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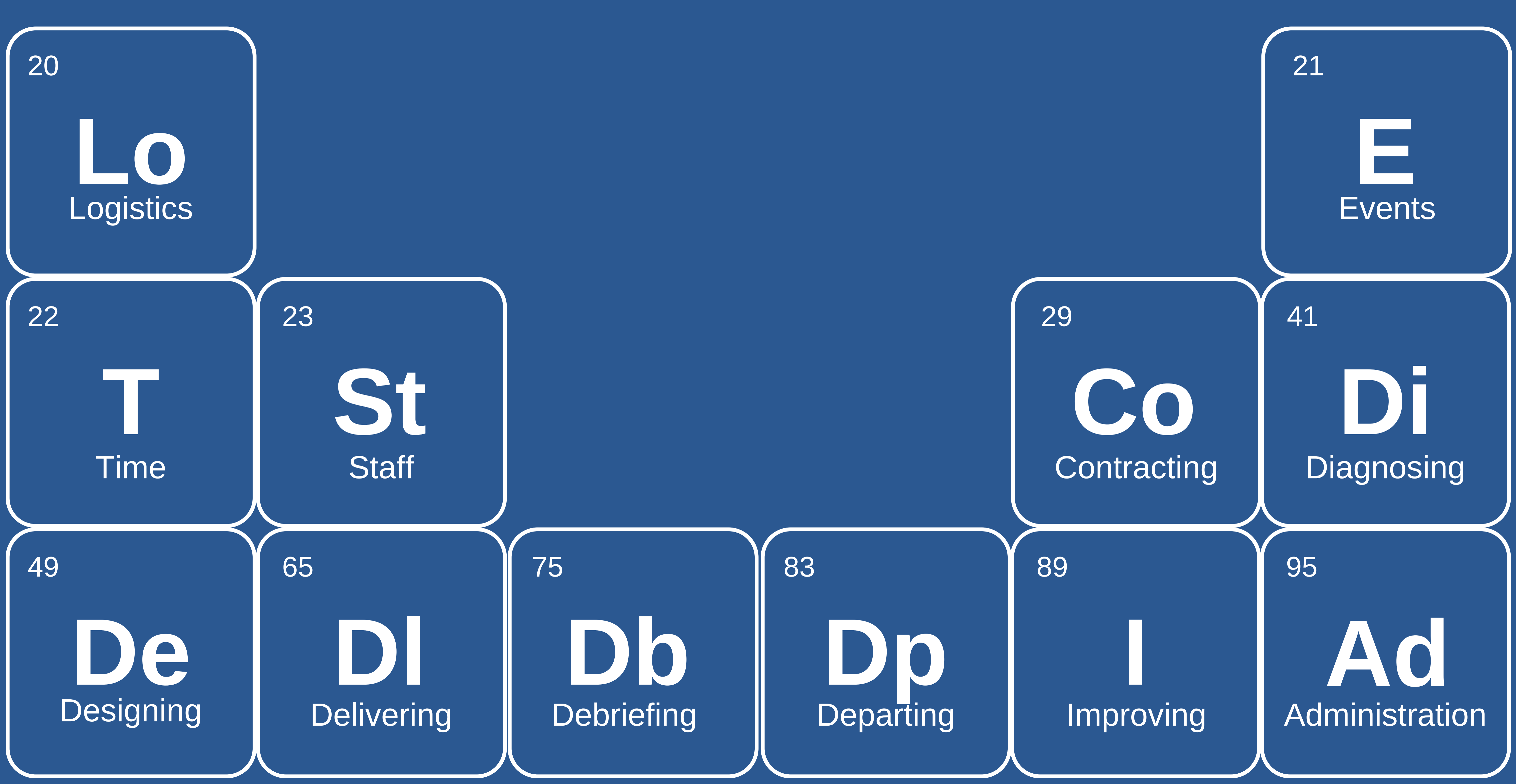
ESSENTIAL ELEMENTS OF EXPERIENTIAL PROGRAMMING



A UNIFIED APPROACH TO SUCCESSFUL EXPERIENTIAL PROGRAMS

JUDE HIRSCH & SIMON PRIEST

Essential Elements of EXPERIENTIAL PROGRAMMING

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DEDICATED to our fellow Canadian programmers
who have widely influenced our experiential learning.

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INTRODUCTION
to Experiential Programming

The ultimate success of experiential programs often seems to be hit-and-miss. Program facilitators change activities or facilitation techniques in response to assessment on an ongoing basis. To an outsider who is not familiar with this approach, it may look like "flying by the seat of one's pants" programming. However, practitioners agree that flexible adaptation "on the fly" is a valuable function of experience, training, and careful planning.

This book cannot replace experience. However, it can enhance training and contribute to careful planning by sharing comprehensive programming processes. Like many other complex processes in life, no single recipe exists for experiential programming. Effective programming is the result of careful, methodical thinking about a range of factors such as program goals, client characteristics, industry standards, staff qualifications, and hundreds of others. This book places all of these factors in the context of a unified approach.

"Experiential Programming" is for:

- **experiential practitioners** who have credible levels of technical expertise in adventure activities and less experience or training in program planning;
- **program administrators** who are competent at planning in other fields, but feel less prepared to supervise adventure or experiential programs;
- **academic educators** who teach courses, or sections within courses, that focus directly on adventure and experiential program planning; and
- **students** who are taking courses in program planning or outdoor leadership and adventure experiences.

"Experiential Programming" describes a complex process of many related components. Where possible, discussion of each component includes examples that help the reader to convert theory into practice and ultimately simplify the process by making it real and relevant. At the end of the book, additional resources are offered to enable the reader to gain a deeper understanding of concepts or strategies.

This book begins by defining the terms and concepts that are an important foundation to experiential programming. It continues by sharing two key models: the 5D Process and L.E.T.S. Plan. The 5Ds are Diagnosis, Design, Delivery, Debrief, and Departure. These refer to the major phases of the overall programming process. L.E.T.S. Plan is an acronym for Logistics, Events, Timing, and Staffing. These refer to the careful considerations and minor modifications that programmers must make in every 5D phase for different settings, client groups, and program goals.

Four case studies, representing different settings and client groups, are used as examples following key concepts throughout the book. Each of the 5D phases are then discussed in detail, with L.E.T.S. Plan influences noted for each phase. The book concludes with chapters on several administrative functions that support programming and with resources to help with future programs.

Jude Hirsch and Simon Priest.
Milledgeville, Georgia, June, 2004.

1
Definitions

This chapter defines words and concepts that are cornerstones of experiential programming. Definitions begin with the book title and its related terms, followed by stakeholders and program types.

Experiential refers to a philosophy of learning that is more than mere "learning by doing." All learning is experience-based, but for learning to become experiential, the doing or action step must be followed by a cycle of three steps: reflection, integration, and continuation (Figure 1). **Action** is "doing" the experience in a manner that is active rather than passive, and that demands engagement over observation. **Reflection** is identifying the lessons learned from the experience, usually during a debriefing session with a trained facilitator. **Integration** is transferring this new learning from the experiential environment to daily life, where learning shows up as change in feelings, thinking, behavior, or resistance. **Continuation** is a set of self-defined strategies to sustain the change in daily life.

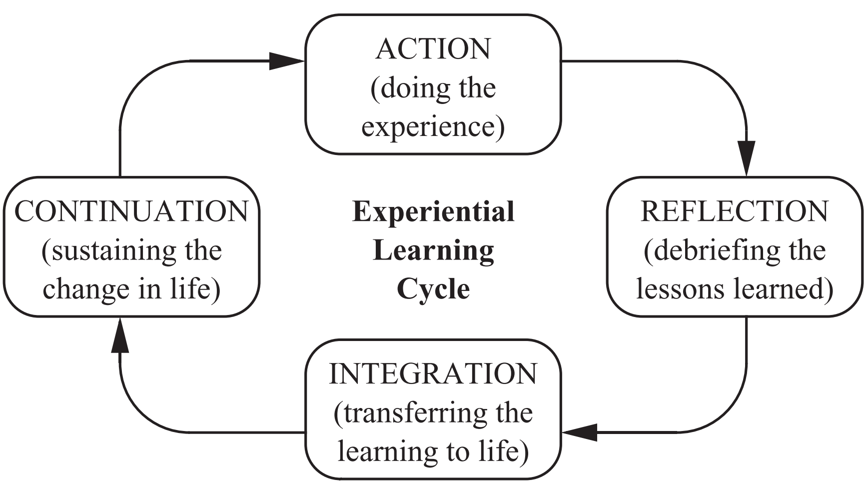


Figure 1: The Experiential Learning Cycle

Programming is the deliberate and purposeful arrangement of one or more activities and events (called the program) so as to create a series of potential learning opportunities that lead to changes in how people feel, think, behave, or resist (see program types on page 9).

Events and **activities** compose the action step of the experiential learning cycle. Events and activities commonly used in experiential programs include: rock climbing, whitewater paddling, caving, bicycle touring, cross-country skiing, and sailing. However, this list is by no means exhaustive, and any activity can become experiential by adding the other three steps of the experiential learning cycle.

Learning opportunities can be built around a single event or multiple activities by adding the reflection, integration, and continuation steps in order to create change in the way people feel, think, behave, or resist. For example, people may enhance their joy (feeling), increase their knowledge (thinking), improve their communication (behaving), or decrease their denial (resisting). Learning opportunities lead to change if people can develop an awareness, willingness, and commitment for change. Debriefing discussions, led by facilitators after events and activities, turn the learning opportunity into awareness, willingness, and commitment through the process of reflection, integration, and continuation.

The **program** is composed of planned learning opportunities, events, and activities; the planned steps of reflection, integration, and continuation; and the supporting logistics, staffing, and timing. Programs are planned to meet a particular purpose or client need (usually a change in their feeling, thinking, behaving, or resisting).

Outdoor adventure is a subset of experiential learning, when the outcome is uncertain, and where the action takes place in natural or human-made environments. Some typical outdoor adventure activities include: socialization games, group initiatives, challenge courses, nature travel, wilderness pursuits, or extended expeditions.

STAKEHOLDERS

Several groups and individuals hold stakes in a program's success. These stakeholders include program **consumers** (customers, clients, and the community) and program **providers** (suppliers, staff, and their profession).

Customers pay for the program, and they expect the quality of service to be commensurate with the provider's advertising. Customers usually request a program in order to meet a need for training, growth, rehabilitation, learning, and/or change.

Clients participate in the program, and their degree of motivation or involvement can ultimately determine the quality of service for that program. Clients directly benefit from the program outcomes.

A **community** creates the customer's obligation to request the program and indirectly benefits from clients completing the program. Examples include corporations, the judicial system, school boards, and society in general.

Suppliers plan and execute the program format in keeping with their vision and mission. The quality of their service determines whether they receive repeat business from a customer.

Staff prepare and facilitate the program content in keeping with the program purpose, goals and objectives. The quality of their work determines whether they remain employed and ultimately whether their employer stays in business.

A **profession** governs the operating procedures, ethics, and overall effectiveness of programs and their providers. One example of a profession is the Association for Experiential Education, or AEE, which is a membership-driven organization for outdoor experiential learning. The Resources Appendix offers additional organizations.

Distinguishing between customers and clients is important, because customers and clients can be the same person, as in the team leader who requests and participates in a team-building program. Knowing how and when to treat this person as a customer or a client can be critical to the overall success of the program. For example, sharing certain parts of the program plan would be very appropriate with a customer, but not with a client who might receive an advantage over other clients. Think carefully before treating clients as customers.

Differentiating between suppliers and their staff is also important, because the quality of a program may be linked differently to both roles. Understanding who is responsible for different aspects of program delivery and how each aspect contributes to the success of a program helps suppliers and staff to be more effective. For example, the most competent staff can only have limited effectiveness when working for a supplier with outdated equipment or inappropriate educational philosophies. Great suppliers are only as effective as the quality of staff they hire to implement programs.

