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## Exploring the Effectiveness of a Retreat Method for Extension Staff

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## Exploring the Effectiveness of a Retreat Method for Extension Staff

### Abstract

The California 4-H Association hosted two retreats to support its members with goals of balancing professional development with intentional relationship building. Evaluations demonstrated that staff found the intentional balance of time spent in unstructured, semi-structured, and structured time offered opportunities to grow professionally while building relationships with peers. Follow-up surveys found that 4-H professionals strengthened their network of peers to rely on in their work. Future work for professional development may benefit from a social capital lens.

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## Introduction

Professional development in Extension focuses on skill building in competency domains, such as the 4-H Professional Research Knowledge and Competencies ([PRKC] Diem, 2009; Heck, Subramaniam, & Carlos, 2009; Stone & Rennekamp, 2004) often through the use of conferences, workshops, and individual learning courses. Frequently overheard during these structured professional development events is the desire for and value of "hallway" conversations in building relationships (e.g., Robinson, Smith, & Segal, 2014).

One approach to capitalize on relationship building is having a retreat, allowing for a period of time to reflect and learn from peers in more relaxed settings. Retreats allow staff to step away from their daily responsibilities and see their work through a broader lens. Retreats are often held in non-traditional settings especially useful to develop and strengthen relationships with colleagues who work in the same Extension discipline but are spread throughout a large geographical area. While there is research on the effectiveness of the retreat method on Extension clientele (e.g., Lesmeister, Green, Derby, & Bothum, 2012; Maginnis & Boeckner, 1996), less is written on the use of retreats

for Extension employees themselves.

This article explores whether retreats, organized by a professional society, would be effective for dual goals of professional development and building relationships.

## Retreats Hosted by the California 4-H Association

Similar to other state Extension systems, California Extension continues to rebuild after a wave of retirements. New relationships, mentorships, and support groups must be forged to help the new era of 4-H professionals be successful in their respective roles; yet there has been limited support for its development. While state-organized events occur annually, these meetings are typically structured around defined learning objectives, initiatives, and state priorities addressing staff professional development and are not designed to deliberately support relationship building; in other words, they are conferences and not retreats. In recent years, California 4-H staff have rarely and only sporadically interacted in-person, other than state-organized events, and had no intentional opportunities to build supportive relationships.

The California 4-H Association (CA4-HA) is a professional society for 4-H youth development professionals committed to advancing the 4-H professional status and encouraging professional improvement. Using the PRKCs as a roadmap and incorporating both constructivist and social learning principles (Merriam, Caffarella, & Baumgartner, 2007), CA4-HA embarked on a mission to support its members through retreats with goals of balancing professional development through intentional relationship building.

In May 2014, a 3-day retreat was held in a Northern California coastal location, attended by 29 4-H staff guided by the theme, "Who has the time? Success as a 4-H Professional." In May 2015, another 3-day retreat was held in a Central California coastal location, attended by 47 4-H staff guided by the theme, "Don't Go It Alone: Collaboration as a Pathway to Success as a 4-H Professional." Retreat participants included both state- and county-based program staff (72% of attendees, both years) and academic appointments (28% of attendees, both years). In 2014, 45% of attendees had 10 or more years of service while in 2015, this shifted such that 47% of attendees had fewer than 4 years (Table 1).

**Table 1.**  
Staff Appointments and Years of Service

Retreat Year	2014		2015	
	n	%	n	%
Academic Staff	8	28	1	2
Program Staff	21	72	46	78

Years of Service				
0 – 3 years	1	3	2	4
	0	4	2	7
4 – 9 years	6	2	1	2
		1	1	3
10 or more years	1	4	1	3
	3	5	4	0

## Exploratory Evaluation

The retreats intentionally balanced a combination of unstructured time for social networking to build relationships, semi-structured activities around practical topics for peer-to-peer collaborative learning, and structured learning opportunities facilitated by experts for skill building. The retreat structure built on adult theories of learning, with attention to the participants, the context, and the processes, to accomplish both skill and relationship building (Merriam, Caffarella, & Baumgartner, 2007).

