

# Corporate-Community Co-Development: A Case Study Research Report



March 3, 2023

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## Executive Summary

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Evidence from internal survey analysis indicated that 99% of those that attended the Learning Program believed the experiences enabled employees to build relationships with one another. Similarly, 93% strongly believed the Learning Program enhanced their ability to make a positive impact on their team. Over 90% of those that attended the Learning Program strongly believed it was a worthwhile investment in their wellbeing and career development. And relative to non-participants, those that participated in the Learning Program increased their sense of connection to the corporate culture and their job satisfaction. But why? And how can that success be transferred, sustained and leveraged in the future?

We conducted analysis of open-ended comments on corporate surveys, together with interviews, observations, and testimonials from both corporate employees and non-profit partners. This revealed four key mechanisms for the success of the Learning Program. Each of these mechanisms represents a means of navigating tensions that characterize the modern workplace: (1) establishing connections by balancing belonging and uniqueness, (2) enhancing thriving by balancing cognitive growth with physical vitality, (3) increasing openness by balancing vulnerability with psychological safety, and (4) embracing uncertainty by balancing the structured with the unstructured.

We address each of these tensions and balancing mechanisms in the pages that follow, illustrating them in participants' own words. For each, we provide concrete action recommendations for companies and non-profits to enhance corporate and societal well-being. We conclude with a guide for corporate-community partnerships which establishes a timeline and step by step process by which companies and non-profits can create more effective partnerships and dramatically amplify the social impact achieved.



*Image: These trees are here to stay. Getty Images Plus*



## Data Collection and Analysis

We gathered rich comprehensive textual data from a variety of sources (see Table 1). Data analysis consisted of four major phases: (1) coding the data by assigning labels to statements and comments, (2) sorting and grouping codes into related categories, (3) synthesizing categories into major themes, and (4) extracting meaning and implications for action.

The Appendix contains sample comments illustrating each code category. All four researchers were involved in data collection and analysis, which enabled discussion, debate and re-interpretation among the team to arrive at consensus regarding the key findings.

Data source	Number	Volume
Text responses from Study Group employees on open-ended questions in 2022 [Learning Program] Survey	877 employees	4130 comments
Text responses from Study Group employees on open-ended questions in 2022 on 90-day post-[Learning Program] Survey	202 employees	344 comments
Direct observation of the Learning Program sessions in January 2023	3 cohorts over 5 days by 3 researchers; total of 386 hours	35 single-spaced pages of field notes
Interviews with Study Group employees in 2023	17 interviews; total of 12.75 hours	221 single-spaced pages of transcript
Interviews with non-profit partners in 2023	8 interviews; total of 9.5 hours	125 single-spaced pages of transcript
Prior reports generated by Study Group researchers based on numeric survey responses and white papers prepared by other academics	4 Reports	33 pages

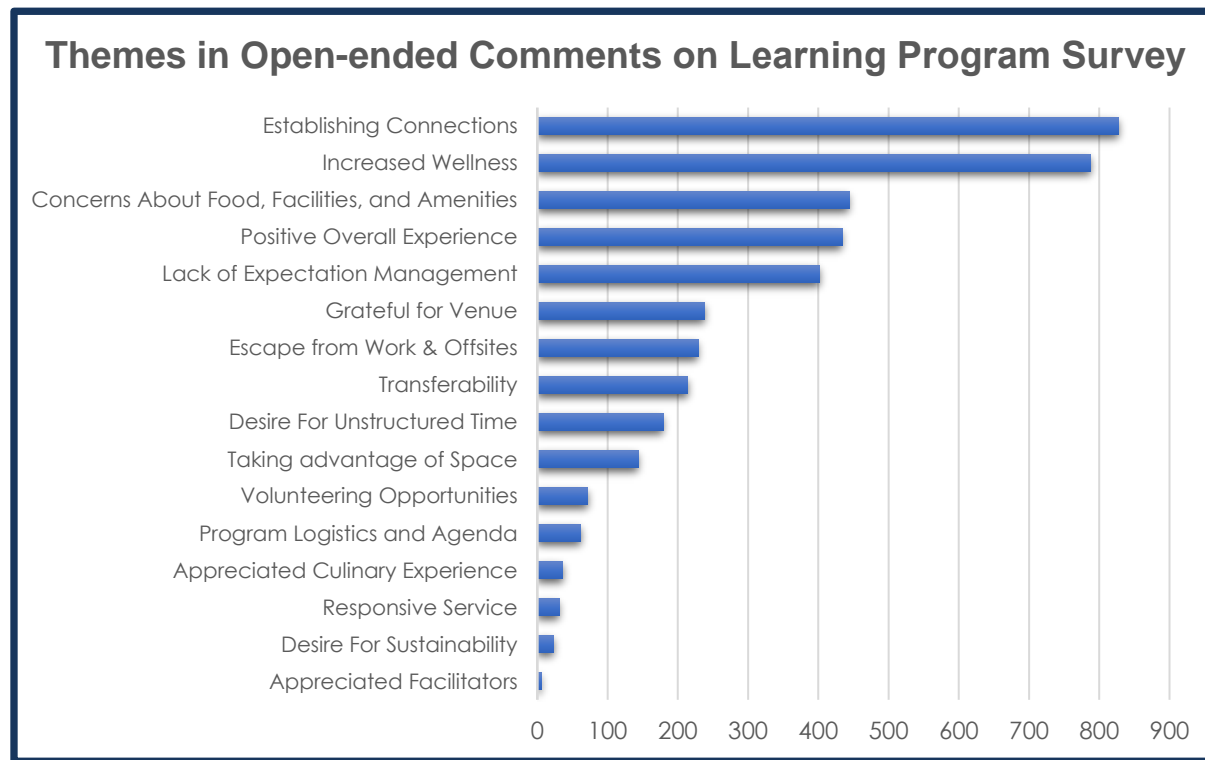
Table 1: Sources of Data

## Findings

### Establishing Connections: Navigating the Tension between Belonging and Uniqueness

The single most frequent theme expressed in the data was that being at the Learning Program helped to establish a greater sense of connection. This was expressed in 20% (828/4130) of all comments in

response to the open-ended questions on the Learning Program Survey. This corroborates prior reports indicating that the Learning Program helped to solidify an important component of the Study Group's culture.



## Establishing Connections: Navigating the Tension between Belonging and Uniqueness

Yet, most people have an innate desire to attain *both* a sense of belonging within social groups *and* a sense of individuality. In fact, social psychologist Marilyn Brewer has argued there is an inherent tension between establishing connections and maintaining one's sense of uniqueness. She posits the idea that humans attempt to achieve 'optimal distinctiveness,' balancing the amount of uniqueness exhibited to retain characteristics that promote belongingness and connections to the group (Brewer & Pickett, 2014). Essentially, everyone wants to fit in, but no one wants to get lost in the crowd.

This principle of optimal distinctiveness is central in understanding the effectiveness of diversity, equity and inclusion initiatives, and has been applied to studies of group bias and prejudice (Brewer et al., 1993); political identification (Brewer, 1999); belief consensus (Simon et al., 1997), and more recently to the study of how best to lead diverse organizations (Randel et al., 2018) and how to mentor across races (Randel et al. 2021).

Importantly, our analysis revealed that one mechanism explaining the success of the Learning Program is that the setting and programming helped participants to balance the dual needs for

belonging and uniqueness, in order to achieve this 'optimal distinctiveness.' This is a remarkable accomplishment. For example, Study Group participants said,

*"During my few days at the Learning Program, I felt like \*I\* was special. In a company the size of [our organization], I don't know of any other or better way to accomplish that."* [ID300]

*"This was an amazing experience and something each and every employee at [our organization] should have an opportunity to experience. I know logistically this would be very challenging, but there's no substitute for person-to-person interaction and being able to speak in an open and transparent way about what I think and feel, and about how our lives are impacted by the company and the new way of work."* [ID584]

*"[This program was an absolutely fantastic experience. Just to be able to regroup with individuals, and revisit our [organization's] core values, and our own values was an enlightening experience, that allowed me to connect within myself too. The sessions in the evening (especially Sound Healing) were an experience within*

**Establishing Connections:** Navigating the Tension between Belonging and Uniqueness

*themselves, and I am so glad I had the opportunity to try something new. These few days have helped with my tranquility and mental wellbeing.” [ID692]*

Many of these same experiences were communicated in the final sharing at the outdoor Cathedral at the end of the Learning Programs session:

*“What I tried to tell everyone is that I care about everything that you say, I care about your voice. I care about all of your messages. And I really care about being here, being able to share my voice and to share my messages with you.” [ID1144]*

*“I think what you've done for me, is helped me realize I am not alone in this journey, or this feeling and that you have given me the power, I believe, at least right now, to take this uncertainty and be courageous. To understand that there is value in all of these connections and the experiences I've had.” [ID1118]*

*“So, I think just being here has helped me to know myself a little better, and to know my values. The other thing is, I want to build a*

*community, establish new and nurture existing relationships. And this whole experience has been all about that. And it's really reinforced to me that I value sense [sic] of belonging and connection. And then in this life of ups and downs, just having your tribe and your community to support you is so important.” [ID1134]*



*Image: Courtesy of 1440 Multiversity*  
<https://www.facebook.com/1440multiversity/photos>

## **Establishing Connections:** Navigating the Tension between Belonging and Uniqueness

Participants felt that the Learning Program retreat resulted in stronger and more authentic bonds than other team-building events such as team lunches or team karaoke. One participant said:

*"We go to team lunches, we go to team karaoke, we go to all these events, but still I overheard some managers saying, 'I don't have this similar bond with my team compared to the relationships I have built here.' A common theme based on my observation... was that here first we are intermingled with different teams. We are cross functional teams; we are working with different people. So having that space, we are all doing some shared activities, and just the fireside chats enabled us to listen to what other people are going through."* (ID1120).

