1995

Experience-Based Training and Development : a handbook

Elizabeth Vitanza
San Jose State University

Follow this and additional works at: https://scholarworks.sjsu.edu/etd_theses

INFORMATION TO USERS

This manuscript has been reproduced from the microfilm master. UMI films the text directly from the original or copy submitted. Thus, some thesis and dissertation copies are in typewriter face, while others may be from any type of computer printer.

The quality of this reproduction is dependent upon the quality of the copy submitted. Broken or indistinct print, colored or poor quality illustrations and photographs, print bleedthrough, substandard margins, and improper alignment can adversely affect reproduction.

In the unlikely event that the author did not send UMI a complete manuscript and there are missing pages, these will be noted. Also, if unauthorized copyright material had to be removed, a note will indicate the deletion.

Oversize materials (e.g., maps, drawings, charts) are reproduced by sectioning the original, beginning at the upper left-hand corner and continuing from left to right in equal sections with small overlaps. Each original is also photographed in one exposure and is included in reduced form at the back of the book.

Photographs included in the original manuscript have been reproduced xerographically in this copy. Higher quality 6" x 9" black and white photographic prints are available for any photographs or illustrations appearing in this copy for an additional charge. Contact UMI directly to order.

UMI

EXPERIENCE-BASED TRAINING

AND DEVELOPMENT:

A HANDBOOK

A Thesis

Presented to

The Faculty of the Department of

Human Performance

San Jose State University

In Partial Fulfillment

of the Requirements for the Degree

Master of Arts

by

Elizabeth Vitanza

May, 1995

UMI Number: 1374628

UMI
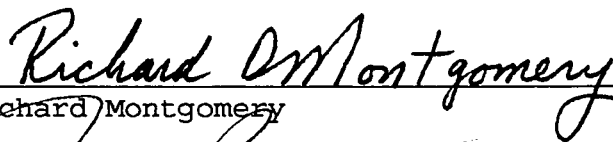
300 North Zeeb Road
Ann Arbor, MI 48103
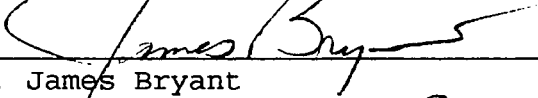
APPROVED FOR THE DEPARTMENT OF HUMAN PERFORMANCE

_____

Dr. Richard Montgomery

_____

Dr. James Bryant

_____

Dr. Barbara Conry

APPROVED FOR THE UNIVERSITY

_____

ABSTRACT

EXPERIENCE-BASED TRAINING
AND DEVELOPMENT: A HANDBOOK

by Elizabeth Vitanza

The historical foundations, theory and components, context within the workplace, and the reasons for the interest in Experience-Based Training and Development (EBTD) programs were investigated. Four models upon which EBTD programs are based were presented. The similar characteristics of EBTD programs as well as the current trends were investigated. A sample program was examined. The proposed methodology concerning the handbook creation and validation of the effectiveness of it as a management training tool was discussed. A pilot handbook was developed based on these findings. The pilot handbook was reviewed by a panel of experts and a final handbook was developed based on the experts' suggestions.

ACKNOWLEDGMENTS

TABLE OF CONTENTS

CHAPTER 1

Introduction

Experience-based training and development programs (EBTD) have become increasingly popular within the past 10 years. In general, EBTD is a type of educational and/or therapeutic program in which adventure pursuits that are physically and psychologically demanding are used within a framework of safety and skills development to promote interpersonal and intrapersonal growth (Bagby & Chavarria, 1980). EBTD consists of a series of structured exercises, or "initiatives," which are undertaken, usually outdoors, by groups of participants. By their design, these initiatives require risk-taking, problem solving, and teamwork for successful completion (McEvoy & Buller, 1991).

Since the late 1970s EBTD programs have been used within corporate, recreational, and therapeutic settings because of their value as a tool to help build teams and develop leaders and champions. Chief executive officers, recreation leaders, and counselors are seeking innovative leadership programs that go beyond the traditional classroom training. In addition, as American business heads into both a global economy and an overall down-sizing of corporate structure, inventive managers and decision makers will be needed to deal with the corporate jungles (Dingle, 1989).

The evidence suggests that today's corporation is quickly changing its structure to prepare for the monumental business challenges of the 1990s and beyond. For some, global competition will be a major challenge. Others are looking at restructuring their manufacturing operations with an emphasis on speed. Still others are looking to reduce internal strife as they commit to a truly diverse, multi-cultural workplace (Dingle, 1989).

To meet these needs and demands, there are currently at least 100 training organizations that offer EBTD programs (Wagner, Baldwin, & Roland, 1991). Participants include a wide variety of groups and companies, including (a) Fortune 100 executives, (b) nurses, (c) civic group volunteers, and (d) lawyers. Some companies, such as the Norton Company and the Naval Weapons Support Center, have developed their own outdoor training programs. Indiana and Xavier Universities, Levi Strauss, Apple Computer, Hewlett-Packard, and General Electric, among others, are sending people into "the woods" as part of their traditional executive education programs (Wagner, et al., 1991).

There is currently a wealth of literature and research that documents the positive effect of using EBTD as a training and development tool with many diverse age groups and populations (Wagner, et al., 1991). The data that have been reported are primarily qualitative and anecdotal.

While the author acknowledges the need for more empirical research, the scope of this project is to develop a handbook of EBTD initiatives to be used as a training tool and resource guide within any type of group setting.

<div align="center">Need</div>

A handbook is needed for several reasons. First, there are at least 100 private, individual EBTD organizations throughout the country. They each have their own teams of instructors (known as facilitators) with various backgrounds, who facilitate programs based on what they have learned through trial and error. Each EBTD organization develops its program based on the collective knowledge of its facilitators. The programs are generally developed and presented from subjective experience and not from the consultation of any specific manual. Many proponents and practitioners of EBTD claim that the uniqueness of EBTD is due to just this very approach. There are no dogmatic sets of rules, no rigid guidelines to follow. Each program is developed based on the specific needs of each individual group; however, the basic tools or initiatives are very similar. Therefore, it would be beneficial and logical to have a compilation of new initiatives as a resource.

Second, EBTD is practiced and facilitated by many persons who are not trained or who have very little experience with EBTD initiatives. They experiment with EBTD

as a method of achieving certain goals. This may be dangerous because there is a lack of a theoretical basis and an absence of logical progressions. This not only negates the effectiveness of the program, but also may pose both physical and psychological stress for the participants. A handbook would help to clarify and diminish the possibility of these risks. In addition, safety precautions would be practiced on a more regular basis.

Statement of the Purpose

The primary purpose of this project is to create a handbook of initiatives that will serve as a resource and guide for groups or companies interested in developing their own EBTD programs. This handbook may serve as a guide for nonprofessional facilitators such as (a) human resource personnel, (b) teachers, (c) counselors, and (d) youth group leaders. The handbook is useful because all initiatives are laid out in a comprehensive and progressive manner, with explanations and objectives that correlate with each initiative.

Delimitations

This project is delimited to (a) creating a handbook of initiatives to be used in EBTD programs, (b) reviewing the literature on experience-based learning and outdoor training programs, and (c) creating a survey to assess its effectiveness as a training tool.

Limitations

This project is limited to (a) developing and modifying initiatives available within the public domain, (b) initiatives which are ground-based or low-ropes, (c) not assessing the effectiveness of EBTD programs in general, and (d) assessing the effectiveness of the handbook as a training tool and resource guide.

Assumptions

There are two basic assumptions made in this project. First, EBTD programs will become increasingly popular in the future. Second, the particular initiatives created for the handbook are based on initiatives that have been widely used.

Definitions

The following definitions are used throughout this project and the handbook as well as within all EBTD programs. The definitions presented are within the context of an EBTD program.

1. Risk-taking: a measure of how risk averse a person will tend to be in an organizational setting (Long, 1987).

2. Problem solving: one's ability to consider all aspects of the problem and to reach the best possible solution. This includes the ability to involve other people in reaching the best solution (Long, 1987).

3. Teamwork: the ability of a person to effectively interact with peers and fellow workers to achieve a goal (Wagner, 1991).

4. EBTD: programs designed to meet individual corporate and/or group objectives, using outdoor experiences to improve teamwork, risk-taking, leadership, and communication skills (Kuryllowicz, 1989).

5. Initiatives: exercises and/or activities that offer a series of clearly defined problems to solve, and which are designed so that a group must employ cooperation and some physical effort to gain a solution (Rohnke, 1984).

Summary

The success of an EBTD program with a group or an individual is largely dependent upon the (a) trainer or facilitator, (b) the willingness or openness of the group to accept change within their organization, (c) how well the initiatives are suited to the group, and most importantly, (d) how much transference occurs to real-life situations.

The initiatives discussed in the handbook have been created through the author's involvement with EBTD from 1988 to 1993. These initiatives are real problem solving tasks that take place in real time, and which have real and clear-cut consequences. There is no ambiguity about success or failure. The tasks do not replicate workplace-specific situations. Instead, they are selected to represent or have

a metaphorical relationship to the issues and processes that come into play in managerial and/or group settings. The distractions and extraneous aspects of the workplace are eliminated or diminished, giving the salient aspects clarity and focus. This is the rationale for the unusual and fantasy formats that are synonymous with the EBTD approach (Neffinger, 1990).

What are known as "ground initiatives" and "low-ropes courses" are the two groups of initiatives that will be created. Ground activities are initiatives in which participants do not leave the ground for any length of time. Low-ropes courses are initiatives where the participants are suspended or moving on the ropes. The ropes are generally at a maximum of two feet above the ground. Since each group is different, i.e., has its own needs and personality, the initiatives must always be tailored for the group. The initiatives are presented in the manual with an explanation of the most common situations for which they would apply. The practitioner or group leader will have to modify his or her approach according to the group situation.

This project will not attempt to assess the effectiveness of EBTD programs or of individual activities. There is clearly a need for further empirical research into this area. In addition, no attempt was made to evaluate the effectiveness of one activity over another. Descriptions

will include (a) the purpose of each activity, (b) its
safety requirements and considerations, (c) the behavioral
modifications the initiatives promote, and (d) appropriate
processing questions.

CHAPTER 2

Review of Literature

This review of literature will explore the historical
and theoretical foundations of Experience-based Training and
Development programs (EBTD). The Outward Bound School will
be examined in detail. Other organizations and individuals
which have been instrumental in furthering the practice of
EBTD programs will be investigated. Sample programs,
learning models, and current trends will be examined to show
the need for EBTD programs and the need for new initiatives
that may be used within a wide variety of applications.

Historical Foundations

EBTD has its roots in a wide diversity of settings and
movements. These include (a) progressive education, (b)
holistic education, (c) vocational education, (d) career
education, (e) clinical training, (f) internships, (g)
alternative education, (h) physical education, (i)
developmental theory, and (j) moral and ethical development
(Kraft, 1986).

John Dewey was perhaps the first educator to value
experience as an important tool in knowledge acquisition.
Dewey concludes his book Experience and Education with a
chapter titled "Experience: The Means and Goal of
Education." In this chapter Dewey argues that "Education in
order to accomplish its ends both for the individual learner

and for society must be based upon experience-- which is always the actual life experience of some individual. The educational system must move one way or another, either backward to the intellectual or moral standards of a pre-scientific age or forward to ever greater utilization of scientific method in the development of the possibilities of growing, expanding experience. . . ." (Dewey, 1938 p. 29).

Dewey's theory and ideas are just one example of early educational theory utilizing real experiences as the basis for learning (Kraft, 1986).

Outward Bound

The first attempts at creating challenging outdoor experiences for group and individual growth are generally credited to Kurt Hahn, a German nobleman. Hahn fled Hitler's Germany in the 1930s. He went on to develop the Gordonstoun School in Scotland, dedicated to developing students' inner resources through outdoor experiences. When World War II began, Hahn started a school on the Welsh coast to give young British sailors a one-month course in marine skills and survival training. He called the school "Outward Bound," a phrase that was used by sailors when they journeyed from safe harbor (Kraft, 1986). Hahn's model of a school was influenced by his readings of the Greek philosopher Plato. This concept was adopted by the Civilian

Conservation Corps, which was a New Deal program that hired unemployed people.