Lastly, the differences between communities and professions are critical to determining who has the power to control the consumption and influence the provision of programs and services. For example, corporations and the judicial system can afford to be demanding of service quality because they are likely to be requesting a private program, while school boards and society in general have less power over decision making because programs for them are likely to be public or open enrollment. Consider the differences between public and private programs as described on the next page.

Professions also influence experiential programs. Their power to influence program quality is directly related to factors such as their range of membership, legislated requirements for the profession, or their ability to influence public perception. Some professions are extremely successful at lobbying legislative bodies and creating public perceptions about safety, environment, and participation issues that suppliers should be mindful of. Some professions offer accreditation or certification programs that serve as benchmarks for quality and standard of care. Suppliers who are aware of these professions are more likely to provide high-quality programs.

PUBLIC vs. PRIVATE

Programs are either public (open to general enrollment by anyone in a given population) or private (prepared for a specific closed group of people). **Public programs** are client-centered: clients are free to choose their participation; client needs help to determine program content or format; clients primarily benefit from program outcomes; and client satisfaction comes first. **Private programs** are customer-centered: customers direct client participation; customer needs help to determine program content or format; customers primarily benefit from program outcomes; and customer satisfaction is paramount. Table 1 summarizes some of these key differences.

PUBLIC Programs	PRIVATE Programs
Supplier, customer or client identify opportunities based on needs, trends and issues observed in the community	Customer realizes trends and issues in client and hires provider/supplier to further assess and address these needs
Client convenience drives venue, scheduling, equipment, facilities, transportation, communication, and other important logistical concerns	Customer convenience drives venue, scheduling, equipment, facilities, transportation, communication, and other important logistical concerns
Supplier has decision making power	Customer has decision making power
Client-oriented service	Customer-oriented service
Program and promotion create client demand	Program addresses client and customer needs
Results are widely generalized, but mostly directed at clients	Results address specific needs and issues in the community
Benefits to individual clients before customers and community	Benefits to community and customers before clients

Table 1. Summary of public and private programs

TYPES OF PROGRAMS

Programs can be classified into four types (recreation, education, development or redirection) according to their purpose or principal focus of change (feelings, thinking, behaving or resisting) as in Table 2. These four are hierarchical in nature, with each subsequent purpose including the primary outcomes from the previous types.

Recreation programs principally change the way people **feel** by re-energizing, entertaining, or relaxing them with a focus on fun, socialization, and enjoyment. In order to change client feelings, the inherent events and activities are sufficiently engaging and exciting to speak for themselves. Recreation programs emphasize the action step and have less focus on the other three steps of the experiential learning cycle, thus avoiding the need for formal facilitation.

Education programs principally change the way people **think** (and feel) through increased awareness or knowledge. In order to get clients to think differently, debriefing after the experience is necessary to compare and contrast ideas. Education programs emphasize the reflection step and thus require staff who have basic facilitation skills and can lead group discussions.

Development programs principally change the way people **behave** (think and feel) by increasing functional actions. In order to improve behavior, learning has to transfer back to real life. Development programs emphasize the integration step and need staff with intermediate facilitation competence who can utilize metaphors.

Redirection programs principally change the way people **resist** (behave, think and feel) by decreasing denial or opposition. In order to reduce resistance, change has to be sustained after transfer. Redirection programs emphasize the continuation step and demand staff who can apply therapeutic methods with advanced facilitation techniques (as discussed in Chapter 7 about the debriefing phase).

FOUR CASES

Four case studies are integrated throughout this book to provide examples of theory in practice. Because definitions have now been established, the four cases are presented as the starting point for experiential programming. Each case details the type of program, identifies key stakeholders, sets the context, and describes what is already known about the program. As the book progresses, these cases, set in shaded backgrounds, will evolve with more detail.

A RECREATION program called "weekend adventures" offered open enrollment opportunities with the intent of learning new skills, getting fit, and making friends. *This public program was focused on changing feelings so local family members (clients) could socialize, gain skills, enjoy nature, and enhance health. The parents paying the bill were the customers: they saw the value in getting outdoors as a family. The local town and county were ultimately the communities that benefitted from fitter and happier citizens. The supplier was the "City Parks & Recreation Office" (CPRO), which taught canoeing, with certified instructors and equipment provided. The American Canoe Association and the National Recreation and Parks Association were professional bodies for this case study.*

An EDUCATION program called "incoming orientation" was open to any first-year university student interested in achieving successful transition into college life from high school. *This public program was focused on changing thinking so that new students (clients) had increased resilience later in the academic year. The university administration was the customer: it saw the value of recruiting and retaining students who graduated. The university was ultimately the community that benefitted from successful students. The supplier was the "University Outdoor Center" (UOC) and its faculty, staff, alumni, or students who led backpacking trips. UOC was accredited by the Association of Experiential Education and belonged to the Association of Outdoor Recreation Education.*

A DEVELOPMENT program of "team-building" events was planned by a corporation with the intent of increased cooperation, enhanced trust, and improved communication among its co-workers, who were organized into multiple intact groups. *This private program was focused on changing behaviors so employees (clients) worked better together back at the office. The human resources department was the customer: it saw bottom-line profits coming from teamwork. The corporation was ultimately the community that benefitted from these profits. The suppliers were "Ropes Courses R Us" (RCRU), with a staff of contract facilitators and challenge course technicians. The Experiential Training and Development Alliance and the Association of Challenge Course Technology shared professional accountabilities for this study.*

A REDIRECTION program of "wilderness expeditions" was available for court-referred youth as an alternative to incarceration and with the intent of reducing dysfunctional behaviors such as substance abuse, status offenses, or property crimes. *This private program was focused on changing resistance so the adolescents (clients) could discover ways to behave functionally. The judicial system was the customer: it saw the value of reducing recidivism. Society was ultimately the community that benefitted from rehabilitated youth. The suppliers were "Hoods in the Woods Limited" (HWL), with a staff of professional therapists and outdoor leaders using multiple events and activities in the course of each wilderness expedition. The Therapeutic Alternatives Professional Group of AEE, the National Association of Therapeutic Wilderness Camps, the Outdoor Behavior Healthcare Industry Council, and a number of professional bodies that govern the events and activities chosen shared professional responsibilities in this case.*

All names of providers and suppliers are fictitious in this book, but professional associations are real. This will allow readers to gauge performance against the professional guidelines in place at the time of publication (July 2004).

PROGRAM	**RECREATION**	**EDUCATION**	**DEVELOPMENT**	**REDIRECTION**
CHANGES	FEELING	THINKING & Feeling	BEHAVING, Thinking, & Feeling	RESISTING, Behaving, Thinking, & Feeling
EMPHASIZES	ACTION: Enjoying the experience	REFLECTION: Learning the lessons	INTEGRATION: Transferring to life	CONTINUATION: Sustaining the change
EXPERIENTIAL	100% Doing (approximations)	75% Doing 25% Discussing	50% Doing 50% Discussing	25% Doing 75% Discussing
DIAGNOSIS	CONVERSATION	Conversation & INSTRUMENT	Conversation, Instrument, & INTERVIEW	Conversation, Instrument, Interview, & OBSERVATION
DESIGN	FANTASY Frames	REALITY Frames	CONTEXTUAL	ISOMORPHIC
DELIVERY	Focus on fun & play	Conceptual outcomes	Functional behaviors	Dysfunctional actions
DEBRIEFING	NONE: Facilitation not needed	BASIC: Funneling & Filtering	INTERMEDIATE: (Dir.) Frontloading	ADVANCED: Focus & (Ind.) Frontloading
DEPARTURE	Evaluation, Anchoring, & REUNION	Evaluation, Action Planning, Anchoring, & CHECK UP	Evaluation, Action Planning, Anchoring, & BOOSTER	Evaluation, Action Planning, Anchoring, & ONGOING
DURATION	Short	Moderate	Long	Extended
CASE STUDIES	*weekend adventures for local families*	*incoming orientation of university students*	*team-building for corporate coworkers*	*wilderness expedition of adjudicated youth*

Table 2. Summary of the four program types.

The examples chosen for the cases have been generalized to represent typical circumstances. At certain times, unique situations and exceptions to the rules have been highlighted. However, no case can exemplify all possible applications of experiential programming. Hence, think of these four cases as food for thought and not absolute recipes to be followed precisely.

Table 2 summarizes the principle differences among the four types of programs: recreation, education, development, and redirection. While these labels have gained wide acceptance in the field, the reader may also have come across earlier versions of this model that used the term "therapy" in place of "redirection." Therapy has become a confusing term because of its widespread use, misuse, and abuse (ranging from psychotherapy through chemotherapy to aromatherapy). Because all types of programs can be therapeutic in nature — and because therapy can result in feeling, thinking, behavior, and resistance changes — the term "redirection" is favored for programming, and "therapy" is reserved for other applications.

THE SWIMMING ANALOGY

The "Swimming Analogy" has long been used to describe facilitation techniques needed to work in each type of program (Priest, Gass & Gillis, 2000). The same metaphor can be extended to cover aspects of experiential programming. Basically, working in these types of experiential programs is like swimming in water of different difficulties. Avoidance of "drowning" depends on one's facilitation competence or swimming skills for that type of water.

Recreation is likened to a wading pond. The wading pond is warm, and the risk of drowning is minimal. The wading pond is the best place to learn how to put your face in the water and to blow bubbles in preparation for swimming. Recreation programs require less specialized skills for programming or facilitation. The focus is on doing activities with little formal facilitation.

Education is the shallow end of the pool. The shallow end is a safe place to gain competence at floating and treading water. It has a low risk of drowning for those with basic skills. Education programs are focused on reflection, with facilitators who have basic skills. Time is set aside for group discussions and guided reflections using funneling and filtering.

Development is the deep end. The deep end has a high risk of drowning and demands the ability to swim on and under the water. Development programs are focused on integration, with facilitators who have intermediate facilitation skills. The time set aside for group discussions is roughly equal to time spent doing activities.

Redirection is wild whitewater! Whitewater is frequently turbulent and often cold. The risk of drowning is occasionally extreme, so swimmers wear flotation devices and understand how to maneuver in order to avoid rocks, rest in eddies, and ferry across strong currents. Redirection programs are focused on continuation, with facilitators who have advanced facilitation skills. More time is spent in group discussion than in doing events or activities. The clients might be difficult to work with and require the use of specialized psychotherapeutic techniques by a trained therapist.

Once in a while within this book, aspects of programming differ depending on the type of program. Remember, the descriptions in this book are suggested guidelines for thinking about experiential programming and are not required laws. They should be modified as needed to suit specific contexts and clients.

2
Models

This chapter outlines two key models used to explain experiential programming and related planning. The first model is a process of 5Ds: **Diagnosing, Designing, Delivering, Debriefing, and Departing** (Priest, Gass & Gillis, 2000). The second model, L.E.T.S. Plan (Priest & Hirsch, 2000), focuses on **Logistics, Events, Time, and Staff**. L.E.T.S. Plan refines and complements the 5D Process. Both models will vary across and within program types, thus highlighting that programming is a complex and dynamic process. They work in tandem — reciprocally informing one another.

5D PROCESS

The 5D Process includes five major phases of experiential programming as shown in Figure 2 (Priest, Gass & Gillis, 2000). Pre- and post-phases in this process include contracting beforehand with a customer and improvement afterward based on evaluations.

Although the diagrammed model shows a linear relationship (for ease of explanation), it can easily become cyclic by connecting the ends (where one program leads into the next). Furthermore, in complex programs, some phases may skip, repeat, overlap, or merge into one continuous process. For example, recreation programs can skip the debriefing; education programs might overlap the delivery into the debriefing phase; development programs can have multiple learning opportunities, events, or activities with repeated delivering and debriefing; or redirection programs may merge ongoing debriefing into the delivery phase. Competent and flexible facilitators will engage in ongoing diagnosis throughout the delivery and debriefing phases to redesign the program in midstream.