Others shared,

*"I'm going to be more intentional about connecting with people... don't feel shy to go up to someone and be like 'we were at [the Learning Program].' I'll be more intentional about it, if I run into you [at the office]. And then, give each other grace right now. These are difficult times. Those are my two*

*things I take away. Try to be intentional. And then give myself grace. And I challenge the rest of you to do that as well."* (ID1121).

*"Wonderful experience, I wish every employee at [our organization] could go there at least once! I feel that I was able to connect with people at a higher level while sharing the joy of being in a beautiful place, eating great food, going on healthy hikes and doing classes, sitting around the fire pits chatting while listening to live music."* [ID288]

During interviews many expressed how valuable the programming was for creating the connections and being authentic in doing so:

*"Please extend the Learning Program to allow members of the same team to connect deeply on a more personal level and spend valuable time together to innovate with no distractions. This will enhance the team productivity and motivation, which would be very valuable and relevant."* [ID304]

*"This experience was a gift. I feel a much greater sense of belonging at [our organization] and a deeper grounding in our more altruistic goals as a company.*



**Establishing Connections:** Navigating the Tension between Belonging and Uniqueness

*I loved how each session was designed to create and build authentic relationships with team members from across the company. I hope everybody is able to go through the experience, and continue to ideate on how we may bring this magic back to our daily lives.” [ID583]*

*“The best part for me was being able to interact with other teams, such as the Impact Team. They were so cool and I wouldn't have ever met them if it weren't for the Learning Program.” [ID72]*

Other quotes from the open-ended survey data pertained to the types of activities for which the Learning Program is best suited, corroborating that the retreats promote collaboration, connection, and bonding:

*“The team building was INCREDIBLY valuable. Can't think of a higher return on time spent for a team. Especially as we all figure out how to build culture/connecting in physically distributed teams. No understatement to say that was a transformative experience for our team. Our hearts are full and we are ready to tackle anything.” [ID1035]*

*“Events where the focus is collaboration, bringing people together to get to know each other as humans. If the focus is purely solving a business problem and nothing else it's a waste of an opportunity.” [ID226]*

*“I would stay away from celebration or end of work check-ins or standard check-ins. I would focus the Learning Program on the planning/designing/creating space at early part of initiatives. Get benefit of both relationship building and creating something together in a different environment. A chance to think different on a topic with a certain outcome in mind. The food and wellness and venue etc. provide enough of a respite to support rolling up the sleeves.” [ID338]*

At the same time, participants were concerned that the selection process was not as inclusive as it should be and that this could have an adverse effect on cohesion:

*“Using the Learning Program as a reward/award could defeat the inclusive and educational purpose. The Learning Program is best served as a place for collaboration and teamwork, whether that be for individuals who perform ...(continued)*

## Establishing Connections: Navigating the Tension between Belonging and Uniqueness

*similar functions, or for teams as a whole.”*  
[ID715]

*“I do not think the Learning Program should be used as another "Presidents Club" or other annual sales metric/quota celebration location. The Learning Program should be preserved for learning, wellbeing, recharging, bonding, giving back, and adventure!”* [ID335]

On a final note, participants provided useful suggestions as to how best to transfer and sustain the experiences from the Learning Program with regard to belonging and uniqueness.

One such suggestion was to consider organizing retreat sessions so that members of the corporate Employee Resource Groups are invited to attend together. Even if this is not possible, respondents suggested the ERGs could be a vehicle for revisiting and reinforcing the learnings at the Learning Program.

## Recommendations:

1. *Acknowledge the desire for team members to both belong and make unique contributions.*
2. *Engage in exercises in which participants share their personal stories to ensure that unique backgrounds are recognized, but to also identify those areas where individuals have had similar experiences or learnings.*
3. *Allow for ample time in reflection and for authentic interaction, during which individuals come to know themselves by sharing their values with others.*
4. *Conduct exercises that reveal commonalities and shared priorities; emphasize connection rather than work check-ins, standardized presentations, or awards.*
5. *Hold retreats in the early stages of a project, or at the start of a new team’s formation, to provide maximum value in terms of team-building.*
6. *Ensure that the selection process for retreat opportunities is inclusive and transparent.*
7. *Consider Employee Resource Groups as a means of revisiting and reinforcing learnings around belonging and uniqueness.*

## Enhancing Thriving: Navigating the Tension between Physical Vitality and Cognitive Growth

A second key mechanism for the success of the Learning Program is that it helped to enhance thriving, the psychological experience of both physical vitality and cognitive growth (Porath, Gibson, and Spreitzer, 2023). Vitality denotes the sense that one is energized and feels alive. Cognitive growth is about learning, gaining new knowledge, and acquiring skills.

Thriving is often elusive, with many workers around the globe reporting physical depletion and mental stagnation (Moss, 2021). Yet, meta-analysis across studies demonstrates that the combination of vitality and cognitive growth is essential – it increases health, engagement, performance, and retention (Kleine, Rudolph, & Zacher, 2019). Moreover, recent research indicates that corporate volunteering promotes thriving, as well as better informed strategic decisions in both companies and communities alike (Gibson, 2022).

We saw evidence that both Study Group employees and members of community non-profits experienced thriving as a result of the Learning Program experience. In part, this was because they experienced an energy boost. For Study Group

employees, this occurred during wellness and volunteering (VTO) activities:

*“Beyond the gorgeous campus & serene surroundings--what I appreciated most was that 75% of the time was dedicated to team building, team connection, wellbeing & mindfulness, and fun. Leading up to the onsite, I was exhausted, borderline burnt out, and feeling sapped of mental, physical, and emotional energy. After the Learning Program, I felt connected to my peers & leadership, valued by my leaders & company, energized, and inspired. It's benefits like this that make [the organization] a standout place to work, and I hope the Learning Program team considers how to make a trip to the Learning Program accessible to every employee. While I understand the investment in something like the Learning Program (and the permanent location) is not minimal, I truly believe the output of staying a few days there will pay in dividends. Productivity will increase and retention rates will improve because people will feel valued as human beings, not just employees.” [ID220]*

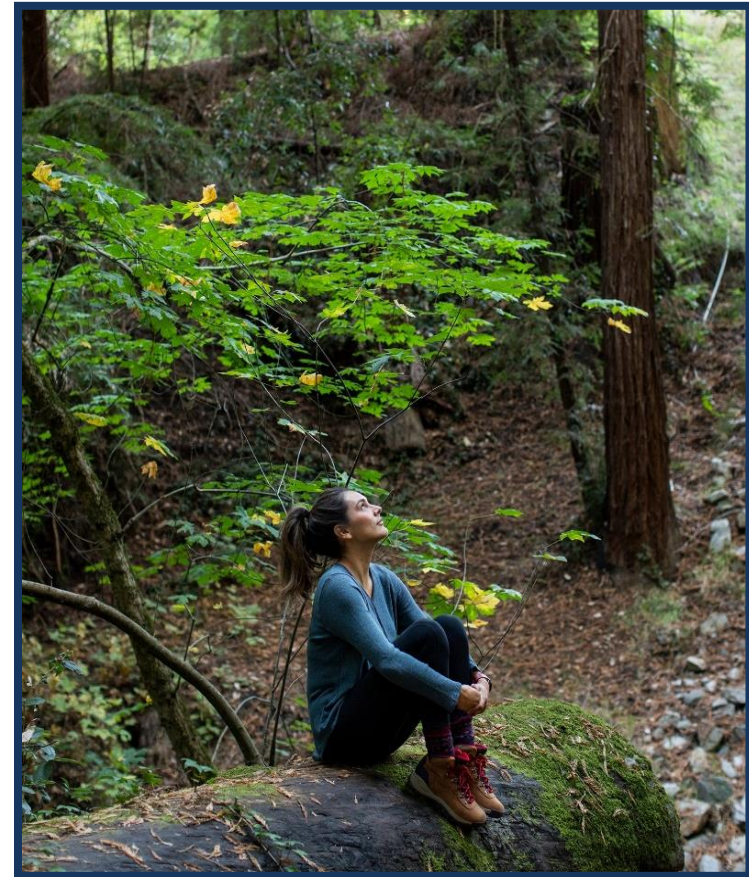
**Enhancing Thriving:** Navigating the Tension between Physical Vitality and Cognitive Growth

*"I loved the connection to VTO and well-being opportunities while at the Learning Program. THIS strongly solidified the [organization] values for me as an employee." [ID73]*

*"When the focus is too much on work, we can't recuperate. The space is so beautiful that we should all spend time outdoors and connecting with people. It is energizing and, in the end, the rest will allow us to be the best version of ourselves at work." [ID331]*

Many respondents commented that the venue itself contributed substantially to the experience of thriving. They were grateful for the 1440 campus, and emphasized that it allowed being in nature and connecting to the natural environment through hikes. Several mentioned that the absence of TVs and technology in the sleeping rooms provided a mental break. Thriving was encouraged due to the secluded location, which enabled 'being away from the bustling culture of city life.' Others mentioned that although offsite, the location was still convenient to the Bay Area and San Jose airport, such that 'it wasn't completely remote.' They appreciated the beautiful spaces, in particular the Sanctuary where yoga and other wellness activities

occurred, the large meeting spaces, and being surrounded by redwoods:



*Image: Courtesy of 1440 Multiversity*  
<https://www.facebook.com/1440multiversity/photos>