In the early 1960s, a group of Colorado businessmen who admired Hahn's progressive educational ideas and methods formed the Colorado Outward Bound School. The basis for the school was to use the mountains as a classroom to (a) produce a better individual, (b) to build character, and (c) to instill the intensity of individual and collective aspiration on which society depends for its survival. Outward Bound's emphasis on physical challenge is not an end in itself, but an instrument for training the will to strive for mastery. There is also the insistent use of action, instead of states of mind, to describe the reality of the individual. The common thread running from Plato through Hahn and through Outward Bound is the responsibility of an individual to make his or her personal goals consonant with social necessity. Hahn took from Plato the idea that a human being cannot achieve perfection without creating social harmony to sustain the harmonious life of the individual. Not only is the part subordinated to the whole, but the part cannot even understand its own identity, its relations, or its responsibilities, until it has grasped the nature of the whole. This concept is the overall structure of the argument in Plato's Republic. It is also the most important lesson of an Outward Bound course, the lesson

without which personal development has questionable value (James, 1986).

Outward Bound began its management training program in the 1970s when Outward Bound alumni asked the school to design courses for their companies. Today each course is custom-designed for a corporate or nonprofit group, based on its desired focus and objectives. Most corporate Outward Bound courses nationwide and 90% of the Colorado Outward Bound School corporate classes are designed to foster executive team building (Willis, 1985).

Some of the corporations and organizations that have sent employees or members to Outward Bound courses across the country are (a) Carnegie-Mellon University, (b) Eastman Kodak, (c) Boeing, (d) Johnson Wax, (e) General Motors, (f) Boise Cascade, (g) Rolls Royce, (h) Martin Marietta, and (i) AT&T. Although Outward Bound has primarily seen manufacturing and service-oriented firms participate in the course, the program's applications are broad-based.

Outward Bound believes a better team can be built in two ways: (a) by working on task orientation skills, such as helping employees to become better planners and strategic thinkers, or (b) by working on the process side of team intervention which teaches employees to be better communicators and to develop trust for each other. A typical program lasts 4 to 9 days because the company's

philosophy is that team building cannot be learned in a day.
By examining what happens to oneself under duress in a
controlled situation, employees can learn and build from
newly acquired self-knowledge allowing them to become much
more grounded in the relationship between what they think
and what they do, when they return to work. Because there
are few direct relationships between work and outdoors, much
of the learning is symbolic and occurs within metaphors
(Laabs, 1991).

In a survey of the Martin Marietta course in 1981,
Harmon Associates found that employees came back to work
more self-assured, with better morale, and with an enhanced
sense of teamwork. They also tended to remain with the
company for longer periods of time. In an independent
survey of corporate course participants in The Colorado
Outward Bound School in 1983, 88% felt they were now better
prepared to handle their job responsibilities, while 76%
believed they were more fit and/or better able to interact
with co-workers and handle stress (Willis, 1985).

<u>Project Adventure</u>

In 1971, Project Adventure was created in Hamilton,
Massachusetts to offer an on-site Outward Bound-type
experience for high school sophomores. In addition to
Outward Bound, Project Adventure has been another

influential group within EBTD. Project Adventure's programs follow several specific guidelines.

First, they have found that a group will be more productive if time is spent on some type of goal-setting activity prior to beginning the actual initiatives. This helps the group clarify what they will be doing during the activity and what they hope to derive from it.

Secondly, all the participants have the opportunity or choice to say no to any of the activities. A no choice is deemed to be a sign of strength, not weakness allowing the activities to be important insofar as how they affect the individuals.

Lastly, it is essential that a sense of good spirit and fun be maintained throughout the program. This helps to foster an ideal environment whereby a person's or group's integrity may be challenged safely (Rohnke, 1989).

During the late 1970s and early 1980s, a myriad of other outdoor training programs specifically aimed at corporate personnel proliferated. Formal presentations about EBTD were offered at many professional conferences. Since 1985, interest in outdoor training has soared, along with the growing debate over its effectiveness as a training tool (Wagner, et al., 1991).

Theory and Components

EBTD programs are filled with metaphors, symbols, feelings, and typical behavioral patterns. Participants involved in an adventure-based activity are engulfed and at times, overwhelmed with new stimuli. Often there are new activities, intense emotions, new environments, and new personal relationships. Frequently the experience engenders in participants feelings of (a) fear, (b) anxiety, (c) exhilaration, (d) exhaustion, (e) peaceful solitude, (f) camaraderie, (g) pain, (h) anger, (i) alienation, (j) sadness, (k) frustration, and (l) joy. These programs are designed to allow these feelings to be experienced in a clearer, more intense manner than they are at home or work. The uniqueness of these feelings and experiences allows the group members to see themselves and their individual potentials in a different fashion. Physical, mental, emotional, spiritual, and environmental awareness are magnified, resulting in new learning and growth-producing experiences (Nadler & Luckner, 1992).

The following are eight components which Nadler and Luckner (1992) feel are necessary for a program to be effective:

1. The Student: Students come to the course with a preconception of what an experience is going to be. Generally, the expectations that they arrive with set the

stage for a meaningful learning opportunity. For some
students the anticipation causes a sense of internal
stimulation. Other students do not experience this feeling
until they are immersed in the activities. This internal
state that permits learning to occur is referred to as
disequilibrium.

2. Disequilibrium: Disequilibrium refers to an
individual's awareness that a mismatch exists between old
ways of thinking and new information. It is this state of
internal conflict that provides motivation for an individual
to make personal changes. Disequilibrium must be present
for learning to occur. By involvement in an experience that
is beyond one's comfort zone, individuals are forced to
integrate new knowledge or reshape preexisting perceptions.
These qualitative and quantitative changes are referred to
as the process of accommodation and assimilation. Students
experience the state of disequilibrium by being placed in a
novel setting.

3. Novel Setting: This refers to placement in an
environment that one is not familiar with that facilitates
the breakdown of individual barriers. When this factor is
combined with the immersion into a group of virtual
strangers, a heightened level of arousal develops. The
underlying conditions of: (a) effort, (b) trust, (c) a
constructive level of anxiety, (d) a sense of the unknown,

and (e) a perception of risk are integrated within a cooperative environment.

4. Cooperative Environment: This establishes an atmosphere and method of teaching that makes use of cooperative rather than competitive learning while fostering opportunities for students to develop group cohesiveness. This bonding is cultivated through a structure that focuses on shared goals and the provision of time for interpersonal and intrapersonal communication. This foundation exists while each individual and the group are constantly presented with unique problem-solving situations.

5. Unique Problem-Solving Situations: New skills and problem-solving situations are introduced to students in a sequence of increasing difficulty. The learning opportunities are concrete and can be solved when group members draw on their (a) mental, (b) emotional and (c) physical resources. Completion of such tasks leads to feelings of accomplishment.

6. Feelings of Accomplishment: Success can lead to increased (a) self-esteem, (b) an increased internal locus of control, (c) improved communication skills and (d) more effective problem-solving skills. The meaningfulness of these success experiences is augmented by processing the experience.

7. Processing the Experience: Students are encouraged to reflect and, in some manner, express the thoughts and feelings they are experiencing. Processing is essential if there is going to be transfer of learning.

8. Generalization and Transfer: The ultimate goal of the adventure-based experience is to assist students in providing their own linkages, bridges, and connections to what they are learning so they can integrate their personal insights and desired behaviors into their lifestyle during the remainder of the course and when they return home (Nadler & Luckner, 1992).

These eight theoretical components are environments which must exist for change and growth to occur. Ideally, these components should be present within all models.

EBTD's Context in the Workplace

In order to put the EBTD approach into perspective and context, the realm of managerial skills must be explored. By definition these skills tend to be formal rather than technical. Many different classification schemes for managerial skills have been proposed. Most encompass traditional topics such as (a) goal setting, (b) strategic planning, (c) supervision, and (d) leadership (Mann, 1965; Waters, 1980). They include both task skills and interpersonal skills, however they usually exclude self-management and renewal skills. Most employers consider

these to be inelastic and within the private realm of the employee (Neffinger, 1990). EBTD programs try to affect these so-called inelastic realms.

Although programs differ from instructor to instructor, they work essentially the same by helping employees overcome internal obstacles and differences to more efficiently meet the demands of the marketplace and satisfy customers. These are two unbreakable laws in today's Darwinian business climate (Dingle, 1989). A survey by Opinion Research Corporation found that while young managers are prepared quantitatively, they lack good interpersonal skills and the ability to think critically. As a result, corporations are spending $210 billion a year for employee training programs. These expenditures are greater than all other education programs in the nation including elementary and secondary school instruction (Dingle, 1989).

According to Jordan (1988), the most successful companies today employ the following innovations:

1. They encourage their leaders to use intuition and vision.

2. They do not bemoan the loss of the work ethic, but rather herald the new "work should be fun" notion.

3. They transform employees into entrepreneurs with stock options and other employee incentives.

4. They recognize the connection between corporate life and the other aspects of people's lives.

EBTD programs help achieve these goals and attempt to move troubled, stagnate corporations into a more competitive position.

Proponents of EBTD see it as an ideal blend of cognitive learning and interactive involvement by the participants. Many people feel that the outdoor setting itself facilitates the breakdown of old patterns of thinking and behaving. It also allows the students to explore new possibilities in their interactions with other people, as well as in how they approach their job. In addition, the experience itself can have a very deep personal and emotional impact on participants, an impact which cannot be found in typical classroom training (Jordan, 1988).

Corporate America is responding to the new business challenges by seeking a way to create a core group of corporate leaders who will take the nation into the next century, as well as strategists who can develop a comprehensive agenda, tackle complex problems, harness resources, and motivate people (Dingle, 1989).

Experiential Learning Models

There are several experiential learning models which most EBTD programs are based upon. According to Nadler and Luckner (1992) there are four distinct phases that comprise

the learning cycle. These are (a) experience, (b) reflection, (c) processing, and (d) application which leads back to experience (Nadler & Lucker, 1992).

Another model, based on the theories of Kolb (1975), Miles (1972), Dewey (1938), and Foshay (1972), begins with an experiential indoor or outdoor program. The experience was designed around problem solving and creativity goals. There are nine essential steps that are associated with the return to the workplace and follow-up (Roland, 1992). The nine essential steps developed by Roland, 1992) are:

1. Experiential Activity (A): Participants are immediately given a problem to solve in their respective group. The problem demands immediate, practical solutions rather than theoretical ones. Participants are challenged cognitively, emotionally, and somewhat physically (Foshay, 1975). At this point, participants typically begin the problem-solving process in a haphazard fashion, with minimum communication occurring between individuals. There is a slight possibility that a participant might make a direct link between experiential activity and the formation of an abstract concept.

2. Selecting (B): Participants must consider and attempt new actions which help solve the given problem. As Miles (1972) notes, "This step is crucial for learning to take place, for it requires the learner to think creatively,

enabling him or her, for example, to actually consider the possibility of behaving differently--and how" (p. 35). At this stage, participants experiment with a variety of actions to see which individual or groups work the most effectively and efficiently. Participants are also beginning to understand each person's strengths and weaknesses and how each person fits into the group (Roland, 1992).

3. Debriefing (C): Once the participants have finished their attempt at solving the problem, a thorough "debriefing" session is held where facilitators help the group reflect on issues (sometimes surfaced via metaphor) and encourage participants to analyze their own problem-solving style. Kolb (1974) describes this as "observations and reflections." Typically, the group agrees upon a systematic process in which to try other problems (Roland, 1992).

4. Practicing (D): Miles (1972) notes that participants must practice their ideas to see if they will work in other situations. The outdoor experiential participants engage in practice, allowing for numerous opportunities during the program to try out their systematic problem solving process. After each problem, the group debriefs its solution and works to perfect this process (Roland, 1992).

5. Formation of Abstract Concepts (E): In small and large group meetings (including solos, dyads, and triads), participants discuss the transfer of the experiential learning to the workplace. Specific issues are identified, discussed, debated, and prioritized. Action plans are then developed in order for participants to maximize the transference. The follow-up program will often be designed to hold participants accountable for review and update of these action plans (Roland, 1992).

6. Testing, Applying, Integrating (F): The learning theory now carries over to the workplace, as noted by both Miles (1972) and Kolb (1975), where participants begin testing, applying, and integrating their learning. Some of this learning can occur subconsciously, for example participants who said they did not learn from the training actually have learned. Usually this step is not an actual part of the training program requiring participants to be responsible for the testing, applying, and integrating. However, some organizations utilize this step as an actual part of their training process allowing participants to test their learning and to bring back their findings to the training sessions (Roland, 1992).

7. Feedback from Subordinates and Superiors (G): A training program that expects transfer to take place must get feedback from other employees in the organization. Each

participant will get some feedback for his/her attempts at putting his/her learning into practice. Feedback usually occurs in a verbal form and nonverbal form (Roland, 1992).