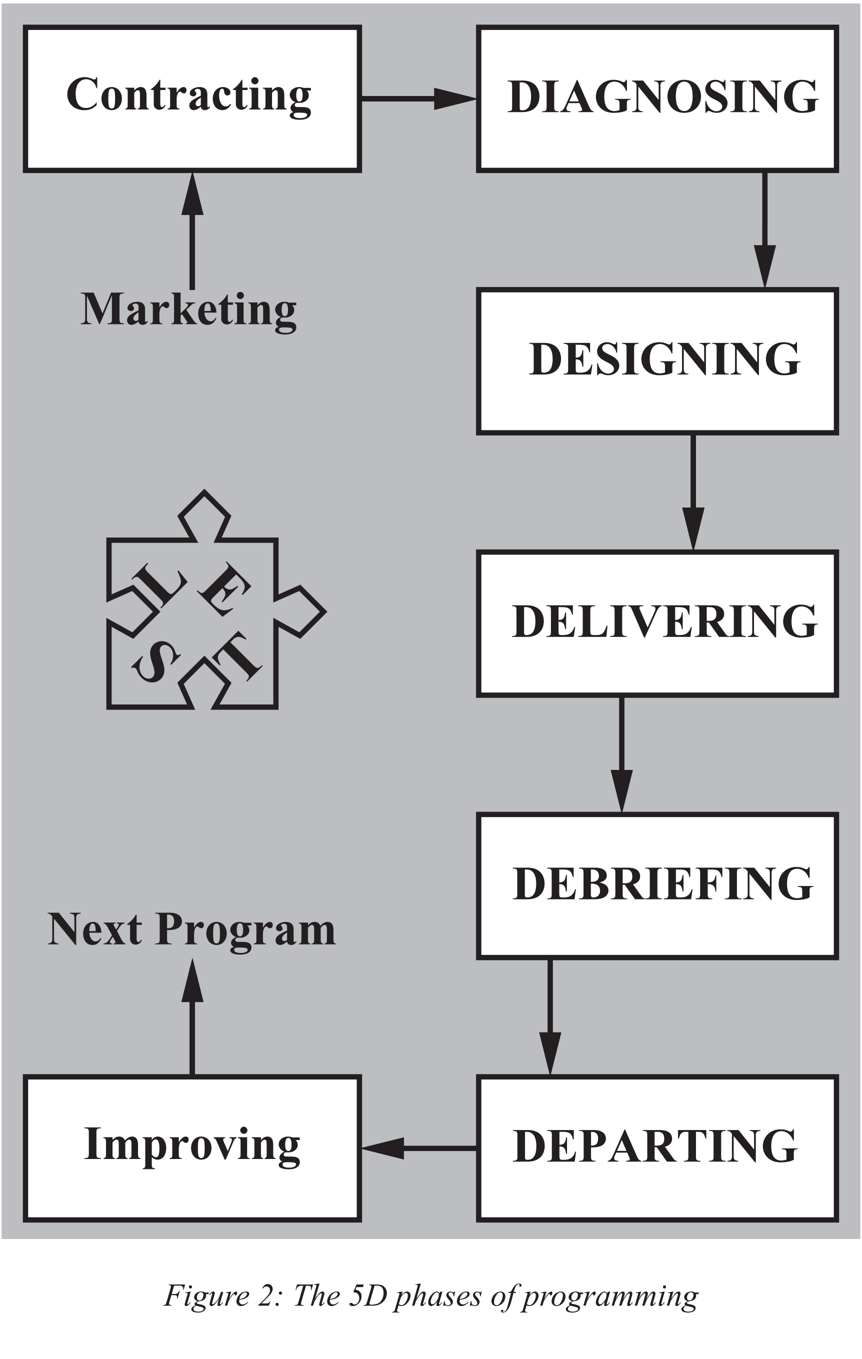


Figure 2: The 5D phases of programming

Contracting involves everything from an initial inquiry by a customer; through negotiations on content, format, logistics, or costs; to a signed contractual agreement with partial payment.

Diagnosing refers to assessing the needs of clients, customers and the community by using conversations, instruments, interviews, and observations that are within the contracted boundaries.

Designing is planning the program based on the assessed needs from the diagnosis and involves refining the program purpose, goals, and objectives while making decisions about L.E.T.S. Plan elements.

Delivering involves presenting the program as planned in the design phase (with introduction, body of events, and conclusion) while remaining flexible and changing parts of the program as necessary.

Debriefing discussions, or nonverbal alternatives (depending on the type of program delivered), are where the reflection, integration, or continuation steps of the experiential learning cycle take place.

Departing means that clients will leave the program after writing action plans, completing evaluations, receiving anchored souvenirs, and scheduling an optional follow-up (checkup or booster) session.

Improving relies on receiving and using detailed feedback about program and related service quality from stakeholders (customers, clients, community, subcontractors, suppliers, staff, and profession).

L.E.T.S. Plan stands for Logistics, Events, Timing, and Staff. Examples of some L.E.T.S. Plan components that are integrated throughout the 5D Process are: activities and events, framings, group assignments, staff, scheduling, equipment, venue, facilities, catering, accommodation, transportation, communication, staffing expenses, finances, evaluation, and other logistics.

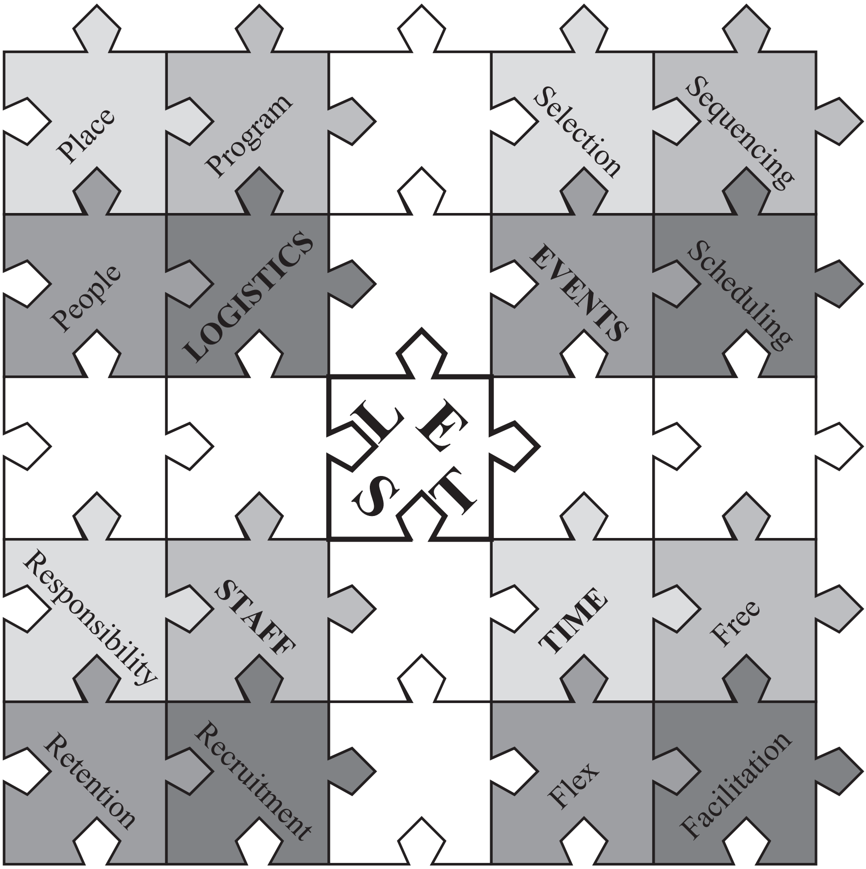
L.E.T.S. PLAN

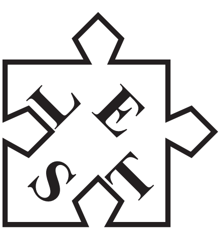
Interwoven with the 5D Process of experiential programming is the L.E.T.S. Plan (Hirsch & Priest, 2004), which addresses **Logistics, Events, Time, and Staff** as shown in Figure 3. The puzzle image implies that each critically important piece of logistics, events, time, and staff has to be in the right place! To achieve this correct placement, each piece is filtered through a complex combination of L.E.T.S. Plan criteria:

- **program purpose** (what is being changed and learned?);
- **supplier mission** (what are we capable of providing?);
- **staff capabilities** (what are they competent to deliver?)
- **professional standards** (what are our guiding principles?);
- **customer satisfaction** (what is high-quality service?);
- **client needs** (what was determined from diagnostics?);
- **community culture** (what will this group accept/reject?);
- **public policy** (what are the governing regulations?);
- **risk management** (what is safe, prudent, or reasonable?);
- **available resources** (what is beyond impossible?); and/or
- **situational constraints** (what are our performance limits?).

By remaining vigilant to the above criteria, programming becomes realistic, meaningful and relevant, rather than fake, haphazard, or biased. Top-quality programs come from surpassing these criteria, not from doing what we personally prefer despite the criteria.

According to L.E.T.S. Plan, **logistics** includes everything that is done to address these criteria for the people, place, and program. **Events** (activities) are selected, sequenced and scheduled according to the above criteria. Within these criteria, **time** incorporates free time, facilitation time, and flex time. **Staff** are recruited, retained, and held responsible in consideration of these criteria. These four components and their subcomponents are discussed on pages 20-23, and their considerations are summarized in Table 3 (pages 24-25).





L.E.T.S. Plan Criteria

Public Policy
Risk Management
Available Resources
Situational Constraints

Program Purpose
Supplier Mission
Staff Capabilities
Professional Standards
Customer Satisfaction
Client Needs
Community Culture

Figure 3: L.E.T.S. Plan

LOGISTICS include everything that is done to address the L.E.T.S. Plan criteria for the people, place, and program. **People** logistics include gathering and disseminating information before the program, such as medical and legal forms, clothing and equipment lists, registration and evaluation materials, or any and all preparatory work (such as prerequisite reading or training).

Place logistics relate to the venues, facilities, indoor spaces and/or outdoor environments. Venues can range from five-star hotels through conference centers to rustic residential camps. Consider parking, comfort, scenery, security, distractions, and interruptions. Facilities, such as a challenge course or climbing wall, might require special permission and have rental costs associated with them. Be certain to check the construction and maintenance of these facilities, because occupiers assume a portion of responsibility for keeping clients safe. Indoor spaces, useful for debriefing, watching videos, or completing paperwork, might be necessary in some climates and seasons. Check lighting, temperature controls, air quality, noise, open space dimensions, and furniture. Outdoor environments, the mainstay of most adventure and experiential programs, might require access permits, fees, reservations, and licenses. Furthermore, route plans and contingencies will need to be created for the novelty, local conditions, and site characteristics of each area.

Program logistics include budget, finances, equipment, supplies, communication, transportation (hired or personal), accommodation, catering (food and drink), risk management (safety), and contingency planning. Staff will also have a set of their own logistical needs that can be dealt with separately or in conjunction with the above.

EVENTS are selected, sequenced, and scheduled according to the L.E.T.S. Plan criteria. **Selection** of events is also based on their ability to meet specific goals and objectives and their match with client maturity, experience, comfort or familiarity. In some cases, the selection of events is limited to a predetermined curriculum or a set of pre-approved exercises from which staff may choose.

Sequencing of events begins with checking client readiness for each activity (more on this later) and ends with the events being placed in an order that makes sense. Progressions include from known to unknown, from inductive to deductive, from basic skill to mastery, from observation to abstraction, from primitive to sophisticated, from reality to theory, from piece to whole, from simple to complex, and from general to specific. For the right reasons, all of these sequences can be reversed, provided that doing so is in the best interest of clients.

Scheduling of events (also see time) takes into consideration the time of day, season, or weather that best suits some activities, and the fatigue levels, thirst/hunger, or body temperatures of clients. Events are arranged within the daily itinerary of groups. Time is allotted for introductory and concluding activities, and time is reserved for facilitation.