## Enhancing Thriving: Navigating the Tension between Physical Vitality and Cognitive Growth

*"I think the Learning Program – as an immersive and tranquil space unlike our physical or virtual work spaces– is best for work associated with our company values (especially trust and sustainability), concept/futures development, and personal growth and wellness. 1440 is a great partner and it is a beautiful private space with many values that complement our own."* [ID727]

In addition to being re-energized, employees participating in the Teams Connections programs reported learning about new products, technologies or service possibilities, with the physical presence and focus away from customer demands accelerating this learning:

*"The general sessions have been 'curated' by a group of managers, which included me. We were very mindful to select topics that are integrative and cross-cutting across the roles in the team, which are highly specialized. The sessions are designed to get people thinking outside the box about how to apply the skills or issues to their own role. Face-to-face interaction benefits this, so we thought it was a good way to spend (at least some) of our time together. I personally feel the balance*

*between technical sessions and wellness or connection time is about right."* [ID6000]

The Study Group participants reported learning about [its organizational] culture and services more generally, but also about themselves, about each other, and about the community:

*"What I learned as I relaxed...it was more about being honest with myself, and other people being honest with themselves, to really understand what the message was within the exercises we were doing and how to really appreciate each other. That's really what I got out of the Learning Program."* [ID331]

*"The true colors personality test is something that is still valuable to me in my day-to-day life. One of my colleges and I often refer to our true colors and have found it very beneficial to our working relationship."* [ID 533]

Important learning also occurred regarding the constituents being served and the important social change initiatives being pursued by the non-profits. One non-profit partner described this:

## Enhancing Thriving: Navigating the Tension between Physical Vitality and Cognitive Growth

*"The [organization] volunteers really met him [our disabled employee] where he was at. And if they weren't people who felt comfortable doing that, they witnessed other people from their company doing that. Which is much of what we're trying to be about here, sort of humanizing people that most people would rather not experience, because they don't have any direct experience with it, they don't have that opportunity. I think it humanized someone who could be a little scary."*

[NP0008]



Image: Courtesy of Common Roots Farm.  
<https://commonrootsfarm.org/>

For their part, members of the non-profits reported that the presence of the volunteers was energizing for the non-profit staff, putting a 'spring in their step' and providing 'relief from the grind.' The volunteers shared the workload, but also brought enthusiasm, a sense of wonder, curiosity, and laughter:

*"We have a young man in our employ who has cerebral palsy and is our groundskeeper. And he was always lit up when the groups came because he's like 'They're coming to help us, right? They're coming to help the farm! That's cool. That's so cool.' So, he loved it."* [NP0008]

*"We depend on volunteer help to get our farm work done. So, it was a very practical help to us even in those short bursts. And frankly, it makes a lot of those tasks more fun for people. And you know, when you have 3000 strawberry plants to move, it's pretty onerous when you're three staff, but when you've got a group of volunteers coming, they do it in an hour and a half."* [NP0006]

## Enhancing Thriving: Navigating the Tension between Physical Vitality and Cognitive Growth

The non-profits also reported that their trainees learned about the corporate world, careers, and professionalism:

*"My paid staff was really enjoying it. I think it's going to be really great for us. We're gonna get to tell our story. We're gonna have help. And this has really helped us hone our group skills in terms of organizing groups. They were genuinely bummed when you know, when it ended, like they really liked it. And really, I love [our Learning Program] days."* [NP0003]

When asked about what activities are best suited for the Learning Program, many cautioned against too much focus on learning, without addressing the need for energizing:

*"Nothing too loud or corporate focused. Let this be a place where folks can breathe, and disconnect, while gently tying this to the culture. I found the balance to be perfect."* [ID92]

*"Anything that doesn't take advantage of what the Learning Program uniquely has to offer should probably just be done in [the Study Group] office."*

*Capitalize on the surroundings, the integration into nature, and make a Learning Program opportunity the special thing that it is. Day long presentations with people sitting in a large room can be done anywhere."* [ID258]



Image: Volunteers at Grey Bears in Santa Cruz package food for distribution. PHOTO: courtesy of Grey Bears  
<https://www.goodtimes.sc/santa-cruz-groups-support-older-adults-during-pandemic/>

*"Any program being hosted should be able to be done outside. For a regular team offsite or business review where you need to be in front of a laptop all day, the Learning Program is not the place."* [ID82]

## Enhancing Thriving: Navigating the Tension between Physical Vitality and Cognitive Growth

*"I think it may be best to encourage participants not to engage too much in actual work during that time. Even if there is an offsite it would be nice to stay away*

*from too much corporate talk and more connection talk. The space oozes peace and connection and too much shop talk will take the magic away."* [ID1041]

## Recommendations:

- 1. Strategically select which activities will be held in off-sites and which can be handled virtually or in an office setting in order to balance vitality and cognitive growth; off-sites in natural settings are particularly well suited for re-energizing activities.*
- 2. Enhance both vitality and learning by adopting meaningful volunteer opportunities, clearly communicating the mission and purpose of the non-profits, and ensuring the volunteers understand their impact and that the non-profits truly benefit from their work.*
- 3. Emphasize that learning can be about products or services, or about culture, values and one-self; off-sites are best suited for the latter.*
- 4. Target transferability mechanisms toward incorporating wellness; while learning is more easily incorporated and transferred into one's day-to-day, activities promoting energy and vitality are not.*
- 5. Devote a component of the final session toward developing an action plan for incorporating energizing activities into one's life, including continuing to pursue social initiatives that were introduced in the non-profits.*
- 6. Consider tasking Employee Resource Groups with addressing the balance between physical vitality and cognitive growth; programs might target the enhancement of thriving.*



## Increasing Openness: Navigating the Tension between Vulnerability and Psychological Safety

A key mechanism for the Learning Program success is that it helps create a balance between vulnerability and psychological safety, in large part by taking participants into spaces they are familiar with (such as meeting rooms) and spaces they aren't (such as a redwood forest).

Psychological safety is the sense that it is safe to take interpersonal risks (Edmondson, 1999). Research has found that certain environments create a psychologically safe communication climate which is characterized by support, openness, and mutual respect. This promotes speaking up, asking questions, and admitting mistakes, which in turn increases technological innovation, because diverse perspectives are better surfaced, shared, and integrated (Gibson & Gibbs, 2006).

The Learning Program programming helped to balance vulnerability and psychological safety by taking participants out of their familiar work roles and tasks and making them more vulnerable with one another through interaction, not only on a professional level, but on a personal level. The Learning Program was comprised of both familiar and unfamiliar spaces, given sessions occurred in both indoor conference rooms and

outdoors in natural settings, and this contributed to the balancing act:

*"One of my takeaways was that people have a yearning to connect with people and be vulnerable. To expose themselves in a vulnerable way. And I felt like I heard that in conversations with people that I just met for the first time. In a couple of activities, there were very personal stories that I was hearing. It made me realize that when you're walking past someone, every single day at the office, you really have no idea what they're going through, or how they're approaching their life or their job. But if you talk to them, and in the right environment, the relationship is there. And for me, that's not something that comes naturally. But I saw that at the Learning Program, where people were actually very open and wanted to share and that's the element of relationship building."* [ID06]

*"The environment created the right space for the team to open up and create new*

## Increasing Openness: Navigating the Tension between Vulnerability and Psychological Safety

*mechanics and dynamics. Excellent authentic experience.” [ID482]*

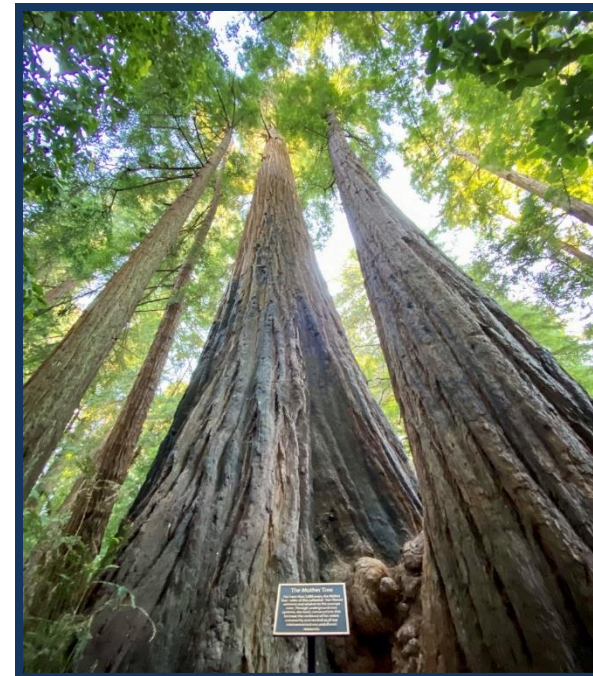
*“Work was happening while I was there, but I definitely felt like I was in an environment that allowed us to have different sorts of conversations about it. And there were moments where I realized I could take care of myself and I was not going to be judged, it was socially acceptable to go to a Tai Chi class.” [ID 227]*

Another interviewee stated that the goal of the retreat was to get together to discover what everyone’s “super strengths” were and to figure out how to operate as a newly formed team. The Learning Program enabled a much deeper form of sharing than would have been possible in the office, given that everyone was “so heads down in their projects.” As the interviewee stated,

*“We weren’t able to get that same level of sharing going in a weekly call, or even a monthly call. We’d never achieve that level of sharing that we got at the Learning Program... Because this is what you’re here to do. You’re not turning your laptop on. You’re here to share and learn from each*

*other and help build the team and form consensus. We’re not getting distracted, we’re here to be and to learn about ourselves and others.” (ID010)*

During the final sharing session of the Learning Program, which took place in the outdoor Cathedral near Mother Tree (a 1,200-year-old redwood), one participant said,