8. Debriefing (H): Once the participants test out their theories and receive feedback from subordinates and superiors, they now have the opportunity to discuss the results in a training session (Roland, 1992).

9. Formation of Abstract Concepts (I): During this phase, the managerial concepts are discussed at the workplace. In-house trainers and/or consultants discuss with participants how and why some of their learning, including that from the experience-based program, is successfully or not successfully transferred to the everyday work setting. This cycle is repeated throughout the training follow-through period (Roland, 1992).

Project Adventure, in its book Cowstails and Cobras II, presents another model:

1. Group Formation: Choose group members (if there is a choice) with a common issue and/or goal, who mix well, who have similar mental and physical abilities, while considering the intensity of the experience.

2. Selecting Appropriate Activities: At this time in the program the concept of sequencing comes in. Sequencing means correctly selecting activities at any given time for any given group, as well as their timing.

3. Briefing: The briefing is an information session at two levels. First, safety information and instruction which are non-negotiable are discussed. At the second level, information is shared during which there is (a) give and take, (b) goal setting, (c) clarification, and (d) framing. Framing is the process of communicating any given task boundaries, i.e., if someone touches a rope, they become mute.

4. Leading: Leading the group is important because the group will not have a sense of direction and purpose if no leader is appointed. Often there are activities prior to that during which a leader will emerge as well as initiatives which require situational leadership. The leader is always an active member of the group and is chosen because of his or her relationship to the group outside of the activities.

5. Debriefing: This is the last leg and involves meeting with the group and finding out "what it all means." Debriefing should always be part of the activity.

A third learning model, which was proposed by D. A. Whetten and K. S. Cameron (1984) in Developing Management Skills, consists of five elements:

1. Skill Pre-assessment: Examines the participants' current level of knowledge and skill competence.

2. Skill Learning: Teaches correct principles and presents the rationale for specific behavioral guidelines.

3. Skill Analysis: Provides an example of appropriate and inappropriate skill performance and analyzes behavioral guidelines and why they work.

4. Skill practice: Gives trainees the chance to practice the behavior guidelines and adapt them to their personal styles, while receiving feedback and support for attempting new behaviors.

5. Skill application: Helps transfer learning to real-life situations and fosters ongoing personal development.

To apply this model to an EBTD program the five stages may be (a) needs analysis, (b) pre-outdoor, (c) outdoor, (d) post-outdoor, and (e) evaluation. Careful attention to all five stages and their sequence is critical for an effective EBTD program (Buller et al., 1991).

<u>EBTD Program Characteristics</u>

Although each EBTD group has developed its own uniqueness, most of them are based on these models or are similar to the ones presented here. These models share two essential characteristics of experience-based learning. The first characteristic is simply: learning by doing. This is different from traditional pedagogic methods that involve reading and lecture, and more recently, simulation via role playing and case studies. Effective or useful as both of

these traditional approaches are, they may fall short with respect to immediacy and reality. Lecture and/or reading is totally cognitive; simulation is ultimately pretend. EBTD activities are very real and have clear-cut objectives and consequences (Neffinger, 1990).

The second essential characteristic of experience-based learning is the presence of real and intensified affective context for the task or project. That is, there must be a high degree of personal commitment and investment in achieving the desired outcome when participating in the assigned task. This characteristic accounts for the need to have the task presented as (a) intriguing, (b) difficult, or (c) even dangerous. The challenging and/or stressful aspects of the task are designed to get adrenaline flowing in order to catalyze the learning (Neffinger, 1990).

The outdoor setting, which is frequently used with the experience approach, is an important but not essential characteristic. The outdoors allows many options for devising the detailed and original tasks that are important for clarity and for neutralizing prior experience. From an affective point of view, the natural outdoor environment has a potent and evocative character that amplifies the affective component (Neffinger, 1990).

A Sample Program

Described here is a typical program that the author has used extensively in her work with corporate executives. The activities and initiatives mentioned here are all described in the handbook. This program normally takes place in one 8 hour day. The facilitator, generally responsible for 8 to 12 people, begins by discussing the group's goals for the program. This may or may not take place outdoors and gives the facilitator a chance to actively observe the group's dynamics. Group dynamics are important for the facilitator to be aware of because they can explain certain behavioral traits throughout the process. For example, during this discussion it will probably become clear who talks the most, who is listened to the most, who is the workplace manager, and who are the quiet followers. Few rules are given because too many rules and restraints may kill the creative problem-solving process.

Next, the participants are gradually introduced to the experiential process and their learning environment. Often incorporated into this section are a series of warm-up exercises. The participants are taken through some physical and mental exercises to prepare them for the more challenging activities which lie ahead. Usually "trust" activities are used. Trust is an important issue to address because if the participants do not have a sense of trust

within themselves and the group, it will be difficult for them to fully realize their potential as well as the group's potential. Trust is a delicate subject, but it can create a level of comfort that will encourage participants throughout the process (Wagner, 1991). Initiatives such as the trust walk, trust fall, and trust circle are often appropriate for building and creating trust.

The next phase will focus on several initiatives that gradually build on the teamwork theme. The Fisherman's Net is an appropriate initiative for this phase. Often it is at this time that the facilitator will make the participants who have been doing all the talking and decision making mute and/or blind. This will encourage the quieter participants to become situational leaders and it will force the mute and blind participants to trust others in decision making.

The next step is the last initiative. This initiative usually takes (a) a lot of preparation, (b) decision making, and (c) planning by the team. Sometimes teams will jump into this step without much preparation beforehand which may be an acceptable alternative. Trail-Full-O'-Acronyms is useful for this stage. These may be used individually or combined into one large challenge course.

Finally, the processing takes place. Processing is a qualitative discussion period that allows participants to analyze their efforts to solve problems and act cohesively

as a group. It is a critical step in applying the outdoor experience to the workplace (Wagner, 1991). The facilitator will make some suggestions based on what was observed. However, throughout the actual initiatives phase, the facilitator is mostly an observer.

<div align="center">Current EBTD Program Trends</div>

EBTD programs encompass a wide range of activities. Wagner et al. (1991) conducted a survey which produced the following results: of the programs surveyed (number of programs is not given), 23% were wilderness programs and 77% were outdoor-centered using ropes or challenge courses similar to the example. All of the participants in the wilderness programs were top executives or middle managers. In the outdoor-centered programs, 70% were top executives or middle managers, 20% were sales representatives or supervisors, and 10% were other non managers. The companies surveyed sent between one and 75 employees per year to wilderness programs, with an average of 15. For the outdoor-centered programs, companies sent from 20 to 5,000 employees. The average number of employees being sent per company was 250. Wilderness programs cost from $1,500 to $4,000 per participant with an average cost of $2,800. The outdoor-centered programs cost $65 to $200 per person, with an average cost of $95 per person. The employer is always the sponsor.

Summary

The intent of this review of literature was to examine the status and development of EBTD programs and to present reported advantages of these programs. The history and theoretical basis for EBTD programs was also investigated. A group of eight theoretical components was presented as a basis for all models. Several models were identified and a brief discussion of each was presented. These models provide a framework within which the practitioners are able to develop custom programs in addition to providing a logical and consistent order to the programs. A set of three characteristics was presented to show the underlying similarities of most programs. The reasons and forces behind the current trends and demand for EBTD programs in the corporate world were reviewed. A step-by-step description of a sample program was presented to show the actual process. Finally, a survey was reviewed to show the current number of programs, type and number of participants, and the costs associated with participation. EBTD programs are more than a fad (Wagner, et al., 1991). They will more than likely qualify as an effective tool for organizational development in a variety of settings.

CHAPTER 3

Procedures

The intent of this project was to create a handbook of new initiatives for EBTD programs. An EBTD handbook that provides new initiatives may offer a new approach to training and development. Using the initiatives in the handbook, any group wanting to increase: (a) teamwork, (b) leadership communication, and (c) trust skills, could create its own programs and greatly enhance employee and group performance.

Procedures that were necessary in completing this project included (a) adoption of a learning model appropriate for EBTD, (b) creation of new initiatives and activities that would lead to organizational change and growth, (c) development of a pilot handbook, (d) a means to evaluate the effectiveness of the pilot handbook, (e) development of a comprehensive handbook based on the survey information from the pilot handbook, and (f) a means to evaluate the effectiveness of the final handbook. Methodologies for each of these procedures are presented in this chapter.

Learning Model

Karl Rohnke (1989) provided the learning model which was adopted and used as a framework within the handbook.

This model was chosen because it was (a) specifically
designed and developed for EBTD initiative programs and (b)
the user of the handbook may find it easy to understand and
adapt to a program. This model was developed by Rohnke
specifically for EBTD programs and has five distinct phases:

1. Group formation.

2. Selecting appropriate activities.

3. Briefing the group.

4. Leading the group and.

5. Debriefing the group.

This model was presented in detail in Chapter 2. This
model, when used as a base for an EBTD program, creates a
logical and practical progression within the program.
Practitioners could insert any of the initiatives or entire
programs into this model.

Initiative Creation

The activities and initiatives were created and refined
by the following methods: (a) the author's six-year
experience as a facilitator of EBTD programs, (b) the
observation of other EBTD facilitators and programs, and (c)
adaptations from the books Cowstails and Cobras II, Silver
Bullets, and New Games.

Author's Experience

The author was employed as a Director of
Recreation for a corporate conference center in Northern

California from 1987 through 1992. During this period, the opportunity arose to create new initiatives and refine and adapt old initiatives. The author has facilitated EBTD programs for over 60 different groups including (a) corporations, (b) civic groups, (c) teachers, (d) attorneys, and (e) physicians. These initiatives were created to fill a need for challenging experiences that developed or encouraged (a) team cohesiveness, (b) communication, (c) leadership, and (d) problem solving. All the initiatives are described in detail in the handbook (see Appendix B).

Personal Observation

During the time the author was employed at the corporate conference center, the opportunity arose to observe several EBTD groups. The groups included (a) Catalyst Consulting, (b) Project Adventure, (c) Pecos River, and (d) Growing Edge. These groups are all well-known in the field of EBTD.

Adaptations

The three books which were used as reference sources are Silver Bullets, Cowstails and Cobras II, and New Games. These books contain most of the initiatives that are commonly used in EBTD programs at the present time.

Pilot Handbook

A pilot handbook (see Appendix C) was created to solicit information from experts in the field. The pilot

handbook contained (a) newly-created initiatives and adaptations of old initiatives, (b) guidelines for working with groups, and (c) some processing questions.

Method of Evaluation

The effectiveness of the pilot handbook as a source of information for EBTD programs was evaluated by a group of experts from the following fields: (a) education, (b) corporate development, and (c) outdoor education. A total of eight participants was randomly chosen from a population selection of 20. Evaluators were mailed a letter with the survey. A follow-up telephone call took place to confirm that the evaluator received the survey. The evaluators were asked to return the questionnaire within 7 days.

Each evaluator was asked to respond to a survey questionnaire (see Appendix A). The questionnaire consisted of approximately eight statements. The responses to these statements were based on a 5-point Likert scale. There was also an open-ended comments section at the end of the questionnaire. The questionnaire sought information regarding: (a) the subject's familiarity and experiences with EBTD, (b) the frequency of use of EBTD programs within their workplace, (c) the pilot handbook's effectiveness as a training tool, and (d) changes to improve the effectiveness of the pilot handbook. The suggestions for improvement were incorporated into the final handbook.

Handbook

A handbook was created from the results of the survey of the pilot handbook.

Method of Evaluation of the Handbook

The final handbook was evaluated using the identical survey as the pilot handbook. The surveyed population will be randomly selected from a group of 50 persons. The information received from the survey of the final handbook was an evaluation of its effectiveness as a training tool and resource guide.

Summary

An EBTD handbook may provide a comprehensive approach to organizational development. The pilot handbook was based on a learning model, observation, a survey, and personal experience. The pilot handbook was evaluated by experts in the field. A revised handbook was created based on the survey results. The revised handbook was sent out to a randomly-selected population with the same survey, and the results of that survey were noted.

CHAPTER 4

Results and Discussion

Introduction

The purpose of this study was to create a handbook of
initiatives that would be used as a tool and resource guide
for organizational training and development. As discussed
in Chapter 3, there were two separate phases of evaluating
the effectiveness of the handbook as a training tool and
guide: (a) a pilot handbook was created and sent to a panel
of experts for evaluation; and (b) a final handbook was
created based on the results of the pilot study.

Results of the Pilot Handbook Survey

The pilot handbook was sent to a panel of 11 experts in
the field of experience-based training and development (see
Appendix B, p. 60). Four of the 11 experts were Directors
of Training and Development for large corporations in the
San Francisco and Silicon Valley areas. The remaining seven
were professors employed in the business departments of
various universities throughout the United States who have
published research specifically within the field of
experience-based training and development.