In the L.E.T.S. Plan criteria, TIME incorporates free time, facilitation time, and flex time. Once events are scheduled, **free** time should be added for clients to relax, recover, exercise, socialize, network, drink, eat, sleep, and take "bio-breaks!" Client free time is a good chance to hold staff meetings, because staff are not involved with clients at this time. However, depending on staff numbers and program duration, staff will need free time as well.

Remember to allow ample **facilitation** time. This is time for preparing clients to engage in or help them reflect on their learning opportunities. It is often the most difficult time to plan for, resulting in too little or too much time dedicated. Recreation programs might need facilitation time for instruction, introductions, conclusions, activity briefings, and planning, but not debriefing time (because it is not a necessary part of changing feelings). However, education, development, and redirection programs will need additional time for facilitated debriefings and reflective discussions. A reasonable rule of thumb is to allot equal time to doing an activity and debriefing it in development programs, but to provide more time for redirection and less time for education programs. Approximate percentages are expressed in Table 2 on page 12.

Build in sufficient **flex** time. Since nothing ever runs on time due to the high uncertainty of experiential programs, be flexible about events or facilitation running over (be ready to drop some content) or finishing early (have some extra energizer or filler games on hand). Expect the unexpected delay (due to time moving between events, people getting lost or injured, weather or teaching opportunities). Recall Murphy's Law: what can go wrong, will!

STAFF are recruited, retained, and held responsible in consideration of the L.E.T.S. Plan criteria. Staff **recruitment** occurs after the number of staff is calculated by assigning clients to groups (more on this later) and considering appropriate staff-to-client ratios for each event or activity. Staff may be hired for their leadership qualifications, learning philosophies, activity skills, overall competency, age/maturity, gender, talent, ethics, fitness, experience, past performance, and certifications.

Staff **retention** relates to pay (salary or honoraria), benefits (health care or discounts), and other rewards (vacation or downtime to recover between programs). However, keeping staff can be difficult in a field that has historically emphasized short-term contracts. Providing complementary training goes a long way toward satisfying staff. In addition, clear staff policies and enforcement of discipline issues (dual relationships with clients, theft, or substance abuse) can aid with the flip side of retention: dismissal of some staff members in order to ensure program quality and a better work environment.

Staff **responsibilities** and roles should be very clearly explained and willingly accepted by staff well in advance of the program. Accident response, facilitation methods, and local or standard operating procedures should be second nature to staff before clients arrive. Furthermore, understanding with whom they are co-leading or co-facilitating (especially if that co-worker is from another agency), and spending prior time getting to know their partner, can make the difference between program success or failure.

LOGISTICS	EVENTS
PEOPLE • information dissemination and collection • risk management forms • registration and evaluation • equipment lists • pre- and post-assignments • maximum and minimum numbers • group assignments • personal, group, and individual equipment • staff needs	**SELECTION** • complexity • difficulty • duration • facilitation strategies • novelty • staff prior experience and comfort level • access to equipment and location • proximity to other events • client readiness • customer preference • fillers
PLACE • venues and spaces (indoor and outdoor) • cost • transportation • parking • reservations and permits • construction, maintenance, and inspection of facilities • route options • natural and cultural history • terrain • venue personnel resources and responsibilities • proximity to emergency support	**SEQUENCING** • client readiness • skill progression • risk management policies and procedures • progression format • ongoing diagnostic opportunities
PROGRAM • budget • equipment reservations • maintenance and inspection of equipment • supplies • communication • access • accommodations • catering, menus, food acquisition • transportation • awards, participation cards, or certificates • promotional contacts	**SCHEDULING** • structure • time of day • travel to the site • travel between events • weather • natural features • fatigue levels • energy and hydration levels

TIME	STAFF
FREE • eating • sleeping • bio-breaks • exercise • reflection • social interaction • staff meetings	**RECRUITMENT** • ratios • training and certification • experience • availability • commitment • performance assessments • philosophy • activity skill sets • age and maturity • gender • ethics • fitness • insurance
FACILITATION • introductions • housekeeping • activity briefings • instruction • planning • debriefing • teachable moments • planned chance opportunities	**RETENTION** • salary or honoraria • expenses • equipment • health care • internal and external training • professional development support • discounts • opportunity for advancement • rewards and recognition • organizational culture • formal and informal interaction with other staff • access to professional information
FLEX • unplanned chance opportunities • unexpected delays • weather • incidents • route finding • equipment • client readiness	**RESPONSIBILITY** • clearly defined roles • accessibility to policies and procedures documents • employment contracts and job descriptions • supervision procedures • planning time • co-facilitation teams

Table 3: Summary of key L.E.T.S. Plan components

The L.E.T.S. Plan is like a jigsaw puzzle combined with a sliding puzzle (as shown in Figure 4). Not only must each piece fit, but it also must fit in relation to all others. As each piece of the puzzle is dropped into its correct place, it consequently influences the pieces that have already been positioned, and several pieces might need to be replaced or repositioned. For example, adding one more staff member with his or her equipment might require different transportation.

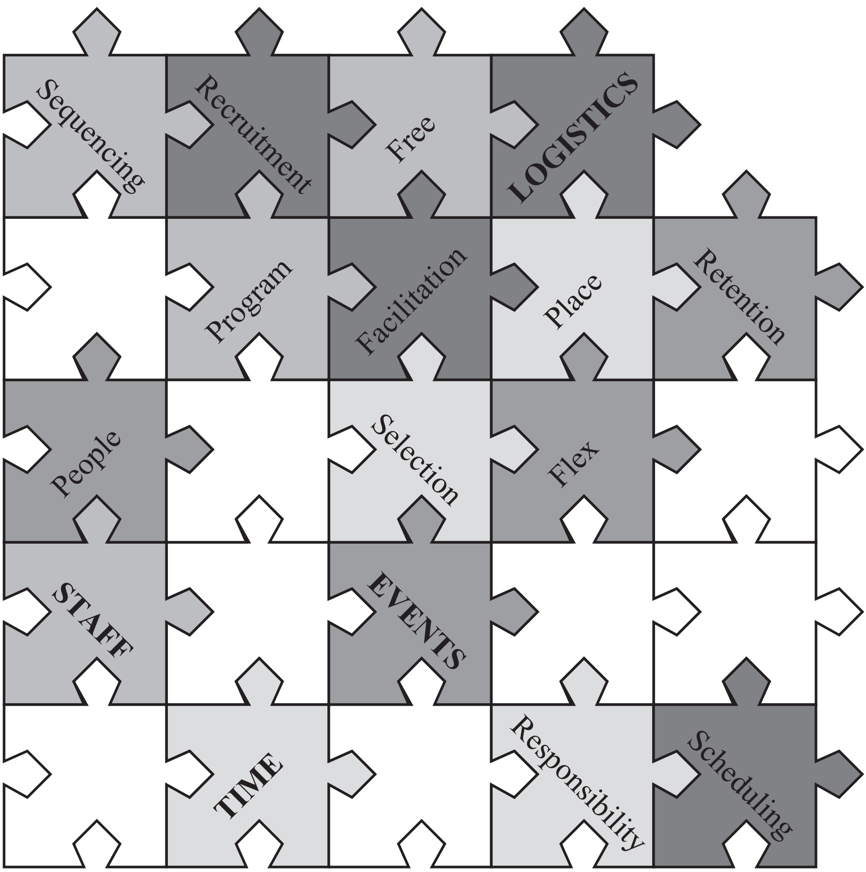


Figure 4: The L.E.T.S. Plan sliding jigsaw puzzle

From time to time in this book, as we progress through the 5D Process of experiential programming, jigsaw puzzle pieces are used to represent the influence of one or more L.E.T.S. Plan components. In this way, the two models that are used to explain experiential programming are integrated throughout the book.

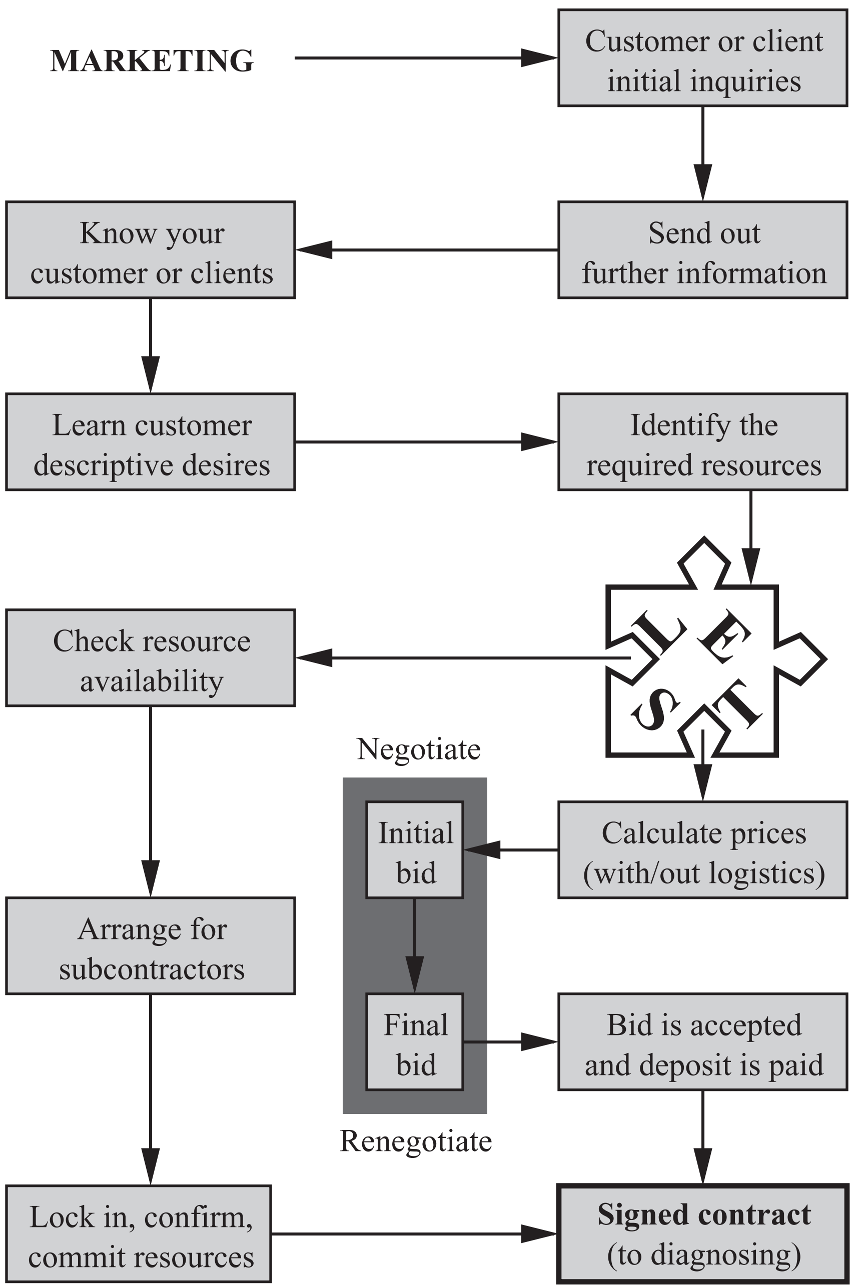


Figure 5: Steps in the CONTRACTING Phase

3
Contracting

Contracting involves everything from an initial inquiry by a customer; through negotiations on content, format, logistics, or costs; to a signed contractual agreement with partial payment.

To begin, **marketing** is intended to generate leads where customers make initial inquiries about programs. **Sales** personnel usually handle the negotiations that take place after the initial inquiry and lead to a signed contract. The complexities of sales and marketing are beyond the scope of this book (Chapter 10). In smaller suppliers, program staff may also perform sales and marketing functions, and often a program coordinator or director will handle these early steps before passing the program on to other staff. If this is the case in your organization, be certain that program staff are not compromised by the creation of sales agreements they cannot fulfill. Ensure that trust, cooperation, and communication are excellent among all staff members involved in providing and contracting the program.