*Image: The 1,200-year-old Mother Tree. Courtesy of 1440 Multiversity  
<https://www.facebook.com/1440multiversity/photos>*

## Increasing Openness: Navigating the Tension between Vulnerability and Psychological Safety

*"The last few days, I heard stories where people took risk, they explained how they made a change in their life, with risk, and it was uncertain. They were scared. And I felt scared as well. I'm feeling that right now! But having the hope that if other people have done it, and these are the people I'm working with, I can too. So, I am feeling so much more motivated to make change."*  
[ID1120]

Vulnerability and authenticity were also achieved through wellness activities, such as movement and dance, drumming, meditation, and improvisational collaborative exercises, as well as through guided activities that encouraged reflection and supportiveness. For example, in the Healing Hands wellness activity, participants learned about acupressure and partnered up to help each other release the tension in neck and shoulders. In another activity, they danced together. Through these activities, participants came to see each other on a much more basic level as human beings, outside of their regular work roles, and came away with a shared experience that bonded them and increased trust in one another. In an interview, a respondent said:

*"I got to meet my boss's boss at the Learning Program...I think that was important. He and I made a connection and now I can ask him far more candid questions, as I know what he is like. And so, I feel like he understands my intent. And then I'm coming from a good place with a question and not just like poking at him or challenging him, which on Slack is a little hard to convey."* [ID1120]

An interviewee who participated in a Study Group retreat shortly after the formation of a new team found the experience to be vital in getting to know her new teammates. She explained that the informal setting and wellness activities helped to promote psychological safety by helping to remove social judgment.

*"I actually think the retreat was vital to getting to know more people on the team. I happened to be in a new role, because at [our organization] we change roles every year. But I don't think I would be having any success in this role at all if we hadn't spent time kind of getting to know each other a little less formally with that larger group at the Learning Program."* [ID226]

## Increasing Openness: Navigating the Tension between Vulnerability and Psychological Safety

The VTO activities were also critical in helping participants come to know each other on a deeper level, outside of their work roles, as they were completing an unfamiliar task in a new environment. According to the shared activities principle (Uzzi & Dunlap, 2005), participating in activities that connect one with diverse others is a great way to build stronger, more authentic, and more enduring relationships. Working with others through a shared activity builds trust and helps people see different sides of themselves. The VTO activity was one such shared activity:

*"Being able to volunteer with people was actually an important part of that. So, we were literally digging in the dirt. That just forms a different kind of bond than typing on a keyboard and staring at each other on Zoom. You know, passing each other plants, self-organizing around who's going to plant what and what row and who's going to dig holes and who's moving a tarp. That was just a different kind of organization than we normally do, because no roles were assigned. So that was a great exercise. And I think other people get to see you in that space too. So not only did I make relationships, I now am more*

*connected to those people personally, and have an understanding of their genuine self out in the world. [ID509]*



Image: Homeless Garden Project Could Soon Have a Home of its Own  
<https://www.ediblemontereybay.com/blog/homeless-garden-project-could-soon-have-a-home-of-its-own/>



## Increasing Openness: Navigating the Tension between Vulnerability and Psychological Safety



*Image:* Luis Vega (from left), Marco Antonio Ceja and Juan Cadenas are part of a crew of volunteers at the Second Harvest Food Bank in Watsonville that put together bags of produce and other goods for needy families. —photo by Tarmo Hannula/The Pajaronian  
<https://pajaronian.com/second-harvests-annual-holiday-food-drive-goes-virtual/>

The VTO activity also helped to “level the hierarchy” and take participants out of their formal work roles by promoting a shared, communal experience where they were side-by-side:

*“Normally I’m not going to boss my boss’s boss. But if we’re planting things and we’ve got a rhythm together and then he comes*

*up and starts messing it up, I’m gonna tell him to stop it and leave it on the line and maybe he should start digging over there, because we’ve got other plants down there... Most days, I’m not going to tell him how to do anything. But here it’s a very different set of social permissions.” [ID 880]*

The non-profits we spoke with also valued the openness demonstrated by Learning Program participants through the VTO activity. As one interviewee stated,

*“I just feel like some of these people, they really opened up to us and they really worked hard when they were here and it felt very supportive. And it’s almost like hey, I’d just love to shoot you this thing [video] and say look what we did. It’s really truly not about donations, but about here’s... a snapshot of our season.” [NP006]*

Our interviews with the non-profits also revealed the powerful role of volunteering in helping to elicit deeper levels of sharing and disclosure, break down stigmas around homelessness and disability, and thus further their mission. They highlighted that benefits accrue to both the community and the Study Group volunteers. Mutual learning often occurs, (continued)

## Increasing Openness: Navigating the Tension between Vulnerability and Psychological Safety

including increased openness, understanding, and acceptance of others' life experiences. The volunteer activity created a psychologically safe space where this could happen. As one non-profit interviewee expressed:

*"There's a learning that goes both ways, and that's really valuable to change perceptions of homelessness. There's a lot of stigmas out there. And the volunteering program really works to build those bridges, because once you've met and talked with our trainees and worked in the field, get your hands in the soil together. And then you get to break bread together and you*

*have a meal featuring food that was grown right there. And it's fresh and delicious. And you get to see people as, well, people, and that really matters. Then you create advocates out in the world and folks more likely to treat others with respect. And as a really small organization with a grassroots budget, having volunteers help us get the work done that we need to get done. It's 50 pairs of hands that can get done in an hour what it takes our crew a full day. So, it was really amazing to see the team show up and we have a task set aside and they just mow right through it. Really, it's pretty impressive."* [NP001]

## Recommendations:

1. *Plan for activities away from the office and out in nature in order to remove the familiar and stretch openness to new experience.*
2. *Prepare participants by normalizing potential feelings of vulnerability in new activities and settings, explaining that personal growth occurs during such stretch experiences.*
3. *Recognize that comfort levels surrounding sharing personal lives and desire to do so varies across participants; be sensitive to those that are more reluctant to share.*
4. *Encourage supportive communication which is non-judgmental, respectful, compassionate, and characterized by more listening than speaking in order to build a climate of psychological safety.*
5. *Purposefully include participants at multiple levels working side by side outside of work to foster personal connections with fewer inhibitions imposed by hierarchy.*
6. *Emphasize the shared activities principle: volunteering and working collaboratively to achieve a significant and meaningful piece of work or project which addresses a social cause builds bond and increases social impact.*
7. *Develop community embeddedness by channeling openness to new perspectives, in the form of understanding the lived experience of others who are less fortunate and privileged; the VTO activities are ideal for this.*

## Embracing Uncertainty: Navigating Tension Between Structured and Unstructured

Another key mechanism for The Ranch's success is that it represented a balance between structured and unstructured activity which is key for coping with uncertainty. Unstructured activity helps create 'flow' - an experiential state characterized by attentional immersion, high productivity, and emotional gratification (Csikszentmihalyi, 1990). Achieving a state of flow has been linked with positive individual outcomes of increased happiness and well-being (Kawalya et al., 2019), and it also helps to improve team cohesion, trust, and performance. One way in which a state of flow can be created is through unstructured playfulness and discovery, yet participants also appreciated that the sessions provided some 'guardrails' which enabled them to grapple with uncertainties at work while embracing the unknown with a greater sense of confidence and adventure.

The Learning Group participants valued the way in which the program, setting, and activities were conducive to a combination of structured and unstructured. In the survey, a text comment suggested:

*"So, there was real work. There was playfulness. It was a good blend."*

*"The balance of structured time vs. unstructured time was perfection. The goal was connections and the agenda facilitated connections beautifully."*

Another interviewee explained the way the flow of activities at the Learning Program facilitated the organic moving back and forth between work and non-work, indoor and outdoor space, structured work sessions and unstructured play. When asked whether the aim of the Learning Program was to conduct work or get away from work, an interviewee responded:

*"I think it's a delicate balance of both and I think they did it in a nice way that had us able to spend time together not working so that we could come together and more naturally flow into work and then flow into something else. We didn't have hard, crisp moments between work and then well-being because that's not real life. I appreciated this lack of hard breaks. It wasn't like, 'Oh ok, we're done with the meeting now and you're gonna get on the*



## Embracing Uncertainty: Navigating Tension Between Structured and Unstructured

*bus and you're gonna go plant things in the earth.' We didn't shut down and then come back to that – people were ebbing and flowing and milling, you know, the whole time and so it felt a little more organic.” [ID012]*

Another interviewee from a Team Connections retreat explained how the combination of structured work and unstructured play made the experience unique and impactful. This employee enjoyed the contrast between the work-related sessions in the meeting room and the wellness activities: taking a nature walk, having a glass of wine around the campfire, and participating in a communal drumming session. While the participant considered some structured work to be beneficial, the wellness activities and relaxed campfire interaction provided additional sources of unstructured play that helped to enhance team connection as well as individual well-being.