Six out of the 11 surveys (55%) were returned.
Appendix D (p.81) contains a survey of the raw data. The
results are displayed in Table 1.

Table 1

<u>Pilot Handbook Survey Results</u>

Question #	Strongly disagree	Disagree	Undecided	Agree	Strongly agree
1	0	0	0	2	4
2	0	0	0	1	5
3	2	0	2	1	2
4	1	0	1	2	2
5	2	1	0	2	1
6	2	2	2	0	0
7	1	1	1	1	2
8	1	0	2	0	3

In addition to the Likert scale response, the survey asked for comments at the end of the survey. Eighty-three percent of the respondents wrote comments. The comments were as follows (individual surveyor's names were kept confidential):

A good attempt at illustrating EBTD exercises--but you need more in-depth information regarding <u>design</u>--How can each exercise be designed in order to be <u>relevant</u>? How can they be meaningful in various training topics, e.g., team development, diversity, leadership

development, quality, etc. The illustrations convey fun and games vs. serious business applications. Fun is important--but business relevancy is absolutely critical. I would recommend a strong introduction-- explaining that the exercises are only a framework-- much homework needs to be done--including a needs assessment--in order to make each and every exercise relevant and meaningful to that specific group, i.e., a customized approach. This is a good start--best wishes for a successful completion.

Your book is a possibly useful tool. As it currently is written, though, it is <u>too superficial</u> and <u>not clearly organized</u>. I would go so far as to say that in the wrong hands it could be <u>dangerous</u>, both physically and psychologically.

"Simply using Book of Initiatives is a waste of time, effort, and money. Facilitators need to be trained in development and corporate issues."

"I feel very strongly about having a professional facilitator. Most of the time things go well. But when they don't, you need someone who can handle the difficulty."

You're taking a very complex training methodology and simplifying it--suggesting that anyone could follow the book and lead groups. I think it is oversimplified-- the dynamics of the tasks are not explained--cookbooks are dangerous!! Processing section is much too short and canned. I have lots of ethical and professional questions about this.

Changes Made to Pilot Handbook

The results and suggestions from the survey were then used to modify and expand the pilot handbook. The handbook was amended to be used not only as a working resource when developing a program, but also as a guide to choosing an outside facilitator. These amendments were developed and incorporated because of concern, by the expert surveyors, about a nonprofessional facilitator using the handbook to develop and implement a program. Additionally, a foreword was added to explain the potential dangers of a nonprofessional facilitator running a program without proper training. Two sections were added to the handbook: "How Does EBTD Work?" and "Program Planning." The section entitled "How Does EBTD Work?" was added to explain the theories and basis behind EBTD. This new addition addresses concerns expressed in the survey in relation to the importance of the facilitator having some background theory and theoretical basis for developing a program. This

section is also useful for determining if EBTD is the right tool for a group. The other new section entitled "Program Planning" was added to help the reader both design an effective program and/or choose the right facilitator. This section also reinforced the concerns, expressed in the survey, of nonprofessional facilitators running a program. In addition, the "Program Planning" section serves as a framework for the development of a thorough program; an issue discussed by one of the respondents. The final version of the handbook is located in Chapter 5.

Results of the Handbook Survey

The final edition of the handbook was sent out to 32 individuals. Each of these evaluators also received the same survey used for the pilot handbook. These evaluators were chosen randomly from a group of 50. The group contained people from the following fields: (a) corporate training directors, (b) teachers, (c) recreation leaders, (d) youth group leaders, and (e) counselors. The individuals were selected as potential users of the handbook. Seventeen (53%) surveys were returned. Appendix D (p.81) contains survey raw data. The results are in Table 2, which follows.

Table 2

Revised Handbook Survey Results

Question #	Strongly disagree	Disagree	Undecided	Agree	Strongly agree
1	1	0	6	7	3
2	12	0	0	3	2
3	0	0	10	4	3
4	0	0	0	15	2
5	0	4	5	8	0
6	0	9	0	8	0
7	0	2	5	10	0
8	0	0	5	8	4

In addition to the eight questions, the survey contained an open-ended comment section. Eight people (47%) commented on the handbook. The comments were as follows:

"To be effective you need a Table of Contents and a Glossary. Also, assuming that the leader 'alpha male' will usually be a male is sexist and does not belong in a handbook."

"The booklet is easy to follow if you've done a lot of EBTD before. I showed it to one of my trainers who felt the

initiatives needed more detailed information for him to feel comfortable doing them."

"I would not use these without a professional facilitator."

"It appears that copyright laws have been broken. If you did the illustrations yourself, they are very good--illustrate initiatives well."

"Formatting of introduction needs improvement. See Ausbel's work on 'advance organizers.'"

"Indicate context of the experience, target audience."

"Good 'Bullet' format."

"Ideas are excellent but could be condensed to a tighter/cogent format."

The results of both surveys will be compared and contrasted.

Discussion of Pilot Handbook Survey

The first survey of the pilot handbook was sent to experts in the field (see Appendix B, p. 60). These experts have done research and published extensively in the field of experience-based training programs. This is supported within the survey in their response to Questions #1 and #2 which deals with their familiarity of EBTD programs. The respondents all strongly agreed that they are both familiar with and have used EBTD programs. They are also theorists who may or may not facilitate EBTD programs in the field.

This point is important because theory and practice are often at odds. The responses to the first two questions were the only areas where there was a consensus. The first two questions dealt with the respondent's familiarity with EBTD programs. Throughout the rest of the survey the responses varied widely with the exception of Question #6 which asked the respondents to rate the quantity of illustrations. Here, more than half of the experts felt that the number of illustrations were sufficient. In response to Question #8, half of the respondents strongly agreed that they would hire a professional facilitator to conduct the training. The may be because they are professional facilitators and view their role as essential to a successful program.

Most of the comments made by the respondents were concerned with the idea that untrained people might attempt to facilitate the initiatives based on their reading of the handbook. Four of the six respondents expressed very strong comments regarding their concern about not using a professional facilitator. Two of the respondents felt that it would be dangerous to allow nonprofessionals to use the handbook. These concerns may also indicate that the respondents feel their roles as facilitators to be essential to a successful program.

Discussion of the Final Handbook Survey

The second survey was sent to a variety of people who may be potential users of the handbook. While their responses were generally varied, there were several questions where there were consistencies. Over half of the respondents were familiar with EBTD programs. However, over half of the respondents indicated that they had never used EBTD as a training tool. This may be because EBTD is not widely used by populations outside large corporations. More than half also felt undecided about the usefulness of the initiatives as a training tool. This may again indicate the respondent's lack of familiarity with EBTD. A large percent (88%) felt that the booklet was easy to follow. Finally, over half of the respondents felt that the handbook needed more text. This may also be attributed to their lack of understanding of EBTD and therefore, need to have more written information about it.

The comments were generally positive. More of the comments seemed to be focused on the formatting of the handbook and not on the content. One respondent was concerned with copyright laws being broken. This may have referred to the illustrations. These illustrations are property of the author and, therefore, no copyright laws were broken in this regard. The respondent's concern with format may also be attributed to their lack of knowledge of

EBTD programs. This lack of knowledge would make it difficult to comment on content.

The Surveys Contrasted

The two populations responding to the handbook are different, and thus have different objectives and ideas about EBTD. The panel of experts was very concerned about using a professional facilitator and the negative consequences of not using one. While it may be of concern that physical harm can occur if an untrained person facilitates these initiatives, psychological harm is questionable. These initiatives derive their meaning from what is placed on them. It is the opinion of the author that the harm that can occur is: the group will have wasted their time and money. These initiatives are games which, when implemented improperly, may be of little value, but rarely are they psychologically damaging. The respondents concerned with this issue concentrate mainly on corporate training, and therefore might not see that the initiatives may be used for fun and in a variety of settings.

The second survey respondents, who were persons that may use a tool of this sort, received a revised version of the handbook. In addition, the second group of surveyors were chosen from a different population. They were chosen because they may be potential users of the handbook. The first surveyors were experts in the field whose purpose was

to edit the handbook. They were not as concerned with using a professional facilitator as they were with the format of the handbook. Since the majority of them had not used EBTD before, they may be more familiar with traditional types of training and education tools.

Weaknesses of the Surveys

While the author has made an attempt to present a thoroughly researched handbook, the following weaknesses are acknowledged:

1. A larger field of experts would have enhanced the survey. Also, a larger response rate would have enhanced the value of the research.

2. The second set of individuals surveyed were different from the first. The revised handbook may have been sent to the original surveyors to assess the degree of effectiveness the changes had on the final product.

3. The second set of individuals surveyed were not as familiar with EBTD programs as the first group. In fact, over half of them had never used EBTD programs as a training tool. This is significant because they may not be qualified to assess the effectiveness of the handbook.

Usefulness of the Handbook as a Training Tool

Taking into consideration the strengths and weaknesses of the handbook that have been discussed, the following conclusions have been reached.

First, for the reader who is unfamiliar with EBTD, the handbook may serve as an introduction to EBTD program planning.

Second, for the professional trainer or teacher who has had organizational development training experience, the handbook may serve as a training tool provided the reader utilizes a professional facilitator to conduct the program.

Third, for the human resource professional, who wants to hire a professional facilitator, the handbook may serve as a preliminary guide.

Summary

The pilot handbook and survey were sent to 11 experts in the field. Six of the 11 responded. Based on the surveys and the recommendations of the experts, the pilot handbook was revised. The revised handbook was sent to potential users with the same survey. The results of both surveys were compared and contrasted. The weaknesses of the research was discussed. The usefulness of the handbook was discussed and found to be more narrow than anticipated.

CHAPTER 5

Conclusions, Recommendations, and Handbook

The purpose of this project was to create a handbook of experience-based training and development (EBTD) initiatives that would serve as both a training tool and as a resource guide for practitioners. The conclusions and recommendations presented in this chapter are based upon the results of both the surveys and the process of creating the handbook.

Conclusions

There are two conclusions that can be drawn from the surveys. First, the value of the handbook as a training tool is questionable. This is due to the fact that the potential user of the handbook would benefit from the use of a professional facilitator. If a professional is employed to facilitate the training, then the usefulness of the handbook as a tool is low. This is because a professional would use initiatives, processes, and knowledge of his or her own to conduct the training. He or she would not be using a handbook written for nonprofessional facilitators and he or she would most likely discourage the use of one since it may threaten their employment.

The second conclusion is that the handbook may be useful in two areas.

First, the handbook appears to have value as an introduction to EBTD for those who are unfamiliar with initiatives. Both a potential facilitator and a participant may benefit from the information contained in the handbook. If, after reading the handbook, they decide to use this type of training, they will at the very least, have an increased awareness of its potential.

Secondly, the handbook may be useful as a guide for those people who are searching to hire a professional facilitator. The handbook may give them some knowledge as to what to expect from a facilitator and how to choose a suitable one.

<u>Recommendations</u>

Based on the evidence and discussion presented heretofore, two recommendations can be given.

First, there is a need to further develop this handbook or create a new one which deals with the process of finding and hiring a competent facilitator. A handbook of this kind would not only save time and money, but also perhaps "weedout" the incompetent facilitators and develop some industry standards.

Secondly, neither the project as a whole nor the handbook discussed in detail the general effectiveness of EBTD. There is, however, a need for a standardized tool by which a group can assess the effectiveness of the EBTD

program. Given the amount of capital spent on training and EBTD programs, the validity of these expenditures needs to be justified and industry standards need to be developed.

REFERENCES

Buller, P. F., Cragun, J. R., & McEvoy, G.M. (1991).
    Getting the most out of outdoor training. <u>Training and
    Development Journal, 3,</u> 58-61.

Dewey, J. (1938). <u>Experience and education.</u> New York:
    Collier Books.Dingle, D. T. (1989). Peak performance.
    <u>Black Enterprise, 19</u>(5), 64-70.

Foshay, A. W. (1976). <u>Essays on curriculum.</u> New York:
    Columbia University Press.

Galagan, P. (1987). Between two trapezes. <u>Training and
    Development Journal, 3,</u> 40-50.

Gall, A. L. (1987). You can take the manger out of the
    woods, but. . . . <u>Training and Development Journal, 3,</u>
    54-58.

James, T. (1986). Sketch of a moving spirit: Kurt Hahn. In
    R. J. Kraft & M. Sakofs (Eds.), <u>The theory of
    experiential education</u> (pp. 39-52). Boulder, CO:
    Association for Experiential Education.