To assess the effectiveness of the retreats, the same post-survey was administered at the conclusion of each retreat (in 2014: n=25, 86% response rate; while in 2015: n=38, 81% response rate). The survey asked attendees about retreat format, overall retreat evaluation, and open comments.

For retreat format, participants were given a 3-point scale (More, About the Same, Less) and asked, "In future retreats, how much of these three would be valuable (helpful or useful)?" The first format was unstructured time focused on relationship building (e.g., long breaks & meal times, free evenings). Another format was semi-structured time targeting peer-to-peer collaborative learning (e.g., roundtables, open-space technology). The last format was structured sessions, which were primarily expert-driven skill building around the PRKC framework (e.g., sessions on equity, curriculum implementation, program development, evaluation). Overall, we found that a combination of all three formats worked for participants regardless of year (Table 2). For the 2014 retreat, the majority of respondents wanted "about the same" amount of time for each type in future retreats. For 2015, a majority wanted "about the same" amount of time for semi-structured (79%) and structured (67%) activities, but they wanted "more" (53%) unstructured time in future retreats.

**Table 2.**  
Value of Retreat Format

<i><b>"In future retreats, how much of these three would be valuable"</b></i>		
	<b>Semi-</b>	<b>Structured</b>

<i>(helpful or useful)?"</i>	Unstructured time (%)	structured time (%)	sessions (%)
2014 Retreat (n=25)			
More	17	13	4
About the same	83	87	87
Less	0	0	9
2015 Retreat (n=38)			
More	53	21	0
About the same	44	79	67
Less	3	0	33

Overall retreat satisfaction was measured with a five-point scale (Strongly Agree, Agree, Neither, Disagree, Strongly Disagree) asking participants about retreat satisfaction, future attendance, recommendation, networking, knowledge gain, and session satisfaction. Regardless of year, we found positive overall retreat evaluation results with every question having at least 90% or more agree or strongly agree (Table 3). No one selected "Disagree" or "Strongly Disagree" for either year. In addition, almost all participants responded that they enjoyed time to build relationships, socialize, and have informal conversations, and they learned about success as a 4-H professional.

**Table 3.**  
Overall Retreat Evaluation

Question	2014 Retreat				2015 Retreat			
	Strongly Agree (%)	Agree (%)	Neither (%)	Mean (SD) *	Strongly Agree (%)	Agree (%)	Neither (%)	Mean (SD) *
I was satisfied with the retreat.	88	12	0	4.88 (0.33)	50	47	3	4.47 (0.56)
I would attend the retreat again.	88	12	0	4.88 (0.33)	60	32	8	4.51 (0.65)
I will recommend the retreat	88	12	0	4.88 (0.33)	63	26	11	4.53 (0.69)

to colleagues.								
The retreat provided an opportunity to network, meet, and socialize with colleagues.	84	16	0	4.84 (0.37 )	61	32	8	4.53 (0.65 )
Overall, the retreat was successful in its goal of helping me learn about success as a 4-H professional.	88	8	4	3.84 (0.47 )	38	54	8	4.30 (0.62 )
* Responses converted to 1=Strongly Disagree, 2=Disagree, 3=Neither Agree nor Disagree, 4=Agree, 5=Strongly Agree								

Evaluations were reviewed and several open-ended comments representing general opinions regarding the Retreat are shared below. In 2014, participants said the following.

- "The most valuable aspect was the relationship building with colleagues. There are very few opportunities to get together with 4-H youth development professionals." – 4-H Youth Development Academic Advisor, 16 years of service
- "The focus on relationship building. When we're in our counties we can feel so isolated, but the conversations and friendships that developed here will continue on." – 4-H Program Staff, less than one year of service
- "The balance between structured activities, breaks, planned meals and meals out. The flow of the event went well....It really pulls you away from the everyday office life and more relaxing and stress relieving than a typical conference." – 4-H Program Staff, two years of service

In 2015, participants said the following.