*“I loved being able to sit around, both in a meeting room where we're working and white-boarding and brainstorming, but also around the campfire having a glass of wine. I'm a very active person, so being able to do the nature walk was great. I'm*

*kind of a wannabe aboriculturalist, which is a tree expert, so to be able to go out there and actually touch a major Sequoia, a redwood tree. Yeah, it's wow, very, very, very special. To be able to experience that. Doing the drum session as a team and seeing people, oh, look how that person is responding to the music. They're really just letting go and letting that rhythm take over them.” [ID019]*

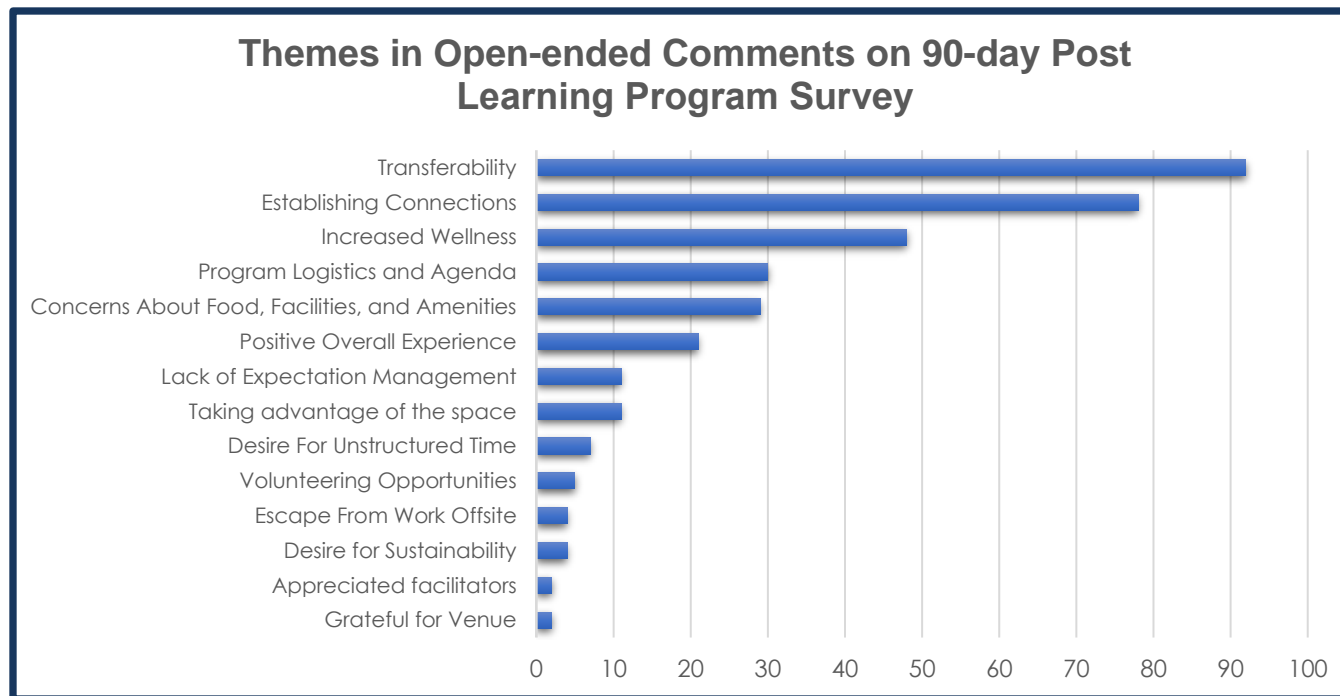


*Image: Courtesy of 1440 Multiversity*  
<https://www.facebook.com/1440multiversity/photos>

**Embracing Uncertainty:** Navigating Tension Between Structured and Unstructured

The balance between structured and unstructured activities also appears to be key for transferability of the experience into life after the Learning Program. This was expressed in 27% (92/344) of comments in response to the open-ended questions on the 90-Day Post Learning Program Survey). But there were many challenges expressed. One participant said,

*"The Learning Program taught me to connect with nature and myself a bit more. Which I am doing. But my experience at the Learning Program was mixed. I think if I had been with a team that I am working with and the sessions were more around working with people I work with regularly, or project based, it would have been more rewarding. My experience felt a little purposeless and I felt exhausted with all the small talk."* [ID330]



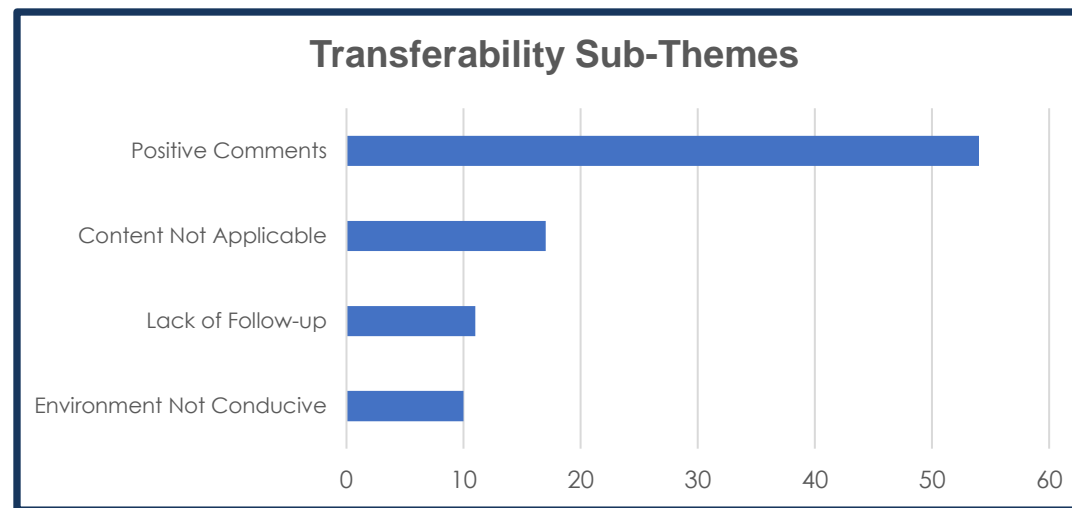
## Embracing Uncertainty: Navigating Tension Between Structured and Unstructured

We examined in greater detail the comments pertaining to transfer of the experience in the 90-Post Learning Program Survey, and found that although many were positive, three re-occurring themes suggest areas for improvement: adjusting content so that transferability is clear, ensuring the work environment is conducive to transfer, and reinforcing the learnings. For example, participants commented (see Appendix B for additional examples):

*"It was a wonderful time to reconnect with colleagues, eat delicious food, and incorporate some wellness into my day, but I can't say that there were "lessons" per se that I took back with me."* [ID91]

*"Although my intentions are to incorporate my learnings from the Learning Program in my life going forward, it is hard / impractical to put away the devices, set aside time for my personal wellness, and work on person-to-person connections in my every day life."* [ID119]

*"Day to Day or weekly fire-drills in the org are so bad that it's difficult to find time to internalize and implement all of the learnings plus there is lack of support from LT and ELT to much of this in practice."* [ID175]



## Embracing Uncertainty: Navigating Tension Between Structured and Unstructured

Interviews with the non-profit partners revealed opportunities for improvement in the VTO component of the Learning Program. As one non-profit interviewee stated:

*"The volunteers from the Study Group would really start getting into that rhythm and like okay, now I know exactly what this is. This is a weed. This is a strawberry. And they get into it. And then you know [there would be] 15 minutes or less left, or just 10 minutes, then they would say, 'Shoot, we just got into the rhythm of it.' And that is something. They really got into the groove of it and wished they could stay longer." [NP002]*

Just as participants would get into a state of flow, their volunteering time would be over. Devoting more time to the VTO activity would help to maximize the benefits from flow, while also enhancing the social impact of the volunteering for the non-profit. In some instances, it wasn't the amount of time, but when the volunteers worked. One partner mentioned that Study Group volunteers often worked in the afternoons, while their trainees worked in the morning, such that there was no overlap. Adjusting the VTO activity to be an hour or

two earlier would be a simple way to ensure that there is more interaction between these two groups.

Another benefit of extending the amount of time or changing the scheduling of it, is to allow for unstructured and informal opportunities for participants to interact or share a meal together with the trainees. One interviewee elaborated on the benefits of breaking bread together in building trust and allowing for a deeper level of sharing that can help to further the mission of changing perceptions of homelessness:

*"And I'll share what we find with our volunteer groups when we can share a meal together. It really is that eating lunch together where a lot of those stigmas around homelessness would start to break down. If you work in the field, you're just kind of talking about what's happening that day or the task at hand. And then you find the more time you have, the more you can get to build that trust and then talk and so then the trainee might share that they are a trainee in the program. You know, we don't often say here's person A and they're a trainee in the program. They're experiencing homelessness. We don't do*



## Embracing Uncertainty: Navigating Tension Between Structured and Unstructured



*Image:* Courtesy of 52 and Change  
<https://52andchange.org/housing-matters>

*that. But it comes out more organically in the conversations. And it is lunch together where we find that connections really happen.” [NP001]*

Without just informal interaction, corporate volunteers may never know that they are interacting with trainees who are experiencing homelessness or disabilities, and may fail to confront their own perceptions about these experiences. Our interviews with Study Group participants indicated that they had little awareness or interaction with the populations served by the non-profits, and were unfamiliar with the mission of the organizations.

## Recommendations:

1. *Facilitate the ability to maximize innovative thinking by reducing (or eliminating) routine work responsibilities during the retreat, and replacing that with more time for discovery and experimentation.*
2. *Maintain a balance between structured and unstructured activities that allows for a state of flow, in order to ensure that participants are fully present, focused, and sharing; getting out of the office helps to ensure that there are less day-to-day work distractions.*
3. *Guide employees through the process of applying their learnings during the retreat to their daily lives and work, such as approaching the unstructured with a playful mindset, in order to better cope with uncertainty and unknowns.*
4. *Identify the transferable components of the experience before participants depart and establish mechanisms for reminding them of these, and checking-in on progress toward transfer (e.g., Slack reminders).*
5. *Engage in strategic planning for VTO partnerships and activities (See guidelines below).*
6. *Ensure understanding of the mission and aim of the non-profit organizations, as well as the particular objectives they hope to accomplish through the partnership, which may include shifting perceptions and learning about societal challenges.*
7. *Devote more time to the VTO activity and schedule the activities so as to promote interactions and relationship development with the community.*

## Conclusion

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In conclusion, our analysis revealed that through the unique venue and content of sessions, as well as the substantive volunteering opportunity embedded in the local community, the Learning Program experience helped to establish connections by balancing belonging and uniqueness, enhance thriving by balancing cognitive growth with physical vitality, increase openness by balancing vulnerability with

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psychological safety, and embrace uncertainty by balancing the structured with the unstructured. We have provided action recommendations for companies and non-profits to maximize this experience. In the tables below, we apply these learnings to offer guidelines for corporate-community partnerships that will amplify the social impact achieved.