Jordan, P. (1988). Sportsmind: Peak performance for self,
    team, and business. <u>American Fitness, 12,</u> 35-41.

Kolb, D. A., & Fry, R. (1975). Towards an applied
    theory of experiential learning. In C. Cooper (Ed.),
    <u>Theories of group processes</u> (pp. 23-28). New York: John
    Wiley & Sons.

Kraft, R. J. (1986). Towards a theory of experiential
    learning. In R. J. Kraft & M. Sakofs (Eds.), <u>The
    theory of experiential education</u> (pp. 7-34). Boulder,
    CO: Association for Experiential Education.

Kuryllowicz, K. (1989). Experiential learning. <u>Meetings and Incentive Travel</u>, <u>10</u>, 13-18.

Laabs, J. (1991). Team training goes outdoors. <u>Personnel Journal</u>, <u>6</u>, 56-63.

Long, J. W. (1984). The wilderness lab. <u>Training and Development Journal</u>, <u>3</u>, 30-39.

Long, J. W. (1987). The wilderness lab comes of age. <u>Training and Development Journal</u>, <u>5</u>, 59-68.

Mann, F. C. (1965). Toward an understanding of leadership role in formal organization. In R. Dubin, G. Homans, F. C. Mann, & D. Miller (Eds.), <u>Leadership and productivity: Some facts of industrial life</u> (pp. 15-18). San Francisco: Chandler.

McEvoy, G. M., & Buller, P. F. (1991, March). <u>Evaluation of an outdoor management skills training program</u>. Paper presented at the meeting of the Western Academy of Management. Santa Barbara, CA.

Miles, M. B. (1972). How does a training group differ from other groups? In R. Hacon (Ed.), <u>Personal and organizational effectiveness</u> (pp. 34-38). New York: McGraw-Hill.

Nadler, R. S. & Luckner, J. L. (1992). <u>Processing the adventure experience</u>. Dubuque, IA: Kendall/Hunt Publishing Company.

Neffinger, G. G. (1990). Real learning in unreal circumstances. <u>Journal of Managerial Psychology</u>, <u>4</u>, 27-31.

Prud'Homme, A. (1990). Let's get physical. <u>Business Month</u>, <u>3</u>, 61-69.

Rohnke, K. (1989). <u>Cowstails and cobras II</u>. Dubuque, IA: Kendall/Hunt Publishing Company.

Rohnke, K. (1984). <u>Silver bullets</u>. Dubuque, IA: Kendall/Hunt Publishing Company.

Roland, C. C. (1992). An experiential learning model. <u>Frontload</u>, <u>1</u>(2), 2-3.

Scovel, K. (1990). Executives take to the hills. <u>Human Resource Executive</u>, <u>8</u>, 28-31.

Wagner, R. J., Baldwin, T. T., & Roland, C. C. (1991). Outdoor training: Revolution or fad? <u>Training and Development Journal</u>, <u>3</u>, 51-56.

Whetten, D. A. & Cameron, K. S. (1984). <u>Developing management skills</u>. New York: Scott, Foresman and Compay.

Willis, R. (1985). Peak experience: Managers in the mountains. <u>Management Review</u>, <u>74</u>(12), 18-23.

Waters, J. A. (1980). Managerial skill development. <u>Academy of Management Review</u>, <u>5</u>(3), 449-453.

APPENDIX A

Questionnaire For Assessing Effectiveness of
Handbook as a Training Tool

Please circle the response that most closely indicates how
you feel about each statement.

1. I am familiar with experience-based training and
   development programs.

Strongly   Disagree   Undecided   Agree   Strongly
disagree   agree

2. I have used experience-based training and
   development as a training tool.

Strongly   Disagree   Undecided   Agree   Strongly
disagree   agree

3. I feel the initiatives presented in the booklet are
   useful as a training tool.

Strongly   Disagree   Undecided   Agree   Strongly
disagree   agree

4. The booklet is easy to follow.

Strongly   Disagree   Undecided   Agree   Strongly
disagree   agree

5. I would use the booklet as part of my training and
   development program.

Strongly   Disagree   Undecided   Agree   Strongly

disagree   agree

6. I think the booklet needs more illustrations.

Strongly   Disagree   Undecided   Agree   Strongly
disagree   agree

7. I think the booklet needs more text.

Strongly   Disagree   Undecided   Agree   Strongly
disagree   agree

8. I would hire a professional facilitator to conduct
   the training.

Strongly   Disagree   Undecided   Agree   Strongly
disagree   agree

Other Comments:

APPENDIX B

List of Experts Who Were Asked
For Input For Pilot Handbook

1. Sun Microsystems, Mountain View, California -
   Director Organizational Development

2. Apple Computer, Cupertino, California - Director
   Organizational Development

3. Hewlett-Packard, Sunnyvale, California - Director
   Organizational Development

4. Levi-Strauss, San Francisco, California - Director
   Organizational Development

5. Richard J. Wagner, Associate Professor
   Associate Pofessor Management at the College of
   Business, University of Wisconsin,
   Whitewater, Wisconsin

6. John Cragun, Assistant Professor in the Department
   of Management, Utah State University, Salt Lake
   City, Utah

7. Paul F. Buller, Associate Professor, School of
   Business Administration, Gonzaga University,
   Spokane, Washington

8. Roland/Diamond Associates, Incorporated 1983, An
   organizational developemnt training firm. Keene,
   New Hampshire

9. Dr. Tom Smith, Director, Racoon Institute, An
   outdoor training firm, Cazenovia, Wisconsin

10. Alan Palz, Professor, School of Business,
    University of Southern California, Los
    Angeles, California

11. Timothy Baldwin, Assistant Professor of Management,
    School of Busisness, Indiana University,
    Indiannapolis, Indiana

APPENDIX C

<u>The Pilot Handbook</u>

Introduction

The information contained in this handbook is meant to serve as a working resource for anyone interested in organizational development. The initiatives and activities were developed to build and create the following skills: teamwork, communication, leadership, trust, and risk-taking. These skills are necessary for building a strong and effective organization. The initiatives are divided into three groups: warm-up activities, trust activities, and initiatives. For each activity or initiative the instructions are categorized as: object of initiative, group size, description, limitations, safety considerations, and equipment. Diagrams are given wherever possible.

There are also some words or phrases you may be unfamiliar with. To clarify these and make you feel comfortable with their usage, here are some short explanations/definitions:

Risk-taking: a measure of how risk-averse a person will tend to be in an organizational setting.

Problem solving: one's ability to consider all aspects of the problem and, to reach the best possible solution.

Teamwork: the ability of a person to effectively interact with peers and fellow workers to achieve a goal.

EBTD: stands for experience-based training and development. Generally, programs designed to meet a specific group of objectives, using outdoor experiences to foster teamwork, risk-taking, leadership, and communication skills.

Initiatives: activities that offer a series of clearly defined problems to solve, and which are designed so that a group must employ cooperation and some physical effort to gain a solution.

Situational Leadership: situations arising during initiative problems which call for a new leader to emerge for that particular situation or problem. This occurs most often when the worksite leader is handicapped during an initiative.

Alpha Male: the leader of the pack, so to speak. Usually the head of the group. This person is usually of male gender, emerges quickly as the one who speaks the most, and usually needs to be handicapped for group development to proceed.

Spotting: refers to the physical supporting of individuals within the group while they put themselves at risk.

Prior to attempting the initiatives, it is important to read the two sets of following guidelines.

Below are guidelines from *Voyageur Outward Bound Instructor Handbook* (1988), Ebbe (1985), and Nadler & Luckner (1992).

1. Try not to judge and assume you know why someone is acting a certain way. Being nonjudgmental and sensitive to someone else's point of view entails believing that all people are of equal worth, and all values and life styles are equal.

2. In your introduction let individuals know what to expect. Their preconceived expectations often create a barrier to learning from the unexpected.

3. Be clear about your role as a leader; to ensure safety, instruct, facilitate, observe, raise issues, and clarify. Simultaneously you need to be clear about what is not: to force people to change, to judge them, and to lay your own values on them.

4. Be clear about where a group can have input and make choices, and what you will not change about the course. When giving the group a choice, explain any parameters that they need to consider in their decision making, and be prepared to live with the choice they make.

5. Timing and pacing are essential. Reassess goals, individuals' needs, and group's needs regularly.

6. Help individuals turn negative feelings into positive learning experiences. Remember disequilibrium is the catalyst for growth.

7. You can only take others as far as you have gone. The more in touch you are with your own feelings, patterns of communication, and methods of resolving conflict, the easier it will be to facilitate learning in a group setting.

8. You cannot expect to relate to the life experiences and problems of all individuals with whom you work. Be honest. Do not pretend to have answers you do not have. Ask good questions. Often group members can use each other as resources, and usually people can find their own answers, especially when encouraged to listen to their own inner wisdom. We can point out behavior and offer options as ways to handle a situation, but individuals need to make their own decisions.

9. When honesty and respect are demonstrated and trust ensues, honest confrontation and open questioning are usually met with appreciation. Realize that for many people it takes a lot of courage to let down defenses and engage in open, honest communication. We need to respect people for who they are. Some will disclose and share deeply; with others what appears to be superficial and nonrisky to us may be a large emotional risk for them.

10. The more you talk, the more silence from the group members will probably follow. If you are able to create an environment that is safe and on task, people will fill it with their thoughts and feelings.

11. Setting up a one-on-one norm (you talking to one member at a time) can stifle group interaction.

12. If an activity or method does not work, keep on moving and try something else.

13. Try not to over focus or get into problems which cannot be solved.

14. If an individual is opening up and really helping the group, do not let the person dry up. Open up the group to all, widen the focus, and tie each person's issues into the others in the group. For example, you might say, "Greg, we all know how Judy deals with her anger; how do you deal with yours?"

15. Look for common issues and themes in the group to link them to each other. Your job is similar to a weaver or tailor by connecting issues and people with each other and then continually drawing them in closer.

16. Ask members in the group what it is they want right now. Once it is made explicit, have the member ask others in the group directly for it: "Steve, can you support me when I'm scared?" "Jill, will you support me?" The more members can ask each other directly and assertively about

what they want, the easier it is to transfer this to others outside the group. The group serves as a microcosm of the outside world.

17. While listening, look around to see how others are behaving and reacting.

18. If members begin to cry, you may still ask them questions or ask them to stop and pull themselves together.

19. Most people may not be ready to deal with an issue the first time it is brought up. If it is important, it will come up again.

20. When there are intensity and strong emotions expressed at a group session, the next group session is apt to be more superficial.

21. The things that you chose not to say are many times the most accurate and effective. Learn to trust yourself and your intuition.

Besides the previous guidelines, it is important to set up some ground rules for your group. Here are some suggestions taken from *Processing the Adventure Experience* (1992).

1. The group should sit in a circle where everyone can see each other.

2. Ask participants not to lie down. Try to keep the energy of the group within the circle.

3. Introduce the group process. Some specifics you may want to include are (a) speak honestly and openly with others, (b) this is a safe environment to explore feelings and learning from the experience, and (c) listen and receive constructive comments from others.

4. What is spoken in the group will remain confidential among group members, unless the individuals give their permission to share their situation and feelings with others outside the group.

5. There is to be no physical violence in the group.

6. One person speaks at a time without interrupting the others. Each person should listen to and try to tune into what others are saying.

7. Everyone in the group belongs in the group. Only the leader can chug this rule. If the group is unhappy with one person, this does not change the individual's membership in the group. The unhappiness is what needs to be worked through.

8. Everyone is ultimately responsible for his or her own behavior. No one should be forced into anything. Sometimes members need encouragement to try new things, but whenever possible they should have the right to say no or pass.

9. What is true for individuals must be determined for themselves. People may have different perceptions about an

event they have shared with others. As a result, people's
emotions belong to them and should be considered true for
that person.

Warmup Activities

It is best to start with some physical warmup
exercises. These may take any form. This segment should last
about 10 to 15 minutes. This allows the participants to
relax and feel more at ease with their surroundings as well
as warming up the muscle groups. These should be casual and
noncompetitive.

After the physical warmups, some ice-breaking
activities are appropriate. These are simple activities
that pave the way for the rest of the program. They should
be presented in a fun atmosphere.

Name your team

Object: Each team must name its group and give the group a special cheer to yell each time encouragement is needed.

Size: Any

Limitations: None

Safety considerations: None

Equipment: Sometimes colored T-shirts or bandannas are used so the facilitator and group members can quickly distinguish each other.

Pass-the-clap

Object: To pass a hand clap around the circle as fast as possible.

