and organizational sustainability are interrelated, tied together by strong connections. Sustainability depends on actions and decisions at the organizational and personal levels and through connections with self, colleagues, clients, and organizational vision.

Figure 1.

Relationship Between Personal Sustainability and Organizational Sustainability

Recommendations based on the results of the project fall into six overarching areas of action. Strategies or details related to each area of action are described below.

Supporting Work-Life Balance

- Take personal sustainability and health seriously. Commit to action.

- Slow down. Reflect on how you are and what you need. Reach out. Support one another.

- Consider what boundaries, between work and home, work best for you. Know your limits. Talk about them.

- Check your tendencies toward perfectionism and overachievement.

- Reflect on your habits and use of technology.

- Reevaluate limits on off-hour availability to clients, colleagues, and email correspondents.

- Pay attention to the breaks you need and vacations you take.

- Operationalize "what is enough?"

- Strengthen skills in saying no, setting limits, letting go, and delegating responsibilities.

- Be a role model for healthful limit setting and work-life balance.

Investing in Connection and Community

- Talk about relevant issues and ways we can collectively support a healthful, balanced life.

- Consider how we can empower behaviors aligned with our work-life balance values. Positively recognize and reward new behaviors.

- Foster connections beyond roles. Add check-ins to meetings.

- Change the tone of conversations.

- Invest in positive relationships with colleagues.

- Avoid using email to resolve conflicts. Pick up the phone more often. Assume best intentions from others.

- Start something. Organize a lunchtime walk or a group to share strategies. Contribute ideas to the staff development committee.

Investing in Collaborative Programming and Colleagueship

- Support team building within work groups and organization-wide.

- Consider new ways to use technology for updates, program sharing, and staying connected.

- Use internal expertise for team building, facilitation, strategic visioning, and stress management.

Supporting Supervisors to Develop Their Effectiveness in Building Positive Relationships and Addressing Sustainability Issues

- Support setting healthful boundaries along with accountability and excellence.

- Support clear job descriptions. Operationalize "what is enough?," setting limits and winding down programs, and so on.

Supporting Connection to the Organizational Vision, Mission, and Structures

- Continue all-staff conversations so that all staff can understand strategic program/staffing plans.

Encouraging a Culture of Leadership to Sustain This Work Moving Forward

- From the beginning, staff were encouraged to take action. This is the nature of action research. As awareness was raised, some staff immediately felt empowered. They reflected, had insights, and began new conversations. Some took small steps to improve their situations. Some shared links to interesting articles and videos. Some collaborated on new programs:

  - A stress reduction workshop series for Extension employees was offered via technology.

  - Staff development workshops titled "Having and Handling Difficult Conversations" and "Supporting Collegial Connections" were held.

  - "Thirty Minutes of Your Life," bi-weekly staff development training and information updates, began via technology.

  - All-organization updates and listening sessions with the leadership team were held to help all staff stay engaged with changing fiscal realities.

  - Faculty approved an annual peer recognition and award process.

Conclusion

When we began the Personal Sustainability Project in 2012, we knew we wanted to engage the whole organization in a positive change process to support both excellent work and life balance for staff and an organizational climate that affirms such balance. We hoped to create an environment in which everyone could contribute to creative solutions and feel responsible for helping create the organization we want.

Two-plus years later, we concluded the project. The use of participatory action research, ethnography, and appreciative inquiry contributed to a rich, interactive process. The project team engaged with colleagues and listened to one another's stories. We stimulated thinking. People engaged in different ways. Many took risks and talked about things they had not discussed before. Many connected with colleagues in new ways, beyond roles. The term *personal sustainability* is now part of our Extension vocabulary. We reaffirmed our personal sustainability values.

Organizational culture change takes time. We hope we have started ripples of conversation and inquiry that will continue.

Acknowledgments

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