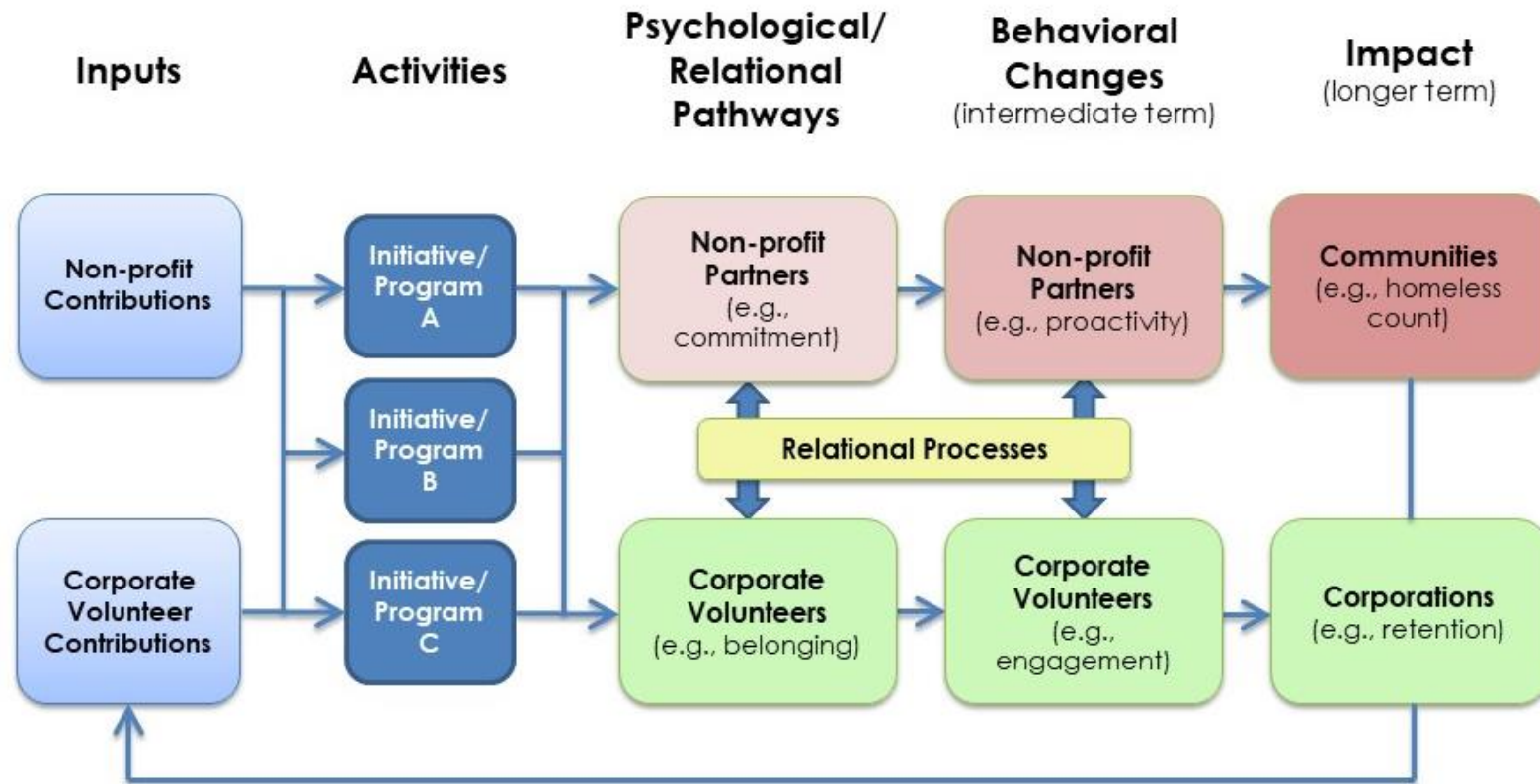
# Guide to Corporate-Community Co-Development

## Pre-Volunteering

Time Horizon	Corporate [Study Group]	Non-profit Community Partner
3-6 months prior to commencing partnership	<ul style="list-style-type: none"> <li>Secure strategic involvement of Corporate Social Responsibility/Citizen Philanthropy/Sustainability officers in design and selection of volunteer initiatives in order to align volunteering with overall firm strategy for social impact</li> <li>Develop partnerships and initiatives that target a specific subset of relevant social problems</li> <li>Consider identifying 2-3 'pillars' of activity organized by social causes that map onto the United Nations Sustainable Develop Goals</li> <li>Identify non-profits that address the targeted problems and goals</li> <li>Contact these potential partners to understand their mission, needs, priorities and possible activities volunteers could undertake</li> <li>Select partnerships and activities that have the highest potential for employee engagement, meaningfulness, capacity building and social impact on the community</li> <li>Utilize unique employee skills and organizational assets; identify volunteer duration needed to do so</li> <li>Consider how you will know if the partnership is a success and identify indicators you can assess</li> <li>Begin collecting these indicators to establish a current (pre-partnership) baseline for both participants in volunteering and non-participants</li> <li>Collaborate with the selected non-profits on a 2-3 page brief about each partnership that you will distribute to employees</li> </ul>	<ul style="list-style-type: none"> <li>Develop a clear and concise mission statement that communicates primary social problems addressed and key constituents served</li> <li>Consider articulating how your particular purpose maps onto the United Nations Sustainable Develop Goals in order to locate your focus in a broader social change agenda</li> <li>Delineate a framework or theory of change (see next page) which outlines the contributions you seek from corporate partners and what you are able to contribute; the programs, initiatives or activities that (when accumulated) address the problems you want to solve; intermediate outcomes; and longer term social impact</li> <li>Arrive at specific initiatives and activities (e.g., develop a new service, expand transitional housing, develop training, outreach materials)</li> <li>Define ideal duration of partnership and for each volunteering session</li> <li>Identify indicators of success for the processes, intermediate outcomes, and longer term social impact</li> <li>Begin collecting information about these indicators to establish a current (pre-partnership) baseline; consider including both recipients of volunteer contributions and non-recipients for comparison</li> <li>Explore potential corporate partners by communicating the above and enlisting their support</li> </ul>



# Guide to Corporate-Community Co-Development



Sample Framework for Change

# Guide to Corporate-Community Co-Development

## Pre-Partnership

Time Horizon	Corporate [Study Group]	Non-profit Community Partner
2 weeks prior to volunteering	<ul style="list-style-type: none"> <li>Provide the brief to all participants (coordinators, volunteers, facilitators)</li> <li>Communicate the non-profit's mission and how it enacts it (could be in the form of an infographic or video customized for your corporation)</li> <li>Explain the activity or initiative and how it contributes to the non-profit's mission</li> <li>Emphasize importance of participation and how it fits with company culture and values, as well as a broader social change agenda</li> <li>Collaborate with non-profit to schedule volunteering so as to maximize contributions and meaningfulness (e.g., if non-profit trainees work mornings, arrange morning sessions to ensure interaction)</li> <li>Finalize logistics (e.g., transportation, meals, hydration)</li> </ul>	<ul style="list-style-type: none"> <li>Develop an introductory briefing to be used in greeting the volunteers as they arrive</li> <li>Include the information identified above on mission, purpose, and framework for change</li> <li>Be prepared to explain the specific initiative or activity and how it contributes to the overall mission</li> <li>Consider involving multiple staff and constituents in the introductory session; encourage them to prepare ahead of time and to tell the story of their involvement</li> <li>Collaborate with the company to schedule the volunteering so as to best accomplish the intermediate outcomes and maximize social impact</li> <li>Finalize logistics with staff to make preparations for arrival, supplies and activities</li> </ul>

## During Volunteering

Time Horizon	Corporate [Study Group]	Non-profit Community Partner
Arrival	<ul style="list-style-type: none"> <li>Ensure company representatives meet and greet non-profit staff and at least one remains onsite</li> <li>Encourage personalized interaction with the non-profit staff and constituents</li> <li>Emphasize full engagement in the activity and review schedule for session (duration, departure time/place)</li> </ul>	<ul style="list-style-type: none"> <li>Ensure staff meet and greet company representatives and introduce themselves to the volunteers</li> <li>Provide introductory briefing prepared as per above</li> <li>Encourage interaction among company, non-profit staff and constituents (where feasible)</li> <li>Consider providing a 'tour' of the facilities</li> </ul>

# Guide to Corporate-Community Co-Development

## During Volunteering (cont.)

Time Horizon	Corporate [Study Group]	Non-profit Community Partner
Organizing activity	<ul style="list-style-type: none"> <li>Check-in on activity progress and ensure everyone remains engaged</li> <li>Consider helping non-profit to organize informal 'competitions' among subsets of the group (e.g., which team can complete the most hygiene kits?)</li> <li>Encourage openness to new experience, discovery mindset, adventure, and playfulness</li> <li>Point to learnings and new perspectives being gained</li> </ul>	<ul style="list-style-type: none"> <li>Check in on activity progress and ensure everyone remains engaged</li> <li>Be prepared to re-assign tasks as necessary to accommodate special needs (e.g., allergy, limited mobility)</li> <li>Consider informal 'competitions' among subsets of the group (e.g., which team can complete the most hygiene kits?)</li> </ul>
Closing	<ul style="list-style-type: none"> <li>Collaborate on a closing that reiterates the alignment between the non-profit mission and the company values</li> <li>Reinforce accomplishments and impact</li> <li>Ask a volunteer from the group to express gratitude for the opportunity to volunteer</li> </ul>	<ul style="list-style-type: none"> <li>Collaborate with company on a closing which summarizes what was accomplished, how that contributes to the mission of the organization and the larger social change agenda</li> <li>Provides means for follow-up, including additional volunteer opportunities, donations, or other support</li> </ul>