Size: The larger the better.

Description: The group is in a circle. Each person extends his or her hands to the side and every other person should have palms up so there is alternating palms up, palms down, etc. One person starts by clapping a neighbor's hand and it goes all the way around the group until it comes back to the original person. It is fun to alternate directions.

Limitations: None

Safety considerations: None

Equipment: Stop watch.

Now that there is a feeling of relaxation, fun, and openness within the group, the more challenging initiatives may be undertaken.

Cave run

Object: To run down the middle of the group while blindfolded. This is a good initiative to develop trust.

Size: This works best with a large group of at least 20 people.

Description: All members of the group stand in two parallel lines facing each other and forming a long cave or tube. The lines should be about four feet apart. Each group member takes a turn running down the center of the lines while blindfolded. The members forming the two lines gently guide the member along. This initiative asks the individual to trust the sense of sight to the group.

Limitations: None

Safety Considerations: Make sure all the members of the group forming the lines are guiding the runner aloud and that there are no obstacles on the ground.

Equipment: Blindfolds.

All trust initiatives ask the participants to give up some control. This may seem trivial, but it builds a solid foundation of trust for the more challenging obstacles ahead. Allowing someone else to catch you when you fall or be your eyes, etc. is a challenging task for most individuals. This is especially true for those individuals who are or who like to always be in control.

Initiatives

These initiatives may be used alone or as a successive combination within a large challenge course.

The Mississippi

Object: The group must retrieve a pail from the other side of an imaginary river bank.

Size: Any size will do.

Description: Give the group the equipment and explain the objective and limitations. Let the group solve this with little intervention.

Limitations: (1) The participants may use only the given props and themselves; (2) if a participant touches the water, he or she must either begin again or loose the use of the body part that touched the water. This initiative requires some time and planning on the team's part.

Safety Considerations: Remind the group to spot each other if needs be.

Equipment: For this initiative you will need a pole at least 2 inches in diameter, a hardwood plank that is at least 6 inches wide and 2 inches thick, a length of multiline rope, and a stick.

Poisonous jelly pit

Object: To transport a pail containing poisonous liquid and your group across a specified area, "The poisonous Jelly Pit," using a rope.

Size: Any size group.

Description: The specified area must be marked at both boundaries. The rope is suspended in the middle. The area markers may be made of bamboo poles about 10 feet in length, which each lie on 2 4x4's two feet in height. The group must swing over this area to get to the other side.

Limitations: (1) The swinging rope must be obtained initially without stepping in the open area between two markers. The group may use only themselves and their clothing to gain the rope. (2) The participants must swing over the area crossing both markers without knocking either off. If they are knocked off, the entire group must start over. (3) No knots may be tied in the rope. (4) The liquid must be transported in such a way that none is spilled. If any amount of spillage occurs, the entire group must start over. The pail should be marked at 7/8 full. (5) If any participant touches the ground between the markers, he or she must attempt to cross again.

Safety Considerations: Make sure that spotters are available and aware if needed.

Equipment: 5/8" diameter multiline rope, 2 4x4's about 2feet in length, two bamboo poles about 10 feet in length, and trees.

Trail-full-O'-acronyms

Object: To decipher a series of clues and spell out a final phrase.

Size: Any size will do. This is a great initiative for groups of 50+ provided they are divided into smaller groups.

Description: This takes some planning on the part of the facilitator. This is a type of word game that has two phases. It takes place on a trail or on a path of any kind. If this is not available, you can make up a route. The group goes out on the trail with paper, a clipboard, and pencils. Along this trail clues are posted on 3"x5" cards. The group writes down the clue, or if they figure it out, the answer. The answers to all the clues are letters. After they have completed the trail and found all the clues, they must unscramble all the letters to spell out a phrase. It is the responsibility of the facilitator to create and post the clues. The final answers should be a phrase that has something to do with the group's goals. Here is an example: The final answer is the phrase "Let's work as one." There are 13 letters in the phrase which means that the facilitator must create 13 clues-- one for each of the letters. For instance, for the letter *E*, the clue might be written on the 3"x5" card as follows: "The first letter of an animal with a trunk." For the letter *T* the clue might be written as follows: "A small golf accessory." Once all

these clues have been deciphered, the group must next
unscramble the letters to spell out the phrase.

Limitations: (1) If more than one group is involved,
each group must be sent off in 2-minute intervals. (2) The
group may not remove the cards. They will be disqualified
if they do. (3) The group must stay together as a group the
whole time.

It is important for the facilitator to create clues
that reflect the intellectual level of the group.

Safety considerations: Pick a trail or a path that is
not too hazardous.

Equipment: Pencils, paper, a clipboard, a stopwatch,
and trails.

Human-eating worm swamp
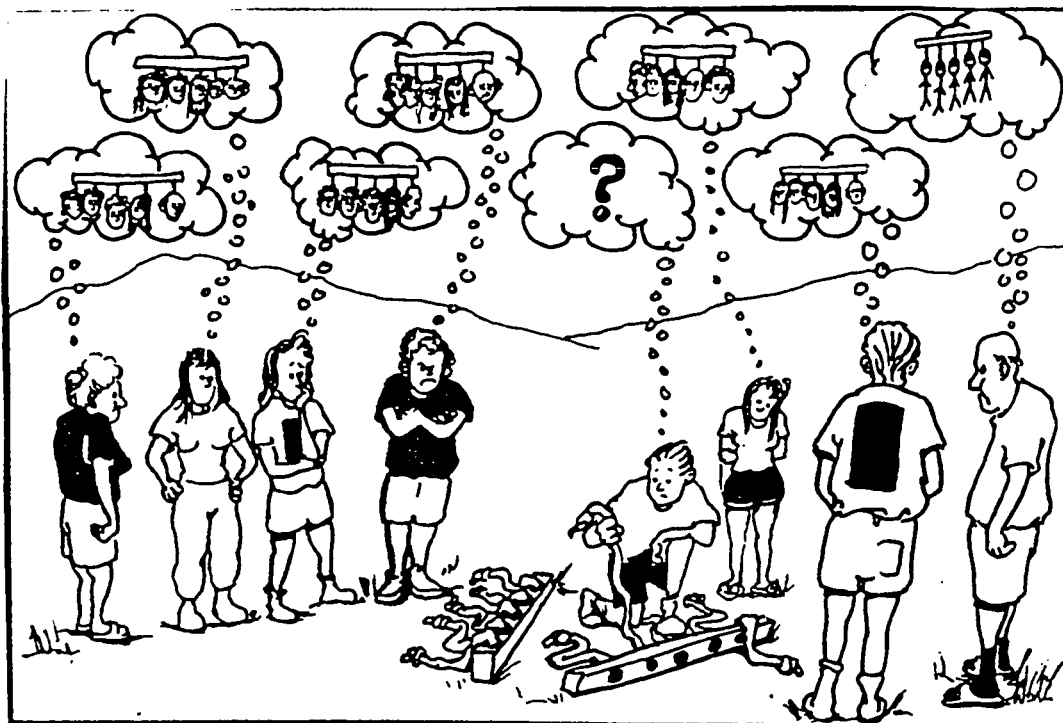
Object: To transport the group across a swamp of human-eating worms.

Size: Between 10 and 20 people.

Description: This initiative works best on dirt or grass. Two 4x4's, about 8 feet in length, with inset holes drilled in them where 5 foot ropes are knotted, are used to cross the swamp. Designate the swamp with turf chalk. When presenting this initiative to the group, do not place the boards parallel to each other, as this will give a clue as to how they are used. Eventually, the group figures out that they place each of their feet on the boards between the ropes and hold the ends of the ropes in their hands doing a synchronized walking motion.

Limitations: (1) If anyone touches the swamp or falls in he or she is either eaten or becomes mute and blind. (2) the worms are also very sensitive to human voices, so if any one person talks excessively, he or she will become mute or blind.

Safety Considerations: None

Equipment: Two 4x4's 8 feet in length depending on group size, polypropylene rope, and blindfolds. You may have to enlist a carpenter to help with construction.

The Fisherman's Net

Object: To get the group through the net without touching any of the net material. This initiative works on teamwork, planning, organization and group needs vs. individual needs.

Description: Between two poles or trees that extends from the ground to about 6 feet in height (See diagram).

Limitations: (1) If a person touches any part of the net during passage, he or she must return and start again. (2) If a helper(s) touches the web for any reason, he or she

must also return and start again. (3) Once an opening is
used, it cannot be used again.

Safety Considerations: The group must pay careful
attention to lifting and spotting members.

Equipment: Nylon cording material and trees.

Hansel and Gretel

Object: While blindfolded, to find one's way out of a
maze. This may be accomplished individually or with someone
else.

Description: The maze is constructed of rope held up by
stakes or trees. It may be constructed in any free form
shape.

Limitations: (1) Each person must maintain contact with
a rope at all times. (2) Maneuvering under a rope is not

allowed unless the rope is overhead. (3) Each participant must move slowly and not lead with his or her head. (4) As each person finds the exit, the instructor taps him or her on the shoulder, he or she removes the blindfold, and quietly watches the remainder of the group. (5) The facilitator may make up rules about reentering the maze to help someone (remaining blindfolded).

Safety Considerations: Make sure there are no sharp objects sticking into the path of the maze and clear the ground of all items that may cause tripping.

Equipment: Smooth rope, stakes or poles, and blindfolds.

The next phase in any experiential course would be to process the initiative. This should be done after each initiative. Immediate processing is the most effective because the group is able to recall everything easily. Along with the following questions, remember to follow the parameters laid out at the beginning of the booklet.

Processing questions

1. Was this initiative easy or difficult? Why?

2. Did you like or dislike this initiative? Why?

3. Do you feel the initiative would be easier to solve with more or less information?

4. Whom did most of the decision making?

5. Who was the leader?

6. Whom did you listen to the most?

7. Who did most of the talking?

8. Did making _____ blind/mute change group decisions making or interaction?

9. How did gender stereotyping, based on strength and physical size, come into play?

10. Was it more important to focus on the task or the individual?

11. What did you learn?

12. Do you find any similarities between this problem and problems you might face at work?

APPENDIX D

<u>Pilot Survey Data</u>

When asked about their familiarity of experience-based
training and development (Question 1), 67% strongly agreed
and 33% agreed. Next, 83% strongly agreed and 17% agreed
that they have used EBTD as a training tool (Question 2).
When asked about the initiatives' usefulness as a training
tool (question 3), (a) 33% strongly agreed, (b) 17% agreed,
(c) 33% were undecided, and (d) 17% strongly disagreed.
When asked if the handbook was easy to follow (Question 4)
(a) 33% strongly agreed, (b) 33% agreed, (c) 17% were
undecided, and (d) 17% strongly disagreed. When asked about
using the handbook as part of their training program
(Question 5), (a) 17% strongly agreed, (b) 33% agreed, (c)
17% disagreed, and (d) 33% strongly disagreed. When asked
if the handbook needs more illustrations (Question 6), (a)
33% undecided, (b) 33% disagreed, and (c) 33% strongly
disagreed. When asked if the handbook needs more text
(Question 7), (a) 33% strongly agreed, (b) 17% agreed, (c)
17% undecided, (d) 17% disagreed, and (e) 17% strongly
disagreed. When asked if they would hire a professional
facilitator to conduct the training (Question 8), (a) 50%
strongly agreed, (b) 33% undecided, (c) 17% strongly
disagreed.

Final Handbook Survey Data

When asked about their familiarity with EBTD (Question 1),
(a) 5% strongly disagreed, (b) 35% undecided, (c) 45%
agreed, and (d) 15% strongly agreed. When asked whether
they have used EBTD as a training tool (Question 2), (a) 71%
strongly disagreed, (b) 18% agreed and (c) 11% strongly
agreed. When asked if they felt the initiatives presented
in the handbook were useful as a training tool (Question 3),
(a) 59% undecided, (b) 24% agreed, and (c) 17% strongly
agreed. Regarding how easy the handbook was to follow
(Question 4), (a) 88% agreed and (b) 12% strongly agreed.
When asked if they would use the handbook as part of a
training program (Question 5), (a) 24% disagreed, (b) 29%
undecided, and (c) 47% agreed. When asked if the handbook
needs more illustrations (Question 6), (a) 53% disagreed and
(b) 47% agreed. When asked if the handbook needs more text
(Question 7), (a) 12% disagreed, (b) 29% were undecided, and
(c) 59% agreed. When asked if they would hire a
professional facilitator to conduct the training (Question
8), (a) 29% were undecided, (b) 47% agreed, and (c) 24%
strongly agreed.