The salesperson or staff member having initial contact with customers must be well versed in the **benefits and procedures** of experiential programming. These people may or may not be the ones who design and deliver the program; but they must know their business well enough to project a positive image and engender confidence in the customer. Speaking authoritatively about the processes and benefits of experiential programs is, perhaps, a supplier's second most important marketing strategy. Effective delivery of experiential programs that meet customer and client needs is first and foremost.

In the early steps of contracting, the customer and client can be the same person, especially in public programs with open enrollment. So, the terms customer and client are used interchangeably in this chapter.

Customers or clients make **initial inquiries** based on learning about the provider through marketing or other forms of intentional or unintentional promotions (word of mouth, websites, brochures, conference displays, print media, cold calls, etc.). These customer or client **leads** can come via the phone, e-mail, postal letter, personal appearance, or through an agent who acts on a customer's behalf.

In response to these leads, **send out further information** that addresses topics not covered by other marketing materials. This critically important information include sample programs, descriptions, locations, testimonials, and prices. A timely and accurate response is absolutely necessary at this time. The quality of information you provide goes a long way toward helping the customer or client decide to use particular services.

Next, get to **know customers and clients** well. Make it your business to become extremely familiar with them and learn about:

- WHO they are (including their position and reputation);
- WHAT they do (products, goods, services, or functions);
- WHERE they are located (neighborhood, offices, etc.);
- WHEN they are available (times, dates, durations, etc.);
- WHY they are interested; and, most importantly,
- HOW your program can help them to solve problems.

Some sources for finding out about a customer or client include: colleagues, the Internet, newspapers, libraries, and even friends or family. In many cases, an initial discussion with the customer may provide the bulk of this information; however, entering into negotiations over program content, format, and price with a clear and comprehensive understanding of the customer is very important.

Customers initially may describe some preliminary preferences such as program type, number of clients, activities, venue, duration, staffing, or outcomes. Eventually, you will need to know all of their

descriptive desires: their ideal wish list. However, during an initial inquiry, you may simply want to make general notes about these and delve into greater detail once you have their serious commitment. Some customers might not want to tell you all of this information until they are sure you are the best supplier for them.

If the customers consider you a prospective provider of programs after receiving your further information, they will contact you again to describe more of what they want in a program and to find out whether you are able to deliver. This is the time to delve deeply into detail and capture their descriptive desires. Ask questions such as:

- WHO are your clients (numbers, demographics)?
- WHERE is your preferred location or venue?
- WHEN are the preferred dates (and duration)?
- WHY is this program important (solution, fix)?
- HOW does this program relate to other programs?
- IS this program a first experience for you/your clients?
- DO you have any further special needs or concerns?
- WHAT is the most important change you want to make: the way people feel, think, behave, or resist?

The answer to this last question helps you determine the type of program: recreation, education, development, or redirection. If the customers reply that they want to change everything, get them to narrow their focus to the most important change sought.

Make notes and record your initial thoughts on the resources needed to deliver on these descriptive desires. These **required resources** might include the full gamut of the L.E.T.S. Plan or just a few of its key components. The insights gained while considering required resources provide for future discussion with staff and customers. However, at this point, they provide some sense of program purpose, structure, logistics, and staffing needed for developing a contract.

Contracting between customer and supplier, or supplier and third-party vendors (subcontractors), has L.E.T.S. Plan implications for logistics and staff. Events and timing can be finalized later, in accordance with activities and scheduling. However, considerations such as venue, facilities, catering, accommodation, and transportation should be arranged in advance. Equipment should meet professional safety standards. Staff should be qualified and competent.

At this point, estimate the number of staff needed to serve the number of clients and their possible arrangements in groups by using established guidelines and activity ratios. Next, determine the extent to which supporting logistics such as equipment, supplies, venues, facilities, transportation, accommodations, and catering are needed. Lastly, prepare a rough budget that considers the financial costs of these required resources and a percentage over these that represents an acceptable **profit margin** for the supplier. For example, some suppliers charge a **flat fee** (per person, per day, including all costs), while other suppliers charge a **variable rate** (base charge, plus expenses and an additional percentage to cover administrative costs). The flat fee is best when program expenses are fixed (using one's own staff and supporting logistics with controlled costs). A variable rate is best when program situations are unstable (staff or supporting logistics are subcontracted or their costs are out of your control). The key is to make sure the finances are reasonably accurate and that flexibility is built in so you can make program adjustments later.

Sometimes customers may ask for **differentiated prices** because they have access to their own equipment, facilities, or other program elements, or because they are deferring costs to other agencies, clients, budget lines, or third-party vendors. If requested, determine whether these arrangements are satisfactory to you and will not compromise program delivery. For example, if the customers or clients are providing their own equipment or using in-house staff, be certain their equipment meets professional safety standards and their in-house staff are competent to deliver an experiential program. Either way, all such substitutions must be clearly spelled out in the contract to avoid confusion and potential sources of liability.

If a customer wants to know **fixed costs**, provide a breakdown of the requested items with your profit margin or administrative cost included. For example, if clients are having lunch and your cost is fixed at $12 (caterer price of $10 plus administrative cost of $2, or a 20% profit margin), present these calculations to your customer. If the lunch has a fixed number of lunches (for example 100), present the cost of the entire meal ($1,200 for up to 100 people), and explain that there is an extra cost ($15) for each meal that is made up on demand for any latecomers beyond the limit of 100. State maximum and minimum numbers in these situations and be prepared to negotiate.

Despite your best efforts to anticipate all costs in the contracting phase, some unexpected expenses will arise, and other costs might change over time. Prepare for this by building flexibility into the budget by slightly overestimating or rounding up the prices of those items you might reasonably expect to increase (gas or insurance).

You will need to check **resource availability** for all logistics and staff very carefully. If the program relies on subcontracted equipment, supplies, venues, facilities, travel, transportation, accommodations, or catering, then book these as needed. Contact subcontractors and get written quotes (by fax or e-mail) confirming their prices and terms for use. Be sure you can meet their terms.

If the number of required staff exceeds those in your immediate employ, find subcontractors from a regularly updated staff pool list. Do NOT deliver a program that is understaffed or uses substandard staff. Chapter 7 on Debriefing outlines the necessary facilitation techniques that staff should possess for each program type.

Give careful consideration to calculating the costs of these resources and how costs could be influenced by slight changes. For example, adding extra staff members might cause consequential increases because of new staff salaries, extra equipment rentals, more meals, or additional housing for those staff. If price is based on a cost-per-person formula, determine minimum and maximum numbers that will ensure **cost effectiveness** for your organization.

Once calculations are complete, you are ready to make an **initial bid** to the customer. This is typically done verbally or in writing and is delivered by phone, fax, e-mail or in person. The initial bid should include client numbers, program dates/duration, location, other logistics, prices, estimated expenses, change/cancellation policies, and signature lines for the customer to accept the contract.

At this point, the customer may accept the bid, reject it, or **negotiate** program content, format, and/or costs. Successful negotiation hinges on making customers aware of options, explaining the value of those options, and then customizing the program to suit their requests. If your bid is rejected, do your best to find out why and use this information to improve future bids.

After the negotiation, once again, the customers may accept, reject, or **renegotiate** the new bid. If renegotiations take place, be careful not to make concessions that prevent you from delivering a safe and effective program of which you can be proud. At some point, you will need to either let go of the job and encourage the customer to go elsewhere, or you will reach a reasonable agreement.

If agreement is reached, "**lock in**" staff, logistics, and other key resources. Contact all subcontractors and confirm that they are committed to the dates and terms you had agreed upon earlier.

Lastly, put the **final bid** in writing as a contract. Develop a standard contract that can be customized to each program and has been reviewed and approved by a legal adviser. Be certain to detail the agreement with inclusions and exclusions as noted below:

- parties to the agreement (customer and supplier);
- program dates, times, location, venue, etc.;
- client numbers (maximum and minimum limits);
- program prices and payment terms;
- mutual promises, covenants, and conditions;
- roles and responsibilities of customer and supplier;
- cancellation and change policies;
- deadline for return;
- terms for renegotiation once the contract is signed;
- additional terms (inclusions and exclusions); and
- signature lines (to indicate acceptance by all parties).

Give the customer sufficient time to check the contract and confirm client participation in the program. Offer your help with making a client presentation in person or over the phone to cement the deal.

Once you have a **signed contract**, receive approximately 50% of the program price in the form of a **deposit** before beginning diagnosis. With such an advance payment in hand, you can spend money on purchases for program events, and/or make deposits on necessary subcontracted staff and logistics. Begin the diagnostic phase at the appropriate level for the type of program contracted.

CASES (contracting)

A RECREATION program called "weekend adventures" offered open enrollment opportunities with the intent of learning new skills, getting fit, and making friends. *The "City Parks & Recreation Office" (CPRO) marketed its leisure programs in a widely distributed brochure at the beginning of each season. This program was advertised as an eight-hour American Canoe Association (ACA) introductory course that followed a set training curriculum. The day included a swim test, equipment information, stroke instruction, and a short trip on local waters. The ACA course was described as a way for families to make new friends while learning canoeing skills and getting fit outdoors. Full payment was required upon registration, and a reduced program price was offered to families providing their own equipment.*

Prior to publication of the brochure, CPRO decided to offer the ACA class and priced its program on the basis of ACA fees and costs for instructors, equipment, and administration. CPRO hired two local ACA instructor-certified staff to teach the course and rented canoe equipment from a local outfitter. A county-maintained park on a local lake was chosen as the venue. Contracts with each of these subcontractors were finalized in advance of the program. Once the minimum registration was reached, subcontractors were contacted and informed that the course was proceeding as planned.

Families who inquired about canoeing were sent information or directed to the CPRO website, where they found detailed information about cost, times, dates, locations, clothing, weather alternatives, and policies on cancellations and equipment use. Families who registered were asked to complete medical and legal forms, answer some written questions, and return them at least one week before the program began. One week prior, staff were able to use this information to fine-tune their set training curriculum.

An EDUCATION program called "incoming orientation" was open to any first-year university student interested in achieving successful transition into college life from high school. *Senior members of the campus administration approached the University Outdoor Center (UOC) and asked them to develop a proposal for incoming orientation. UOC staff asked administrators about their vision and desires for the orientation and retention of students. They heard a thorough wish list, that incoming students would know university resources, support one another, and interact with faculty and staff. UOC identified its resources: on-site (food service, print shop, motor pool, campus housing, and student affairs) and off-site (location reservations, backcountry permits, and camping fees).*

UOC proposed several five-day programs. Each program included a day of group development activities on campus, a three-day backpacking trip to various state locations, and a final day of outdoor adventure activities (rafting or climbing, depending on locals). Their proposal was accepted, and the university agreed to pay all program costs and staff expenses as calculated from a budget using the resources above. After registering, students paid a nominal fee to cover their fixed in-field expenses for food and personal equipment rental. Volunteer staff were immediately secured and began training. University employees were given release time to volunteer. UOC developed an internal contract with the administration that was compliant with university policy and clearly indicated roles, responsibilities, and terms for each party. UOC also developed external contracts with third party vendors to support the backpacking trips, rafting and climbing. These contracts addressed insurance coverage, staff qualifications, equipment, location, and budget.

Interested students read about the program in admission materials, obtained additional information by talking to UOC staff, and got an equipment list from a UOC website. Registered students returned completed legal and medical forms that were later used by UOC staff to fine-tune some of the activities in each week of programs.

A DEVELOPMENT program of "team-building" events was planned by a corporation with the intent of increased cooperation, enhanced trust, and improved communication among its co-workers, who were organized into multiple intact groups. *After receiving an excellent word-of-mouth referral from an organizational change consultant, the Director of Human Resources e-mailed "Ropes Courses R Us" (RCRU). The Director received an e-mail attachment with a nicely presented summary of team-building approaches and testimonials. The Director reviewed further information on the RCRU website and sought references from past RCRU customers.*

RCRU staff learned all they could about the Director's company from the company's website and annual reports. When the Director called back, RCRU staff learned that the Director wanted behavioral changes achieved through a team development program with improved communication, increased cooperation, and enhanced trust for newly formed teams.