## Post Volunteering

Time Horizon	Corporate [Study Group]	Non-profit Community Partner
Sustaining benefit	<ul style="list-style-type: none"> <li>Share photos and videos from the volunteering on social media (e.g., Slack channel) to remind about the shared experience</li> <li>Exchange these posts with the non-profit</li> </ul>	<ul style="list-style-type: none"> <li>Share photos and videos from the volunteering on your website and in your brochures (or other social media) to reinforce the shared experience</li> <li>Exchange these with the company</li> </ul>

# Guide to Corporate-Community Co-Development

## Post Volunteering (cont.)

Time Horizon	Corporate [Study Group]	Non-profit Community Partner
Maintaining relationships	<ul style="list-style-type: none"> <li>Ask a member of the group to informally communicate with the non-profit staff to solicit feedback on how the experience helped to further their mission and any direct impacts it had and report this to everyone who participated in the activity</li> </ul>	<ul style="list-style-type: none"> <li>Ask a member of the staff to informally communicate with the company how the experience helped to further your mission and any direct impacts it had and report this feedback to everyone who participated in the activity</li> </ul>
Program assessment and learning	<ul style="list-style-type: none"> <li>Implement post-partnership assessments, collecting information on impact on employees</li> <li>Compare indicators pre-partnership and post partnership (and participants to non-participants) to assess impact</li> <li>Communicate progress on indicators of success with the non-profit, policy makers, and the rest of the company</li> <li>Encourage reflection among those that participated; ask them to share their experiences broadly, including and how it reflects company culture and values</li> <li>Discuss functionality of the initiatives and partnership to determine potential adjustments</li> </ul>	<ul style="list-style-type: none"> <li>Implement post-partnership assessments, collecting information on the indicators of impact, including impact on constituents</li> <li>Compare indicators pre-partnership and post partnership (and participants to non-participants) to assess impact</li> <li>Communicate progress on indicators of success with funding agencies, policy makers, and the company</li> <li>Discuss functionality of the initiatives and partnership amongst your staff to determine potential adjustments</li> <li>Collaborate to make any changes necessary to improve impact</li> </ul>





*Image: Courtesy of 1440 Multiversity  
<https://www.facebook.com/1440multiversity/photos>*

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## Appendix A. Sample Quotes Illustrating Major Themes

Theme	Definition and description	Examples
Establishing Connections	Describes instances in which conversations and interactions occurred, in which individuals were able to be authentic and share their unique voice, often resulting in the development or solidification of deeper relationships.	<p>"That was such a wonderful experience. Absolutely everything was above and beyond fantastic. It was exactly what I needed to get to know my colleagues in this post-covid world. Happy hours are wonderful and definitely necessary, but staying on a campus where we eat, learn, and play together absolutely fast-tracks bonding in a way we really needed. This was perfection."</p> <p>"Loved going into a big program (140 ppl) where no one knew each other. It was intimidating at first but I truly believe that allowed the group to be vulnerable with each other. Not having any preconceived notions about each other made it easier to connect. For example, I met a man in a wellness activity and then we ended up at the same session table the next day. We chatted quite a bit and we had a great time! He even offered to help me navigate his org. We connected on LinkedIn after the trip and it was only then that I learned he is a VP, while I'm a manager. Never would I have had such a candid conversation with someone like him if I knew his title. I would have been too intimidated! So powerful, in my opinion."</p> <p>"Amazing experience overall, really appreciated the smaller size of our Connections group which helped foster transparent conversation and deeper connections."</p>



## Appendix A. Sample Quotes Illustrating Major Themes

Theme	Definition and description	Examples
Wellness	Describes instances in which respondents felt an increase in physical or psychological well-being.	<p>"This was the first time I have participated in a program that focused on a combination of wellness, nature and learning. I am blown away by the relaxed atmosphere, but how impactful our sessions were. Holding sessions for 1.5 hours, followed by a break or activity provided time to be more insightful, focused and refreshed. I felt I got more out of these shorter leadership sessions than combining all my leadership sessions over the past 6 years. I LOVE what the team has created and hope to be part of it again soon."</p> <p>"I love how the entire site is integrated with nature and beautifully landscaped, enabling easy flow between the various indoor and outdoor spaces. The redwoods "theme" of connection and helping others grow is also very apt. Being in nature and among trees is very helpful to mental wellbeing and helps to enable disconnection from work. I also loved the outdoor amphitheater right outside the main conference hall area. It was great to have this space available to gather as a large group or for smaller breakout groups. Additionally, the amount of shaded areas was helpful given the warmer summer climate in the bay area."</p> <p>"The connection to the outdoors is absolutely essential - and multiple areas for quiet contemplation are also needed. The food also should continue to be top notch... all natural and nourishing."</p>

## Appendix A. Sample Quotes Illustrating Major Themes

Theme	Definition and description	Examples
Grateful for Venue	Describes instances where respondents noted specific features of the 1440 venue that contributed to their experience.	<p>"The food, the stretching/Qi Gong sessions, the walk in the woods, the firepits with full service from Common Grounds...it was all almost too much to believe. It made for a transformative experience for me."</p> <p>"I think the location and design are perfect and I wouldn't change a thing. If I sat down to design the perfect Learning Program from scratch this is what I would design. I think the size of the venue was ideal for small, focused intimate gatherings of teams. Any larger and it would be difficult to find your way around and harder to build those connections."</p> <p>"The immersion in nature with all the trees, trails and natural elements. Nice accommodations and access to good food. A lot of places to be able to have quiet time to reflect or connect with others like the fire pits."</p> <p>"Get to know new people and learning in a beautiful place where everything is taken care for you and so well and you don't have to think of anything except enjoying people, nature, food, music. Everything was close by; you could walk 5 minutes everywhere."</p>

## Appendix A. Sample Quotes Illustrating Major Themes

Theme	Definition and description	Examples
Escape From Work	Describes ways in which the Learning Program enabled a break from work.	<p>"Perhaps remove anything that is extremely work intensive; it'd be nice to save the Learning Program for experiences that allow space/ down time."</p> <p>"Celebrations and events that feel like they are exclusively or only for executives would detract from the value of the Learning Program and its accessibility and power to create impact for a diversity of individuals. I also don't feel like "traditional work" meetings belong at the Learning Program. I would hate to see [it] turned into a work planning offsite location (and it would be a wasted use of the unique place since work planning can happen anywhere)."</p> <p>"I feel the team off-sites are a much better idea to start with in this remote work environment."</p>
Appreciated Culinary Experience	Describes the positive experiences with the food and dining.	<p>"The food, not only the quality and taste, but the thoughtfulness with which is presented and shared with attendees. Natural beauty, not too much corporate branding"</p> <p>"The forest and natural beauty are major strengths. As well as the abundance of local yummy foods. I also appreciate how close it is to HQ."</p> <p>"The food was PHENOMENAL. I literally have not had that level of quality in meals so consistently anywhere else."</p>

## Appendix A. Sample Quotes Illustrating Major Themes

Theme	Definition and description	Examples
Concerns About Food, Facilities, and Amenities	Describes concerns about accessibility, availability and variety of dietary options, and comfort.	<p>"While I do not require a wheelchair, I noticed that many of our activities were in areas that are not wheelchair accessible i.e., first session was at the Cathedral in the woods, nature walks, etc."</p> <p>"I don't think the experience is fully accessible for differently-abled individuals. If you are not able-bodied then I think this would be a tough experience."</p> <p>"When I arrived, I inquired about the wifi and Learning Program employee I asked had no information and seemed confused."</p> <p>"I did notice some folks had to request for alternative vegetarian options as opposed to them being ready, but when they were provided to them, they were delicious."</p> <p>"There is not enough 'plain' food for those who do not like multiple sauces, food with ingredients you can't remove. A simple salad bar as an alternative to the meal of the day would make a difference. I also feel that the time it takes to get your meal is too long."</p>
Desire For Sustainability	Describes suggestions for increasing environmentally-friendly practices during the Learning Program experience.	<p>(in regards to improvements to the Learning Program): "More digital less print (printouts, plastic cups, more affordable options in the lodge gift shops)."</p> <p>"What an incredible experience, thank you. My only feedback would be for the campus! They compost behind the scenes, but there was nowhere for me to drop my compostable to-go cups, banana peels, etc. so they ended up in the trash."</p> <p>"I'm nitpicking here because I can't really think of much except that it could be more eco-friendly (e.g. fewer outdoor lights, more solar panels, not have electricity consuming features like the waterfall)."</p>