A

SOURCEBOOK

OF

EXPERIENCE-BASED TRAINING

AND DEVELOPMENT

By Elizabeth Vitanza
Illustrations by Dan Chapman

Foreword

This handbook is meant to serve two purposes. First, as an introductory training guide for individuals wishing to develop skills as a facilitator of outdoor training programs. Second, for those trainers or professionals familiar with Experience-Based Training and Development (EBTD), this handbook may serve as a guide in choosing an appropriate facilitator and/or refining an existing program.

It is most critical that any reader or user of this handbook be aware of two important points:

1. It is recommended that a professional facilitator be used at all times. This is especially true if the reader and/or user of this handbook is new to this type of training. This will not only enhance the effectiveness of the program, but also ensure that all safety precautions, both physical and psychological, are taken care of.

2. If no facilitator is used, then the novice facilitator must realize they run physical and psychological risks to the participants.

Introduction

The activities and information contained in this handbook are meant to serve as a working resource for anyone interested in organizational development. The initiatives and activities were developed to build and enhance the following skills: teamwork, communication, communication, trust and, risk-taking. These skills, which are essential to all types of organizations, are achieved through the use of "initiatives." Initiatives, which are part of a larger family of training known as "Experience-based Training and Development" or EBTD, are activities that involve a problem to solve. The solution to the problem solving is usually brought about by both physical exertion and communication. EBTD, as a category, is training that combines the cognitive, affective, and behavioral aspects of a person. As trainers or persons involved in organizational development, this handbook will serve you in two ways: as a tool for training, it gives information on how to conduct the training yourself, and it may serve as a guide for choosing a program or facilitator to do the training for you.

This handbook is divided into these areas: Introduction, How Does EBTD Work, Program Planning, Group Guidelines, Group Ground Rules, Getting Started, Initiatives, and Processing. I hope you will find this handbook useful.

How Does EBTD Work?

EBTD is based on two simple theories. The first is that we learn by "doing," not by sitting in a classroom taking notes. In order for the learning to occur, the experience must be rich with feedback, participative, interactive, and have clear goals, while adapting constantly to the situation. This is most apparent in any kind of sport. Someone interested in learning to swim would do so through practicing the strokes in the water, not by reading books, listening to a lecture or, taking notes. These non-participative avenues of learning may enhance the learning process, but they are inferior.

The second theory is that change or learning can only occur if there is a catalyst. Studies have shown that life changes usually occur when something monumental happens to a person (i.e. divorce, death, etc.). Placing someone in a situation where the surroundings are unfamiliar and there is a sense of perceived fear will cause them to be more open to the possibility of growth within the organizational setting. This unfamiliarity with surroundings, a new leader, perceived fear, etc. throws the person off balance and, consequently, the usual responses to situations change. This unbalance, while frightening at times, is important for maximum growth/learning/change.

Program Planning

As with most training programs, in-depth planning is essential. Planning will help you ask and answer questions. The following five points will serve as a checklist for help with either creating your own program or with selecting a qualified EBTD facilitator.

1. What are our goals and objectives?

It is imperative before any training begins to have clear and definite goals and/or objectives. First, if your goals are unclear, how will you know if your needs have been met? It is helpful to make a list of very specific objectives so that you can measure the program's effectiveness. EBTD initiatives lack content and concentrate on process. (Of course, if your goal is to play word games while running through the woods, then these initiatives are full of content!) Knowing your group's goals or objectives will allow you to focus not only on the most effective initiatives, but also on specific aspects of each initiative during the processing period.

2. Why use EBTD?

Although your reason for using EBTD may be because the CEO wants to "do teamwork activities," you may want to know what EBTD purports to provide that conventional training or education seemingly lacks. First, almost all EBTD activities take place in an outdoor setting where there is close physical and

emotional contact. This is especially true if the group sleeps, eats, and thinks together for several days. This intimacy and bonding is what tends to hold a team together. Secondly, studies have shown how emotional events become a catalyst for change. When profound emotional experiences enter our lives they open the door for change. The same seems to be true for EBTD. Another reason EBTD may be successful is because it is filled with metaphors. The same roadblocks such as lack of communication or walls of defense that people/teams have while in an organizational setting will also occur outdoors. These roadblocks can even be enhanced. However, while the roadblocks may not be apparent to the team while they are in their everyday setting, they will surface during the activities. Even more importantly, what to do to correct the problems will reveal itself.

3. Finding the right facilitator.

This point cannot be stressed enough. Finding the right facilitator or group to conduct your training or to train you will probably be the most important decision you will make. The competency and attitude of the facilitator can make or break your program. First, you must feel comfortable and not feel intimidated by the facilitator. Ask the facilitator to provide a list of references of past clients. Contact these references and ask them specific questions. These may include the following:

1. What was your groups specific goals?

2. Were they met?

3. Was the facilitator flexible?

4. How did he/she react to conflict?

Make sure the facilitator or facilitating group has at the minimum advanced degrees in psychology, human resources, or organizational development. Lastly, make sure you are fully aware of all costs and have a signed contract with the facilitator. Costs vary from $100 to $1,200 per person per day. Generally, the ground-based initiatives, which are similar to the ones in this handbook, cost between $100 and $300 per person per day.

4. Your role.

Whether you are the CEO, the Director of Human Resources, an administrative assistant, a teacher, or a manager, you are the one who is in charge of the program. Thus, it is important that you define your role within the program. Both the facilitator and the group should be clear about your role. First, make sure that you meet several times with the facilitator. A face-to-face meeting is the most beneficial. Make sure that the facilitator's program is workable and compatible with your group. You may want a less (or more) physical program. You may need a simpler, more straightforward approach. Make sure you communicate everything to the facilitator. Second, it is generally not a good idea to be a participant. You should remain as an observer. It is too hard to jump in and out of roles if you act both as a

participant and an observer and, the team will not be as effective. Third, and most importantly, it is your responsibility to make sure all this education is transferred to the workplace.

Some Guidelines

Prior to attempting the initiatives, it is important to read the following guidelines. While these guidelines are written for the facilitator, they are important for you to know whether or not you are the facilitator. These guidelines are taken from the following sources: *Voyageur Outward Bound Instructor Handbook* (1988) and *Processing the Adventure Experience* (1992).

1. Try not to judge and assume you know why someone is acting a certain way. Being non-judgmental and sensitive to someone else's point of view entails believing that all people are of equal worth, and all values and life styles are equal.

2. In your introduction let individuals know what to expect. Their preconceived expectations often create a barrier to learning fro the unexpected.

3. Be clear about your role as a leader: to ensure safety, instruct, facilitate, observe, raise issues, and clarify. Simultaneously, you need to be clear about what your role as a leader is not: to force people to change, to judge them, and to lay your own values on them.

4. Be clear about where a group can have input and make choices, and what you will not change about the course. When giving the group a choice, explain any parameters they need to

consider in their decision making and be prepared with the choice they make.

5. Timing and pacing are essential. Reassess goals, individuals' needs, and group needs regularly.

6. Help individuals turn negative feelings into positive learning experiences. Remember: disequilibrium is the catalyst for growth.

7. You can only take others as far as you have gone. The more in touch you are with your own feelings, patterns of communication, and methods of resolving conflict, the easier it will be to facilitate learning in a group setting.

8. You cannot expect to relate to the life experiences and problems of all individuals with whom you work. Be honest. Do not pretend you have answers you do not have. Ask good questions. Often group members can use each other as resources, and usually people can find their own answers, especially when encouraged to listen to their own inner wisdom. We can point out behavior and offer options as ways to handle a situation, but individuals need to make their own decisions.

9. When honesty and respect are demonstrated and trust ensues, honest confrontation and open questioning are usually met with appreciation. Realize that for many people it takes a lot of courage to let down defenses and engage in honest open communication. We need to respect people for who they are.

Some will disclose and share deeply; with others, what appears to be superficial and non-risky to us, may be a large emotional risk for them.

10. The more you or the facilitator talks, the more silence from group members will probably follow. If you are able to create an environment that is safe and on task, people will fill the environment with their thoughts and feelings.

11. Setting up a one-on-one norm can stifle group interaction.

12. If an activity or a method does not work, keep on moving and try something else.

13. Try not to over focus or get into problems that cannot be solved.

14. If an individual is opening up and really helping the group, do not let the person dry up. Open up the group and widen the focus.

15. Look for common issues and themes in the group to link the participants to each other. Your job is similar to a weaver or a tailor by connecting issues and people with each other and then continually drawing them in closer.

16. Ask members in the group what it is they want right now. Once what they want is made explicit, have the member ask others in the group directly for it: "Steve, can you support me when I'm scared?" "Jill, will you support me?" The more members

can ask each other directly and assertively about what they want, the easier it is to transfer this to others outside the group. The group serves as a microcosm of the outside world.

17. While listening, look around to see how others are behaving and reacting.

18. If members begin to cry, you may still ask them questions or ask them to stop and pull themselves together.

19. Most people may not be ready to deal with an issue the first time it is brought up. If the issue is important, it will come up again.

20. When intensity and strong emotions are expressed at a group session, the next group session is apt to be more superficial.

21. The things that you choose not to say are many times the most accurate and effective. Learn to trust yourself and your intuition.

Group Ground Rules

Besides the previous guidelines, it is important to set some ground rules for your group. Here are some suggestions taken from *Processing the Adventure Experience* (1992).

1. Have the group sit in a circle where everyone can see each other.

2. Ask participants not to lie down. Try to keep the energy of the group within the circle.

3. Introduce the group process. Some specifics that you may want to include are (a) speaking honestly and openly with others, (b) knowing this is a safe environment to explore feelings and learn from the experience, and (c) listening and receiving constructive comments from others.

4. What is spoken in the group will remain confidential among group members, unless the individuals give their permission to share their situation and feelings with others outside the group.

5. There is to be no physical violence in the group.

6. One person speaks at a time without interrupting the others. Each person should listen to and try to tune into what others are saying.

7. Everyone in the group belongs in the group. Only the leader can change this rule. If the group is unhappy with one person, this does not change the individual's membership in the group. The unhappiness is what needs to be worked through.

8. Everyone is ultimately responsible for his or her own behavior. No one should be forced into anything. Sometimes members need encouragement to try new things, but whenever possible they should have the right to say no or pass.

9. What is true for individuals must be determined for themselves. People may have different perceptions about an event that they have shared with others. As a result, people's emotions belong to themselves and should be considered true for that person.

Getting Started

All the initiatives presented in this handbook were adapted from *Cowstails and Cobras* by Karl Rohnke, except "Trail Full O' Acronyms", which was created by the author. For each activity or initiative, the instructions are categorized as: object of initiative, group size, description, limitations, safety considerations, equipment, and "why". There are also some words or phrases that you may be unfamiliar with. To clarify these and make you feel comfortable with their usage, here are some short explanations/definitions:

1. **Risk-taking-** A measure of how risk averse a person will tend to be in an organizational setting.

2. **Problem solving-** One's ability to consider all aspects of the problem, and to reach the best possible solution.

3. **Teamwork-** The ability of a person to effectively interact with peers and fellow workers to achieve a goal.

4. **EBTD-** EBTD stands for Experience-Based Training and Development. Generally, EBTD programs are designed to meet a specific group of objectives, using outdoor experiences to foster teamwork, risk-taking, leadership, and communication skills.

5. **Initiatives-** Activities that offer a series of clearly defined problems to solve and which are designed so that a group must employ cooperation and some physical effort to gain a solution.

6. **Situational leadership-** Situations arising during initiative problems which call for a new leader to emerge for that particular situation or problem. This occurs most often when the worksite leader is handicapped during an initiative.

7. **Alpha Male-** The leader of the pack, so to speak. Usually the head of the group. This person is usually of male gender, emerges quickly as the one who speaks the most, and usually needs to be handicapped for group development to proceed.

8. **Spotting-** Refers to the physical supporting of individuals within the group while they put themselves at risk.

9. **Handicapping-** Refers to making one or more members of the group blind and/or mute. Used when one or more individuals are dominating the group process. Also good to bring out situational leaders.

It is best to start with some physical warmup exercises. These may take any form. These exercises allow the participants to relax and feel more at ease with their surroundings as well as warming up the major muscle groups. The exercises should be casual and noncompetitive.

After the physical warmups, some ice breaking activities are appropriate. These are simple activities that pave the way for the rest. They are Name Your Team and Pass the Clap. While they may seem rather juvenile, they are an important first step to the group decision making problem. They should be presented in a fun atmosphere. After the ice breakers, the initiatives may be tackled.