After hearing the dates that clients were available, RCRU began checking the availability of subcontracted staff and catered venues with well-equipped challenge courses near company headquarters. Once sufficient staff and a suitable place had been found, RCRU bid a three-day challenge course experience with a single day follow-up a month later at the company offices. The Director negotiated for financial savings on accommodations and agreed to pay a premium for higher quality meals. The adjusted bid was accepted, and the Director signed on behalf of the corporation. The final bid included program, venue and catering quotes, with estimates for staffing, equipment, challenge course use, and administrative costs.

After receiving a 50% deposit, RCRU confirmed venue, catering, and facility reservations, locked in subcontracted staff, and ordered diagnostic surveys and program supplies. RCRU staff then sent out medical and legal forms to each employee and received completed forms that were later used to screen for potential problems.

A REDIRECTION program of "wilderness expeditions" was available for court-referred youth as an alternative to incarceration and with the intent of reducing dysfunctional behaviors such as substance abuse, status offenses, or property crimes. *"Hoods in the Woods Limited" (HWL) was aware of the need for a prison alternative for youth. It approached the judicial system with a presentation proposing a 32-day program for small groups to live in and travel from a wilderness base camp, and to participate in multiday, seasonally appropriate outdoor pursuits under the care of trained therapists and outdoor leaders.*

HWL made a final proposal to the judicial system. After many meetings, it decided on intake processes, client characteristics, staffing ratios, treatment plans, staff qualifications, evaluation procedures, program concepts, compliance with professional standards, accreditation requirements, and budgetary costs. Its reputation, as a licensed treatment program using adventure to help youth achieve healthy behaviors and effective relationships, resulted in complete funding approval for its redirection wilderness expeditions program with a full and complete range of services.

After getting its first payment, HWL began hiring and training staff, purchasing equipment, conducting reconnaissance trips, obtaining permits, getting diagnostic materials, preparing menus, and ordering food. It subcontracted for bus transportation to and from the base camp that it had rented for the season. New HWL staff began sifting through the application files of potential youth (with completed medical and legal forms included) and started thinking about how the various client characteristics might influence later program design efforts. The staff planned to learn more about their clients during the intake process.

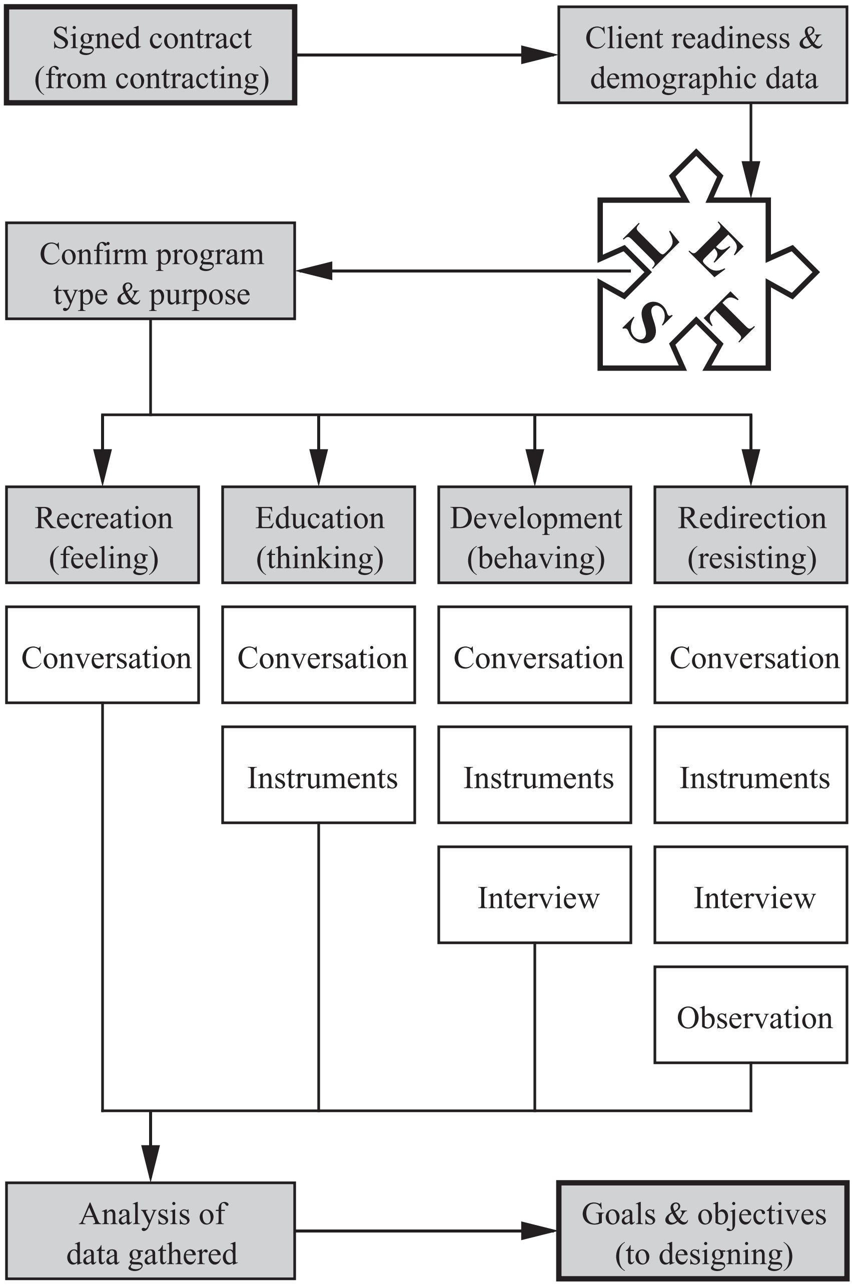


Figure 6: Steps in the DIAGNOSING phase

4
Diagnosing

Diagnosing refers to assessing the needs of clients, customers and the community by using conversations, instruments, interviews, and observations that are within the contracted boundaries. The key to this phase is knowing which diagnostics to use for which programs. As a rule, more complex program types deserve more thorough diagnostics. Figure 6 summarizes the principal differences.

With a signed contract in hand, and permission to begin diagnosis, programmers typically find out all they can about their clients by collecting **readiness and demographic data**. Information gathered at registration for open-enrollment public programs, or from the customer for privately requested programs, is the best source for getting to know the client group. Genders, ages, past experience, maturity, and background histories are basic data that help you to better understand their preferences and capabilities.

Some staff work with specific client groups and understand their emotional, physical, social, and intellectual needs well enough to pre-design programs that are client appropriate. Alternatively, some staff work with a range of client groups or find themselves in new settings and need to consider information about a different client group in order to develop a program. Every client group is composed of individuals with different learning styles, levels of maturity, and expectations. Within certain homogeneous groups, individuals can be expected to have a range of diagnosed emotional, social, intellectual, and physical developmental needs that should influence later decisions about program design. Get to know clients before you meet them by becoming familiar with their stages of development and other background information.

The L.E.T.S. Plan concerns for this phase are: having competent staff who can effectively conduct diagnoses, such as interviews or observations, and then analyze resulting data; having access to the necessary data collection logistics (surveys or question protocols); and having sufficient time and permission to complete instruments, conduct interviews, or observe clients in action.

Diagnosis actually begins during the descriptive desires step of the contracting phase, when you asked customers the question, "What is the most important change you want to make: feeling, thinking, behaving, or resisting?" Their answers **confirmed the program type and purpose**. Diagnosis also continues at all phases throughout the program, because good experiential programming is flexible enough to make adjustments in the program as new information is obtained about what is best for the clients. New information is often discovered during debriefing sessions and occasionally during other phases. New data can be used to redesign a program "on the fly."

In all types of programs, a **customer conversation** is necessary to confirm the type of program (recreation, education, development, or redirection) and to confirm the program content and format (price has already been agreed upon, but could change if the customer wanted to change content or format after the contract was signed). This conversation is a good time to ask a **miracle question**. The answers customers provide to the miracle question outline their expectations and needs for a high-quality experiential program:

> *After this program is over, you will be talking with family, friends, and colleagues. In the course of your conversation, you might happen to state, "That was the best experiential program ever. It was a miracle, because ..." How would you finish that sentence?*

Used in all but recreation programs, **instruments** are an inexpensive way to gather information about client needs and then to balance their needs against the descriptive desires of the customer. Instruments include standardized tests and homemade surveys. In their simplest form, they involve answering questions on paper by marking a response to each item with pen or pencil. More modern versions can be completed online or by telephone.

When more than one person completes an instrument, these responses should be averaged over the entire group to avoid identifying any particular individual. Any comments written on surveys should be reported with equal anonymity, and all respondents have the right to total confidentiality of their responses. These guidelines and others ensure ethical use of instruments and protect the rights of clients.

In development and redirection programs, **client interviews** are necessary to highlight their needs and provide valuable information to confirm or contradict the data gathered by survey instruments. In a private meeting between only the interviewer and interviewee, a series of questions probe into greater detail about client needs. Although many questions can be asked, interviews can concentrate on **other miracle questions**. Client answers reveal their expectations and can be compared to those of the customer. This example is for a team member participating in a development program:

> *One morning, you wake up, and you find a miracle has happened overnight. Your past concerns have evaporated. Your team is now working together extremely well. What has changed? How is the team*

> *different? What did you do to make it happen? How did your team make the adjustment?*

In a **focus group** (interview of many people with a common bond), clients can be asked to share their answers publicly, but they must feel safe in doing so, without fear of retribution or retaliation from others. A focus group may include peers and exclude supervisors or persons of authority to help clients feel emotionally safe when sharing sensitive thoughts. The interviewer asks questions of the whole group, and their answers build on each other until a clear picture emerges about their needs.

Observation of clients in action is often warranted in preparation for redirection programs. At this level, where resistance prevails, confirmation of dysfunctional behavior is critically important to the success of a program. Observations should concentrate on content of behavior as well as format of behavior, and look for examples of dysfunction or resistance to change, such as arguing, blaming, and treating one another with disrespect.

While these major forms of diagnosis are common, they do not have to take place in any particular order or with precise dedication to a type of program. The model shown here is a guide; change it to suit specific needs. However, be warned that complex programs (development or redirection) can fail if the only diagnoses conducted are those meant for simpler programs (recreation or education).

Overall, the secret to conducting effective diagnosis lies in using **multiple methods** and in gathering data from **multiple sources**. That is why, in all but recreational programs, more than one form of diagnosis is recommended, and more than one person is diagnosed. The use of multiple methods and multiple sources allows for corroboration of gathered data and avoids reliance on a single piece of information that could be faulty. These data or information sets are extremely valuable during the design phase.

Once data have been collected, they are analyzed. As both an art and science, **data analysis** can be as simple as counting the frequency of numeric responses or as complex as interpreting meaning from patterns of observed behaviors. Analysis is performed differently depending on whether the data are quantitative (numbers) or qualitative (comments, attributes, and characteristics).

Quantitative data are typically analyzed by the use of statistics. For diagnostic work, only descriptive statistics are necessary, such as measures of central tendency (mean, median, or mode), variability (range, variance, or standard deviation), frequency (count, percent, or histogram), and distribution normality (kurtosis, skewness, or homogeneity). Consult a textbook to learn more about calculating and correctly interpreting descriptive statistics for quantitative data, or solicit assistance from someone who knows statistics.

Qualitative data can be analyzed by looking for patterns (similar, different, related) in the observations and comments that are seen, heard, or read by the interviewer or observer. These patterns are discovered by looking for the most common content in the key words of observations and comments that have been turned into written sentences. Again, consult a textbook or expert for assistance in learning how to analyze and interpret the various patterns in qualitative data.