- "What worked well was shared information-opportunity to share in a fun way, learn and share practical 'rubber meets the road'." – 4-H Youth Development Academic Advisor, 17 years of

service

- "Nice to network with colleagues at a relaxed atmosphere not at a state learning environment." – 4-H Program Staff, one year of service
- "Enjoyed the opportunity to network with and learn from my colleagues." – 4-H Youth Development Academic Advisor, two years of service

## Impact of the 2014 Retreat

We conducted a follow-up evaluation 10 months after the 2014 retreat to assess its impact. The survey was emailed to 24 people (five had since retired or left their 4-H positions), and 18 completed the survey (75% response rate). Reflecting back, 72% of respondents agreed or strongly agreed that the retreat helped them build skills useful for their work with 4-H (mean=4.07, SD=0.59), and 94% agreed or strongly agreed that the retreat helped them develop relationships with colleagues (mean=4.56, SD=0.62). Respondents shared how the retreat affected their work as a 4-H professional. A majority talked about having strengthened their network of peers to rely on in their work as 4-H professionals. A 16-year academic professional shared, "As a result, I reached out and communicated with folks I met, some resulting in collaborative work, I consult with my peers more as resources, and I reach out more to the newer advisors in an effort to foster teamwork." Other respondents described new tools they've implemented, such as formative evaluation, developing cross-county tools, and engaging teens in new ways. A 10-year staff member summarized the impact of the retreat, "This retreat not only enabled me to better get to know my colleagues in both a professional and social setting, but also gave me valuable tools to help improve my own program."

Finally, the association held another retreat in 2015 where 21 participants returned for a second year (88% return rate; 21 from the 24 eligible staff who participated in 2014), and an additional 26 staff attended the retreat that had not the year previous (62% increase). Continued engagement in an activity may be indicative of its perceived benefit or value, so the high return rate of staff is a positive sign that staff saw a benefit to their work because of the retreat.

## Implications

The retreats were successful in their two primary goals: balancing professional development and intentional relationship building. Attendees were positive about the retreat format in helping them become successful in their Extension work. We believe this to be the result of time spent in unstructured, semi-structured, and structured activities, which offered a balance of professional development and relationship building activities. The unstructured and semi-structured times enhanced the professional development experience by providing opportunities for intentional sharing and relationship building in a comfortable and safe environment; e.g., "thinking out loud," "thinking out of the box," and "campfire" sharing of ideas. This differed from a conference format where participants would spend most of their time in structured sessions. Given these early evaluation results, efforts are underway to expand semi-structured formats, such as Open Space Technology (Owen, 2008), to empower participants to discuss and address complex issues through

self-organizing and shared leadership.

## Recommendations

A new finding for this work is that hosting retreats may be a unique contribution for Extension professional associations (e.g., NAE4-HA) to provide their respective Extension staff opportunities to build practical skills while strengthening social connections to ultimately improve job performance and organizational effectiveness. Whereas state-driven efforts tend to be guided by specific program or workforce priorities, associations of professional peers may have more flexibility in designing experiences, like retreats, that provide opportunities for relationship building and ultimately strengthening social capital.

Future research on professional development for Extension staff may find a fruitful pathway in taking a social capital lens. Reform models of professional development (e.g., communities of practice; see Smith & Schmitt-McQuitty, 2013) place an emphasis on collaborative learning environments and the deepening of relational bonds—in short: building social capital between participants. Research suggests that strengthening social capital for staff within an organization improves productivity and organizational effectiveness (Andrews, 2010). In our work, we have positioned relationship building—the deepening of connections (structural), trust (relational), and cognitive (shared goals and values) dimensions—on par with skill building. Our belief is grounded in the context of Extension, where our work often places us as community collaborators and connectors, a role that requires us to act as builders of relationships and connections.

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