Name your team

"Name Your Team" is always a good way to start off any program. Colored T-shirts, bandannas, etc. always help too.

Object: Each team must name its group and give the group a special cheer to yell each time encouragement is needed.

Size: Any.

Limitations: None.

Safety considerations: None.

Equipment: Sometimes colored T-shirts or bandannas are used so that the facilitator and the group members can quickly distinguish each other.

Why?: Letting the group choose its name gives the participants a sense of identity which can enhance group cohesiveness.

Pass-the-clap

Object: To pass a hand clap around the circle as fast as possible.

Size: The larger the better.

Description: The group is in a circle. Each person extends his or her hands to the side and every other person should have palms up so there are alternating palms up, palms down, etc. One person starts by clapping a neighbor's hand and it goes all the way around the group until it comes back to the original person. It is fun to alternate directions.

Limitations: None.

Safety considerations: None.

Equipment: Stopwatch.

Why?: The name always gets a good chuckle! It is a simple way to start the team working together and it involves very little perceived risk.

Cave run

Object: To run down the middle of the group while blindfolded.

Size: This works best with a large group of 20or more people.

Description: All members of the group stand in two parallel lines facing each other and forming a long cave or tube. The lines should be about four feet apart. Each group member takes a turn running down the center of the lines while blindfolded. The members forming the two lines gently guide the member along. This initiative asks the individual to trust the sense of sight to the group.

Limitations: None.

Safety considerations: Make sure all the members of the group forming the lines are guiding the runner aloud and that there are no obstacles on the ground.

Equipment: Blindfolds.

Why?: This is a simple exercise in trust. All trust initiatives ask the participants to give up some control. This may seem trivial, but it builds a solid foundation of trust for the more challenging obstacles ahead. Allowing someone else to catch you when you fall or be your eyes, etc. is a challenging task for most individuals. This is especially true for those individuals who are or who like to always be in control.

The Mississippi

Object: The group must retrieve a pail from the other side of an imaginary river bank.

Size: Any size will do.

Description: Give the group the equipment and explain the objective and the limitations. Let the group solve this with little intervention.

Limitations: (a) The participants may use only the given props and themselves and (b) if a participant touches the water, he or she must either begin again or lose the use of the body part that touched the water. This initiative requires some time and planning on the team's part.

Safety considerations: Remind the group to spot each other if necessary.

Equipment: For this initiative you will need a pole at least two inches in diameter, a hardwood plank that is at least six inches wide and two inches thick, a length of multi-line rope, and a stick.

Why?: This initiative is great because it involves a lot of problem solving, communication, and teamwork. It may seem impossible to the team at first, but eventually the participants will solve the problem. Remember to use your handicaps if necessary.

Poisonous jelly pit

Object: To transport a pail containing poisonous liquid and your group across a specified area, "The Poisonous Jelly Pit", using a rope.

Size: Any size group.

Description: The specified area must be marked at both boundaries. The rope is suspended in the middle. The area markers may be made of bamboo poles about 10 feet in length, which each lie on two 4x4's two feet in height. The group must swing over this area to get to the other side.

Limitations: (a) The swinging rope must be obtained initially without stepping in the open area between two markers. The group may use only themselves and their clothing to gain the rope; (b) the participants must swing over the area crossing both markers without knocking either off. If they are knocked off, the entire group must start over; (c) no knots may be tied in the rope; (d) the liquid must be transported in such a way that none is spilled. If any amount of spillage occurs, the entire group must start over. The pail should be marked at 7/8 full; (e) If any participant touches the ground between the markers, he or she must attempt to cross again.

Safety considerations: Make sure that spotters are available and aware if needed.

Equipment: 5/8" diameter multiline rope, two 4x4's about 2feet in length, two bamboo poles about 10 feet in length, trees.

Why?: Another multifaceted initiative which works on many skills. It is up to you to be very strict with the rules.

Trail-full-O'-acronyms

Object: To decipher a series of clues and spell out a final phrase.

Size: Any size will do. This is a great initiative for groups of 50 or more, provided the participants are divided into smaller groups.

Description: This takes some planning on the part of the facilitator. This is a type of word game that has two phases. It takes place on a trail or a path of any kind. If neither is available, you can make a route up. The group goes out on the trail with paper, clipboard, and pencils. Along this trail clues are posted on 3"x5" cards. The group writes down the clue or, if they figure it out, the answer. The answers to all the clues are letters. After they have completed the trail and found all the clues they must unscramble all the letters to spell out a phrase. It is the responsibility of the facilitator to create and to post the clues. The final answers should be a phrase that has something to do with the group's goals. Here is an example: The final answer is the phrase "let's work as one." There are 13 letters in the phrase which means that the facilitator must create 13 clues for each of the letters. For instance for the letter E, the clue might be written on the 3"x5" card as follows: "The first letter of an animal with a trunk." For the letter T, the clue might be written as follows: "A small golf accessory." Once all these clues have been deciphered,

the group must next unscramble the letters to spell out the phrase.

Limitations: (a) If more than one group is involved, each group must be sent off in two-minute intervals; (b) the group may not remove the cards; they will be disqualified if they do; and (c) the group must stay together as a group the whole time.

It is important for the facilitator to create clues that reflect the intellectual level of the group.

Safety considerations: Pick a trail or a path that is not too hazardous.

Equipment: Pencils, paper, clipboard, stopwatch, trails.

Why?: This is a great initiative. Problemsolving and communication are at work. this initiative does not involve too much physical risk unless it is done in the Himalayas. The popularity of word games and puzzles makes this initiative a favorite.

Human-eating Worm Swamp
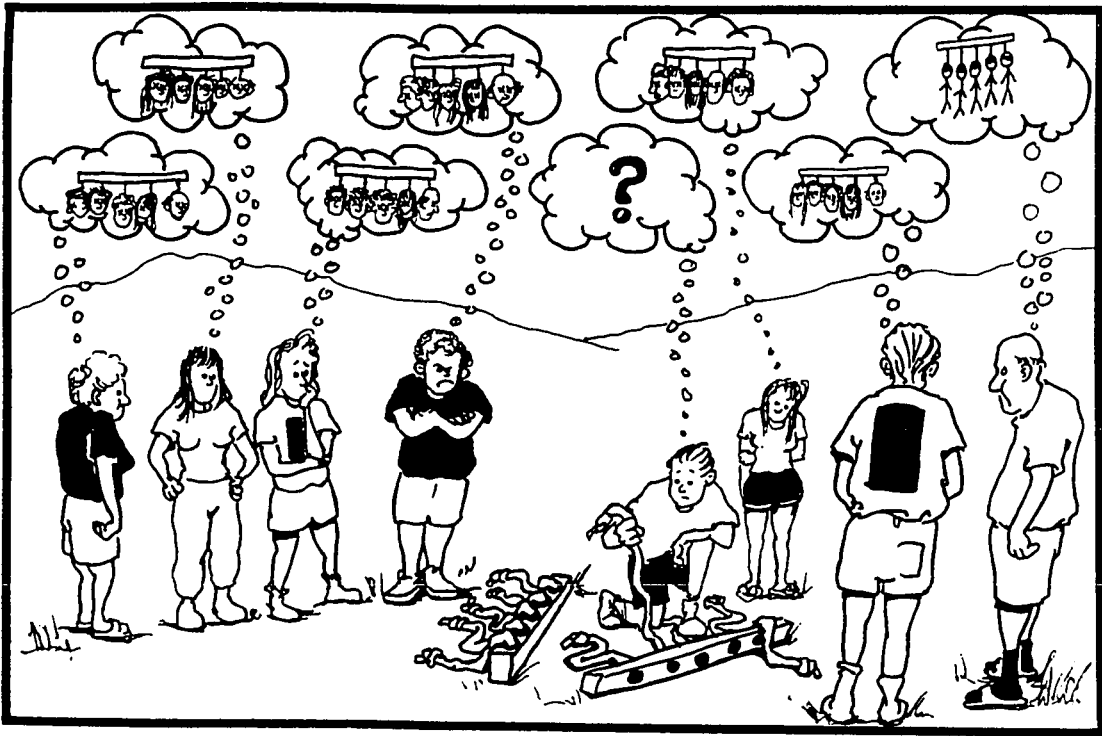
Object: To transport the group across a swamp of human-eating worms.

Size: Between 10 and 20 participants.

Description: This initiative works best on dirt or on grass. Two 4x4's, about 8 feet in length, with inset holes drilled in them where 5-foot ropes are knotted, are used to cross the swamp. Designate the swamp with turf chalk. When presenting this initiative to the group, do not place the boards parallel to each other, as this will give a clue as to how they are used. Eventually, the group figures out that they place each of their feet on the boards between the ropes and hold the ends of the ropes in their hands performing a synchronized walking motion.

Limitations: (a) If anyone touches the swamp or falls in, he or she is either eaten or he or she becomes mute and blind; (b) the worms are also very sensitive to human voices, so if any one person talks excessively, he or she will become mute or blind.

Safety considerations: None.

Equipment: Two 4x4's 8feet In length depending on group size, polypropylene rope, blindfolds. You may have to enlist a carpenter to help with construction.

Why? This initiative is great for communication, especially be because of the synchronized movements. Make sure you employ some handicaps early on.

The Fisherman's Net

Object: To get the group through the net without touching any of the net material. This initiative works on teamwork, planning, organization, and group needs vs. individual needs.

Description: A net that is placed between two poles or trees extends from the ground to about 6 feet in height.

Limitations: (a) If a person touches any part of the net during passage, he or she must return and start again; (b) if a helper(s) touches the web for any reason, he or she must also return and start again; and (c) once an opening is used, it cannot be used again.

Safety considerations: The group must pay careful attention to lifting and spotting members.

Equipment: Nylon cording material and trees or poles.

Why?: This initiative works on all skills. It can take a long time especially if the net contains smaller holes. Issues of stereotyping sexes always comes up.

Hansel and Gretel

Object: While blindfolded, to find one's way out of a maze. This may be accomplished individually or with someone else.

Description: The maze is constructed of rope held up by stakes or by trees. It may be constructed in any free form shape.

Limitations: (a) Each person must maintain contact with a rope at all times; (b) maneuvering under a rope is not allowed unless the rope is overhead; (c) each participant must move slowly and not lead with his or her head; (d) as each person finds the exit, the instructor taps him or her on the shoulder, he or she removes the blindfold, and quietly watches the remainder of the group; and (e) the facilitator may make up rules about reentering the maze to help someone (remaining blindfolded).

Safety considerations: Make sure there are no sharp object sticking into the path of the maze and clear the ground of all items that may cause tripping.

Equipment: Smooth rope, stakes or poles, and blindfolds.

Why?: This can be a very challenging initiative. It works on all skills and can be made very long.

Processing

The next phase in any experiential course would be to process the initiative. The processing is the most important aspect of any program. As mentioned earlier, the initiatives are void of any real content. Thus, the processing phase gives the initiatives their meaning and content. The processing should be done immediately after each initiative. Immediate processing is the most effective because the group is able to recall everything easily. Along with the following questions, remember to follow the parameters laid out at the beginning of the booklet. You may also want to develop your own questions based on your goals.

Sample Processing questions

     1. Was this initiative easy or difficult? Why?

     2. Did you like or dislike this initiative? Why?

     3. Do you feel the initiative would be easier to solve with more or less information?

     4. Whom did most of the decision making?

     5. Who was the leader?

     6. Whom did you listen to the most?

     7. Who did most of the talking?

     8. Did making _____ blind/mute change group decision making or interaction?

9. How did gender stereotyping, based on strength and physical size, come into play?

10. Was it more important to focus on the task or on the individual?

11. What did you learn?

12. Do you find any similarities between this problem and problems you might face at work? What?

13. Can the challenges you face at work be solved using some of the skills you have learned? How?

14. What aspects of the initiative would you change to make the situation better? Why?

15. Are there situations you may experience at work that you can change now?

P.S.

The tone you set for these initiatives will determine the group's responsiveness. Under the right conditions, these initiatives can be very useful for change within an organization. On the other hand, if they do not have the right forethought and leadership, they are ineffective and the group may make a mockery of them. The initiatives have no context and meaning unto themselves, so the meaning is your responsibility. However, the initiatives, taken at face value, are a lot of fun. There is no reason why they cannot be used just for fun and games. Most professional EBTD organizations and individuals wince at the idea of these initiatives being used for enjoyment. The analogies are these: education is serious business, but we read and learn for fun and pleasure, too. Many things that are taught in the military are serious, but they are mimicked for fun, too.

Why can't these initiatives be used for enjoyment? They are great for youth and church groups, parties, or when any group gets together for fun.