Once statistics describe the quantitative data, and/or patterns are identified in the qualitative data, some obvious **goals and objectives** should be apparent. For example, highest (or lowest) statistical outcomes should highlight areas of strength (or weakness) in a group's teamwork, while common comments about a person (or his/her repeated behaviors) should expose some areas for improvement. These become goals and objectives: to improve collaboration, to reduce competition, to take more risks, or to stop criticizing others. Along with the program purpose, these goals and objectives drive the design and planning of the program.

CASES (diagnosing)

A RECREATION program called "weekend adventures" offered open enrollment opportunities with the intent of learning new skills, getting fit, and making friends. *In addition to the readiness and demographic information collected from each family during registration, the "City Parks & Recreation Office" (CPRO) staff asked family members more questions at the program start. Participating families were asked how they felt about canoeing, what kind of paddling experience and swimming ability they had, what they were most looking forward to, and what they would like to learn. Answers to these questions helped CPRO staff to shape pre-paddling swim tests, plan the instructional sequence for canoe strokes, and examine options for the afternoon paddling trip. Because many people over- or under-estimate their technical skill level, CPRO staff utilized a range of novice and expert questions.*

An EDUCATION program called "incoming orientation" was open to any first-year university student interested in achieving successful transition into college life from high school. *In addition to collecting readiness and demographic information from students at registration, the "University Outdoor Center" (UOC) asked students what they thought about coming to campus and living away from home. A customer conversation with the administration included the miracle question: If a miracle happened overnight and students made a successful transition to university life, how would this campus and those students be different? On the basis of answers ranging from critical thinking through maturity to good judgment, UOC staff adapted an existing instrument that measured the likelihood of college success with factors like cognitive-structural evolution, psychosocial development, and moral-ethical reasoning. Each student was asked to complete the survey with anonymity and confidentiality. The results of the quantitative data analysis were used to set goals, assign students to groups and identify individuals who might need special assistance as the program progressed.*

A DEVELOPMENT program of "team-building" events was planned by a corporation with the intent of increased cooperation, enhanced trust, and improved communication among its co-workers, who were organized into multiple intact groups. *Corporate employees were obligated to attend this training program. In addition to contracting questions that identified a desire to change behavior, and a customer conversation that identified better trust, cooperation, and communication as major goals for the program, "Ropes Courses R Us" (RCRU) staff gave a standard teamwork survey to all employees. On the basis of employee responses, RCRU staff purposefully selected several individuals for personal interviews. A staff member met with each and asked questions that probed into the behavior among team members and within the team. Qualitative data analysis of this confidential and anonymous process yielded several working hypotheses that drove staff in their later program design.*

A REDIRECTION program of "wilderness expeditions" was available for court-referred youth as an alternative to incarceration and with the intent of reducing dysfunctional behaviors such as substance abuse, status offenses, or property crimes. *Based on the readiness and demographic information collected from judicial system and government agency files, "Hoods in the Woods Limited" (HWL) excluded youth with histories of sexual assault and violence, because staff lacked training to cope with those issues. HWL staff had a customer conversation with juvenile justice representatives and learned that lowering recidivism was their priority. HWL staff then gave standardized surveys and conducted intake interviews with the youths about their behaviors and resistance. Analysis of the quantitative and qualitative data indicated consistent concerns with substance abuse, status offenses, and property crimes. Prior to the wilderness expeditions, HWL staff observed youth interactions in a series of games and socialization exercises that confirmed their behaviors, and provided evidence that their resistance could be changed. This information guided staff in program planning.*

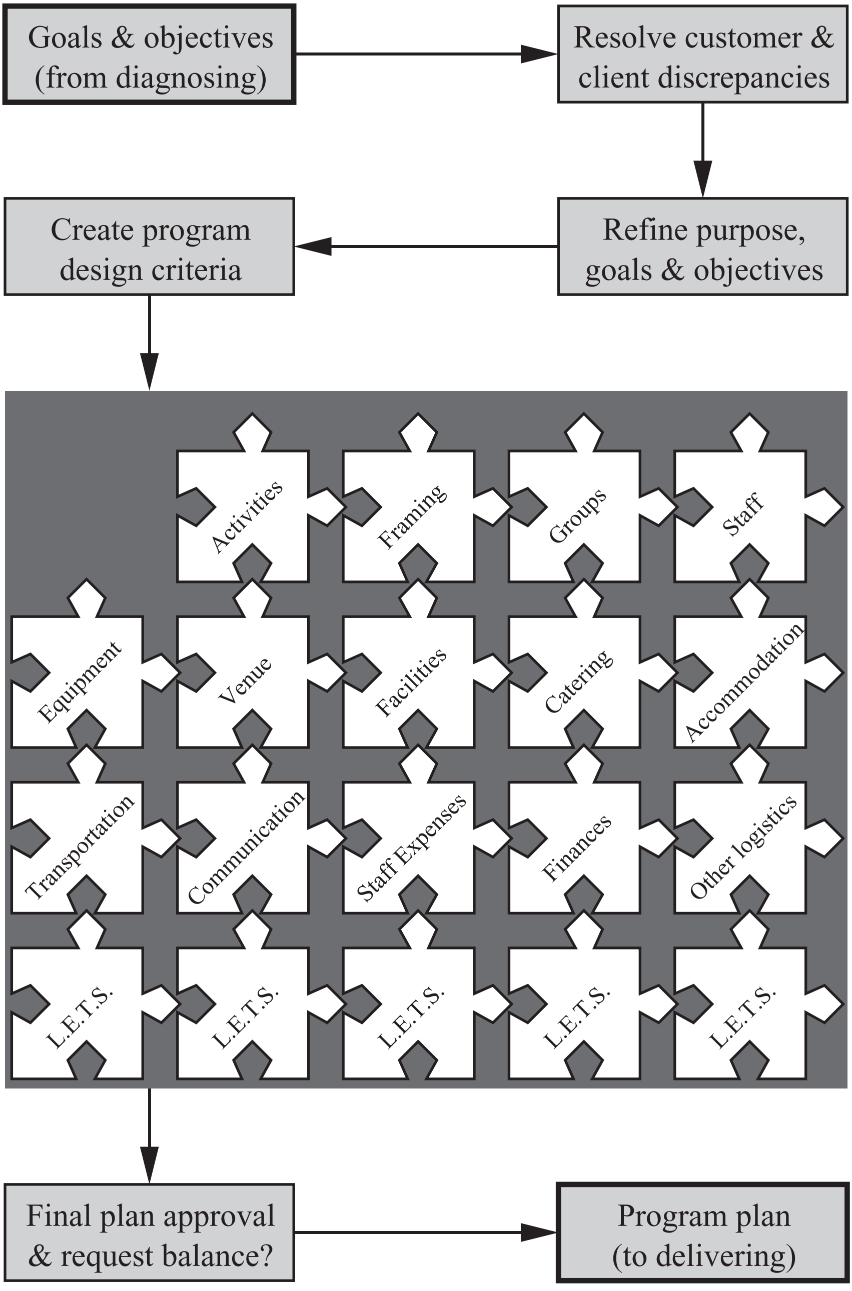


Figure 7: Steps in the DESIGNING phase

5
Designing

Designing is planning the program based on the assessed needs from the diagnosis and involves refining the program purpose, goals, and objectives while making decisions about L.E.T.S. Plan elements.

Data analysis should have led to some obvious **goals or objectives** used to translate program purpose into valuable outcome statements. For example, earlier diagnosis might have shown a need for group members to work on trust and communication or for individuals to work on confidence and leadership. These client needs become program goals and objectives that guide the program design and are used to check the alignment between the type of program and client needs. For example, behavioral-change goals and objectives in a changing-feelings program, or vice versa, is a recipe for failure.

The start of the design phase is where customer descriptive desires and concerns from contracting are balanced with client needs and issues from diagnosis. Sometimes these will be mutually exclusive and in direct competition. When **discrepancies cannot be resolved** between what customers and clients want, renegotiate the contract or consider not offering the program and referring the customer to another provider who might better address the discrepancy.

In most cases, some common ground between customer and client wish lists can be found. Begin with the **program purpose** as established at the outset. The type of program (recreation, education, development, or redirection) should direct all else that follows in the design phase, because different types of programs are designed with different emphases and for different purposes. Simply put, recreation programs are designed for joy, fun, and entertainment (to change feeling). Education programs are designed for learning new concepts and generating awareness (to change thinking). Development programs are designed for high performance and enhanced function (to change behavior). Redirection programs are designed for addressing negativity and reducing dysfunction (to change resistance). These fundamental differences must be kept in mind during the design of every experiential program.

If the obtained data indicated a different program purpose, the refinement would need to be discussed with the customer, because a totally new design might void or alter original contracts. Expect the program to change on the basis of emerging client needs and for some customers to want varying levels of input during the design phase. Be prepared to negotiate program design with a customer and to set boundaries that will ensure that quality is not compromised. If you make a major change in the plan as you progress, be certain to check with the customers and get their approval. The ultimate intent is to customize the program to meet and surpass their expectations.

Before beginning the actual design process, create a list of **L.E.T.S. Plan criteria** (see page 18). These are intuitive guiding principles that must be kept in mind throughout the design process. Some will come from program goals and objectives or client characteristics; others will come from site characteristics or environmental conditions. They often include specific guidelines related to the supplier or the customer about resources, standards, culture, learning or teaching philosophies, policies and procedures, or secondary outcomes. Design decisions are filtered through these criteria.

For example, anyone who has worked with very young children knows they are not the best at sitting still and staying on a topic of discussion. L.E.T.S. Plan criteria for this group might limit events to 30-minute durations and discussions to 10 minutes, while selecting activities that encourage full participation by all. Many adult groups need frequent or longer breaks (so they can socialize and network), and they do not want to be outside in extreme temperatures for long periods. L.E.T.S. Plan criteria for adults in an outdoor setting might include extra breaks in close proximity to indoor facilities, and the program plan might have socialization or networking exercises built into longer breaks.

Some experiential programmers begin the program design process by imagining a day-by-day or hour-by-hour schedule for the program and then placing known or "taken" blocks of time, such as meals, meetings or sleeping, into the format. Once obligatory events are placed, program activities can be put into the remaining open blocks of time. Other experiential programmers start by making a list of potential events that will contribute to the achievement of goals and objectives, are appropriate for specific client characteristics, and meet the established L.E.T.S. Plan criteria. They borrow their ideas from: past programs with similar clientele, professional journals, other program suppliers, workshops, and conference presentations. A few experiential programmers merge these two approaches of time and activities or events by doing both simultaneously.

Once the program purpose, goals, and objectives are known, and the L.E.T.S. Plan criteria have been established, the way you begin designing doesn't matter, as long as it works for you and your clients. Program design is a creative process of simultaneously considering many interrelated elements and deciding which is best for each situation through critical examination, adaptation, and modification, and then making the decision to proceed.

The potential decisions that follow integrate many of the L.E.T.S. Plan components and place particular emphasis on all of the event and time components, with some of the logistic components (others done prior) and a few of the staff components (others done post). Here is a typical order (Priest & Gass, 1997), that can be resequenced as preferred. Because some elements depend on others, a natural order will appear with practice. The trick is to get started with your choices and to think of each as a decision to be made.

1) Select, sequence, and schedule **activities and events** according to increasing difficulty, complexity, and the need for instruction. Be certain these activities will fit with the allotted time or program duration and that ample opportunity is scheduled for free, facilitation, and flex time. Ensure that the use of these events will also successfully address the purpose, goals, and objectives of the program.

2) Prepare **framings**, or thematic introductions, that enhance the meaning and relevance of the activities or events. As a general rule, use fantasy frameworks (playful introductions) for recreation programs, reality frames (precise introductions) for education, contextual (general life analogies) for development, and isomorphic (exact life metaphors) for redirection programs. Incorporate customer themes or messages as requested or customize as needed.

3) Make **group assignments** on the basis of personal objectives and how many people should be in each group. Either randomly assign people to small groups or purposefully select groups by who can benefit from membership with and without others, or for other reasons. Assign roles, or have group members decide their own roles. For example, put a leader in each group, not all of the leaders in the same group.