## Appendix A. Sample Quotes Illustrating Major Themes

Theme	Definition and description	Examples
Desire For Unstructured Time	Describes the need for informal interactions, flexibility in the scheduling and allowing unstructured activities.	<p>"More 'recharge' time in offsites. LEAP is a very packed, long week - more breaks to enjoy the facility would have been nice."</p> <p>"I enjoyed it so much -- if I could be a little greedy, I'd say maybe extending the trip a 0.5 day would make a huge impact. We did SO much in our 48 hours that there was not much downtime! A few extra hour-long breaks could have gone a long way for resetting between activities. That said, I wouldn't have removed a single activity!"</p> <p>"With all the nature around, it might be useful if the attendees get a little more time to explore the facility on their own. The optional wellness programs are all good but it might be helpful if there's a little bit of buffer time between them."</p>
Program Logistics and Agenda	Describes the sense of balance in the program and activities offered.	<p>"I appreciated that the schedule was varied and that we were encouraged to participate in a variety of programming. It made it feel distinct from other Study Group experiences."</p> <p>"I think two nights is good: it really took us until night #2 to feel very relaxed and comfortable with each other. But by day #3, we were all really tired and struggling a bit to engage with the learning activities. I think keeping the last day more light and short (breakfast, gratitude/wrap-up) vs. squeezing in one more session is optimal."</p> <p>"I was so impressed by both the 1440 staff and the Study Group Staff to facilitate and guide us through a very impactful and meaningful program in such a short amount of time. It was truly an unforgettable experience."</p>



## Appendix A. Sample Quotes Illustrating Major Themes

Theme	Definition and description	Examples
Lack of Expectation Management	Describes concerns about how the experience is framed, instructions and guidance about logistics and protocols.	<p>"This was more program-specific, but there were some inconsistent communications in the lead up to the Learning Program that caused some confusion i(e.g. in the kickoff call we were told there would be a shuttle going from San Francisco but then we later learned there wasn't a shuttle, and one of the key Slack posts about logistics for the event was deleted the weekend right before when I was hoping to use the information to pack)"</p> <p>"Better expectations around the agenda would have helped. We didn't know much about what we'd be doing so didn't really know what to plan for. On a similar note, I think better guidance on what to wear would be helpful. We were told to dress as we would for work but then spent a lot of time hiking, being outside in the heat, doing active VTO, etc. I would stress a more casual environment."</p> <p>"I found myself wishing I had better-set expectations to fully disconnect. The agenda, going in, was a little vague, so I didn't know what we'd be doing or how intense things would be. So, I think emphasizing that the best experience is fully disconnecting (and giving folks notice to be able to do so) would help. And maybe a bit more emphasis on this to our managers (although the email was great).</p> <p>"I was trying to somewhat keep up with work, while fully participating at the Learning Program, and I left feeling really tired vs. energized. I still LOVED the program. I just wish I had planned better to get the most out of it."</p>

## Appendix A. Sample Quotes Illustrating Major Themes

Theme	Definition and description	Examples
Taking Advantage of The Space	Describes the desire to experience all that the venue has to offer.	<p>"The current program is the right mix of indoor and outdoor activities. The woods are great for connecting with nature and have a less tech driven day and event. Less tech also meant less distractions and truly stay here and now and enjoy the moments and the place."</p> <p>"Some things were too close to one another (live music and sound bath wellness activity specifically), it felt like there was a lot of unused space (but I realize those spaces may have been used by other groups)"</p> <p>"The Learning Program is the perfect venue to build trust with colleagues, especially these days when most people work on virtual teams and don't necessarily know each other. It would be ideal to have in-person time with each other, at such a beautiful location, for fearless teaming exercises and really getting to know each other."</p>
Challenges with Transferability	Describes difficulties in deriving learnings about Study Group culture and values and applying those learnings to work roles.	<p>"Programs should be more focused for departments specifically. More tangible learning would be helpful with leaders within our own departments."</p> <p>"When I was invited to the Learning Program, I thought it would be more ["Study Group"] and less corp. retreat. It was a great experience, and I would be first in line to do it again, but I think there could have been more ["Study Group"] in there."</p>

## Appendix A. Sample Quotes Illustrating Major Themes

Theme	Definition and description	Examples
Volunteering	Describes the experience of volunteering.	<p>"I felt empowered to do my best work after the initial sessions on Day 1 i.e. an introspective journey to help build resiliency + volunteering. I left the Learning Program feeling the buzz I had from bootcamp 7+ years ago!"</p> <p>"The VTO activities seemed like a place for minor improvements. I did the Housing Matters VTO which could have happened entirely at the Learning Program. We didn't get a chance to completely finish the activity and the travel time ate into the time available to wrap up. Maybe in the future this come be done onsite and the transportation could be used to move the supplies and staff from Housing Matters to the Learning Program so we can still meet them but have longer to work on the bags."</p> <p>"Amazing experience from start to finish...the only feedback I have is around the VTO, with the amount of people in our group, it would have been great to do a 3rd session so more people could get involved?"</p>
Responsive Service	Describes instances in which 1440 staff welcomed participants and enabled a comfortable stay, which often eased anxieties and contributed to wellness.	<p>"Luigi was an outstanding leader and delivered exceptional customer service. I had some dietary restrictions and he and the dining team went above and beyond to ensure that I was accommodated. Katie, Emily (gift shop) Debbie, Mauricio (dining) were all fantastic as well."</p> <p>"Really enjoyed the engagement of the staff at the Learning Program, everyone was friendly, inviting, and welcoming. I was walking around exploring and someone asked if I needed help to find anything. Also, all the food service folks were so congenial and thoughtful about the plating."</p> <p>"Appreciate the swift check-in and personalized service throughout the program"</p>

## Appendix A. Sample Quotes Illustrating Major Themes

Theme	Definition and description	Examples
Appreciated Facilitators	Describes appreciation for the expert skills of facilitators, in particular in helping participants feel comfortable with vulnerability, resulting in a more meaningful experience.	<p>"[Internal Study Group session] was amazing. I feel lucky that I was able to participate in it. Fantastic Facilitator Coaches. I will apply what I learned to all aspects of my job. I feel like I got to know my fellow [Study Group colleagues] better in 2.5 days than others who I have worked with for years. The Learning Program inspires vulnerability, openness, and connection. I'm excited for others to experience it."</p> <p>"An amazing experience through and through! From the staff to the incredible food to the Study Group team members in attendance. The only thing I would recommend changing is rewatching the [organization] presentations since most team members had already seen the presentations at least once. It was a bit repetitive for many and kind of took away from the experience. Perhaps polling the attendees and allowing those who have not seen it or wish to rewatch the opportunity while allowing others to take a break and reconvene after. Just a thought. I loved the energy and input from everyone during the sessions. The moderators did a fantastic job!!"</p> <p>"I am grateful for the wonderful Learning Program experience! It was wonderful to disconnect from devices for a few days and connect with new colleagues! The facilitators were excellent and the staff was super friendly/accommodating. The well-being options were also amazing from yoga, sound bath, meditation to the nature hikes. I am so thankful for having the opportunity to attend!"</p> <p>"Nothing - keep it up! This is a comfortable place to leave our comfort zones to fully learn and be open to new ideas and perspectives."</p>
Positive Overall Experience	Describes generally positive sentiments expressed in non-specific comments.	"I honestly cannot think of anything to improve! The setting was perfect and our program was exactly what we needed"

## Appendix B. Sample Quotes for Transferability Sub-Themes

Theme	Definition and description	Examples
Positive comments	Describes ways in which the Learning Program had a positive lasting impact.	<p>"Being at the Learning Program truly helped me to feel and experience Study Group culture and values in action. It was powerful and inspiring and helped me be a better leader."</p> <p>"The visit to the Learning Program made me feel overall more connected to [the organization] motivated me to want to work harder for the company. This ultimately impacted my sales results."</p> <p>"The experience felt like I renewed my vows with [Study Group]. I highly recommend this experience for all employees."</p> <p>"After the pandemic, and the time in global lockdowns, it was hard to reconnect with others and our culture. This was the first time in 2 years I had been with a large group of people. Creating that covid-free bubble was such a breath of fresh air. This experience energized me, and made me fall in love with our amazing company culture again."</p>
Lack of follow-up	Describes challenges due to lack of reinforcement of learnings.	<p>"I think it would be great to have a more concrete takeaway, like a resource to go back and reference to remind an attendee what to remember from the Learning Program."</p> <p>"I know I learned so much at the Learning Program, but I feel like I've forgotten a decent amount of it already."</p> <p>"It would be great to have follow-up sessions once back at our different day jobs."</p> <p>"We are overloading with training and learning. It would be nice to see refresher content to remind what we learnt."</p>



## Appendix B. Sample Quotes for Transferability Sub-Themes

Theme	Definition and description	Examples
Content not applicable	Describes challenges in integrating experience due to the nature of information and activities.	<p>"Still unsure of how to utilize the Learning Program for my team"</p> <p>"The experience was interesting and I appreciated the surroundings and amenities, but the presentations and content were neither new to me, nor particularly impactful. In order to be worth the trip and time I would need to know in advance that the content would be more inspiring."</p> <p>"I didn't really learn any lessons. All we did was watch recordings of [Study Group] keynotes."</p> <p>"The cultural, wellness and connectivity programs experience at the Learning Program does not translate to my day-to-day priorities and the current business climate and pressures of the organization."</p>
Environment at Work Not Conducive	Describes challenges in integrating experience due to work and life demands.	<p>"Loved the experience but most of the practices have not become part of our daily routine"</p> <p>"The biggest challenge was returning back to work and feeling like management didn't care about what I had learned. I was never asked about the experience and when I brought it up, the subject was changed quickly. Managers of attendees need guidance/tools for how to leverage the experience of people who go to the Learning Program. I returned on a high and excited to be working for [the Study Group], but that quickly disappeared."</p> <p>"It was good to feel involved with the greater [Study Group] mission, but it's been hard to translate to everyday life."</p> <p>"I learned so many amazing things at the Learning Program, but when I returned to my team I didn't feel supported by management to try to implement or focus on change. I felt pushed back to business as usual."</p>