4) Assign **staff** to the program and to newly formed groups. Hire and assign staff for their competence, work to retain them, and clearly explain their roles and responsibilities.

5) Secure **equipment** that will be needed for the program. Be sure to schedule time and other resources for clients to learn how to use the equipment. Keep extra or spare equipment and necessary

maintenance gear available. Prepare props, materials, or supplies as required. Clients are not normally permitted to substitute personal gear for any program equipment because of liability issues. However, in some cases, and with permission from the supplier, the use of personal gear is appropriate.

6) Decide on a **venue** that suits the evolving program design. Venues can range from wilderness areas through summer camps to resort parks. Pick a venue for its ability to support the program activities or events, and consider the weather, proximity to emergency response services, and usable outdoor areas. Make reservations, arrange for required permits or permission, and prepay all venue fees. Sometimes, customers may require a certain venue; make sure their choice is safe and acceptable.

7) If the venue has special **facilities** that are not part of the basic contract, they may need to be reserved separately. It is advisable to pay facility fees, or some portion of them, in advance. Facilities can range from challenge courses through classroom spaces or meeting places to indoor restrooms. Choose facilities for their potential to enhance activities and events. Check the safety, construction, and maintenance of the facilities to be used.

8) **Catering** refers to what clients and staff will eat or drink during the program. Food can range from client-prepared one-pot meals through prepackaged box lunches to fancy restaurant buffets. Catering should match the program and clientele. Occasionally, catering is mandated when using certain venues that provide food.

9) **Accommodation** refers to where clients and staff will rest or sleep during the program. Housing can range from top hotels through rustic cabins to tarp tents. Accommodation should suit the program and clientele. Frequently, accommodation is obligated in conjunction with particular venues that have housing.

10) Clients may require **transportation** to and from the venue or facilities. Transportation can range from aircraft through watercraft to buses, vans or client vehicles. Some suppliers or customers will own vehicles or rent them from a regular supplier that may be used for transporting staff, clients, and/or equipment. Do NOT carry clients in staff personal vehicles, and make sure clients who are using the own personal vehicles are aware that you are not responsible for their safety or security at those times.

11) **Communication** may be a part of a program in which groups need to be in regular contact with each other, or apart from a program in which clients need to be isolated from the outside world. Know which is best for a given program, and remember to consider appropriate emergency equipment and backup procedures. Provide emergency communications (radios or cell phones) for staff.

12) **Staff expenses** include a set of separate logistical concerns, such as travel, housing, meals, clothing, and gear. When staff need to travel to reach a program, their airfare, car rentals, and ground transport may need to be arranged in advance. Staff may need to be housed and fed independently from clients, and they may need to be provided with separate clothing and equipment. Some organizations do not permit staff to use personal gear for liability reasons, or because clients may benefit from seeing staff use program gear. When staff are permitted to use personal gear, policies should clearly indicate the process by which approval is given and in what situations the use of personal gear is appropriate.

13) **Finances** are reviewed and revised constantly to ensure fiscal success and procedural integrity. In some cases, the customer is part of the financial management system, especially when variable costs that will influence the bottom line are deferred to the customer. At those times, the supplier should communicate regularly with the customer about finances. Also, staff should be encouraged to do everything within budget and with concern for profit and loss.

14) **Other logistical** considerations revolve around such things as extra staff and redundant equipment. Simple programs with low client numbers expect staff to do it all, while complex programs with higher numbers utilize specialized additional staff to free facilitators from duties such as equipment management, venue liaison, and gopher tasks. Extra staff can also substitute for staff that take ill or are called away to other duties. Also, taking extra equipment makes sense on large programs in which the likelihood of equipment failure is greater with large amounts of gear in use. Use this category to think about what you could use to build redundancy into the program design.

As you work through each L.E.T.S. Plan element, hold all elements against the standard of "Do these pieces fit with the program purpose, goals or objectives?" As each L.E.T.S. Plan element is addressed, consider, "Does placing this piece change any of the previously placed pieces?" Remember the idea of a sliding puzzle presented earlier and remain flexible enough to make changes as necessary in order to design a high-quality program that meets the needs of customers and clients. The design phase is where the L.E.T.S. Plan becomes a valuable tool for ensuring that the entire program includes all of the necessary considerations and that each piece is in the right place in relation to the program and all of its components.

Lastly, double- and triple-check everything to arrive at a **final plan**. Check the final plan with the customer and seek approval with signature. Once the customer has approved the design, you may or may not choose to invoice the customer for the balance of payment (the remaining 50% after the earlier deposit). Invoice based on what your contract arranged in advance. If program changes occur, you can charge for those after the program is completed. Once you have the approved final plan, you are ready to deliver the program.

CASES (designing)

A RECREATION program called "weekend adventures" offered open enrollment opportunities with the intent of learning new skills, getting fit, and making friends. *Because this was a public program, and because clients and customers were the same families, no discrepancies between needs were noted, and refining the program purpose, goals and objectives was not necessary. However, L.E.T.S. Plan criteria that staff created included concerns for environmental forces, skill levels, and social interactions. So they planned to learn strokes out of the wind, offer a variety of practice stations, and mix families, so people could make new friends and children would be free to learn without parental interference.*

"City Parks & Recreation Office" (CPRO) was offering a standard American Canoe Association (ACA) introductory course. The two ACA instructors initially were hired during the contracting phase on the basis of their instructor certifications, experience working with children and families, and qualifications in lifeguarding, first aid, and canoe rescue. Luckily, the two staff had worked well together in the past.

ACA instructors were given permission by CPRO to adapt or modify the set training curriculum according to their L.E.T.S. Plan criteria. The ACA instructors planned to play several canoe games with the families in order to hone newly learned skills and have fun. Staff chose canoe hockey and developed a fantasy framework in which paddles became hockey sticks and an old flotation cushion was the puck. During lunch, families would be invited to plan their afternoon trip, with an opportunity to learn about map reading and paddling safety. Throughout the day, time was allotted for bio-breaks and lunch, but not for debriefing. Staff used the downtime to discuss their progress and to compare notes.

Because ACA instructors had split families in the morning according to their L.E.T.S. Plan criteria, they assigned clients to two groups on the basis of prior canoe experience. In the afternoon, they reunited families for the trip. In the morning, one staff member supervised each group, and they shared scout and sweep positions on the afternoon trip. The two staff divided responsibilities during the entire day. Each took a turn teaching strokes, while the other observed and gave corrective feedback. One greeted and organized the families, while the other managed paperwork, inspected personal equipment, and prepared specialized equipment and program supplies.

ACA instructors provided specialized equipment, such as maps, first-aid kits, water-safety posters, teaching aids, and registration cards. Some families brought their own personal canoes, paddles, PFDs, and outdoor clothing according to the lists they received at registration. For families whose gear did not meet safety standards, and for those who did not bring gear, CPRO rented extra program equipment and provided spare clothing. Two walkie-talkies helped staff to communicate with one another across open water, and their cell phones were available in case of emergency.

Because CPRO had selected a well-managed park on a local lake, a nice beach was available for boat access and egress from the water. The beach also was a great place for families to eat their home-made lunches and play after parking their personal vehicles. No special facility, accommodation, or transportation was needed for this program.

CPRO and the ACA instructors met to double- and triple-check this final plan. All registered families had paid by the time the program was delivered.

An EDUCATION program called "incoming orientation" was open to any first-year university student interested in achieving successful transition into college life from high school. *Because this was a public program, and because clients were not consulted on their desires and the customer wish list dictated the design, no discrepancies between needs were noted, and refining the program purpose, goals and objectives were not necessary. However, L.E.T.S. Plan criteria that staff created included concerns for gender and the appropriate use of volunteer staff and faculty. So they planned to have males and females in their own tent groups, with mixed activity and travel groups, and to tie debrief discussions into campus support services, with a University staff or faculty assigned to each group.*

The "University Outdoor Center" (UOC) proposed this program to be a day of group development, three days of backpacking and a day of rafting or climbing. The group development day was planned as a series of several exercises to be introduced in real terms and debriefed for connection to transitioning between home and campus life. That evening, the backpacking trip would begin with instruction and packing. The next morning, the groups would be driven by UOC staff in minibuses to the trailhead. That afternoon, the next day, and the following morning would see the students traveling as a group, camping, cooking, and debriefing their experiences around personal growth and resilience for campus life. On the last day, the group would meet the rafting or climbing vendor and spend the day engaged in seemingly risky activities, with debriefing about the need to support one another.

UOC staff were the lead facilitators for this program because of their outdoor leadership competence and prior experience working with university-age students. However, each student group had university staff, faculty, alumni or graduated student volunteers to help by providing perspectives of their own past campus survival, sharing information on support services, and working as assistant leaders. These volunteers had received training from UOC over *the previous year in wilderness first aid, facilitation, backpacking, climbing or rafting, and had participated in a team-building day that found them working well together prior to arrival of students.*

Personal equipment, such as boots, clothing, and toiletries, was provided by the students according to a list they received at registration. Program equipment, such as tents, backpacks, and sleeping bags, was provided by the UOC. Specialized equipment, such as rafts, Personal Flotation Devices, ropes, and helmets, was provided by the third-party vendors. Communication was by two-way radios and cell phones, with a UOC staff chosen to go for help during the backpacking trip and an emergency contact on campus with a pager and a copy of the risk management plan for the trip.

Venues were on-campus and off-site. On-campus venues included rooms and outdoor spaces for meetings and activities. Meals and housing were provided by campus food services. Off-site permits were arranged during the contracting phase and were paid in advance. However, UOC staff contacted land management agencies in advance to check the conditions of trails and access roads. Based on recent information, they planned their route options with contingencies for emergency exits and with flexibility in case opportunities for change arose. In doing so, they took into account other L.E.T.S. Plan criteria, such as the need for progressive challenges, physical fitness, and accessibility. Food for the trip was purchased and packed prior to the program by UOC staff using state credit cards or purchase orders.

To double- and triple-check the program plan, UOC staff and all volunteers held a dress rehearsal the week before students arrived. The university transferred the balance of payment to the UOC, and the final program plan was ready to deliver.

A DEVELOPMENT program of "team-building" events was planned by a corporation with the intent of increased cooperation, enhanced trust, and improved communication among its co-workers, who were organized into multiple intact groups. *Because the corporation had been working its employees long and hard, the employees were very happy to have the break from day-to-day business, but were more interested in having fun than addressing their teamwork. This discrepancy between client and customer needs was addressed by building extra fun into the first day and downplaying debriefs. This did not lead to a refinement of purpose, goals, or objectives, but it did highlight the L.E.T.S. Plan criterion of providing recreation opportunities for employees. These opportunities showed up as more play and less work, and longer breaks for employees to check their messages or respond to problems back at the office.*

"Ropes Courses R Us" (RCRU) was originally prepared to do a challenge course-only program, but because the customer emphasis was on teamwork, and its challenge course philosophy was individually oriented, it chose to make the first two days about group initiatives and move to high ropes only on the last day, when the group had become a team. Its approach to group initiatives called for doing activities that focused on the tools of teamwork one at a time, and then, once those had become individually functional, to test the teamwork tools in synergy with more complex events.

RCRU staff selected several group initiative activities that would address the separate tools of trust, communication, and cooperation in that order. They then picked a few longer and more complex events that required all three to function well together. They fit those activities into the first two days, while providing ample time for bio-breaks and office check-ins.

Early "games" were "played" for fun, but later initiatives were framed for a business context. By successfully completing the *initiatives, employees were actually behaving the way the company wanted in a simulation of work. The transfer back to work was made easier by the use of metaphors.*

Because employees were already assigned to their intact work groups, no further organization was necessary, but RCRU staff were assigned to work with groups on the basis of their extensive experience with functions such as sales, marketing, finances, operations, technologies, and call centers. According to the emerging plan, each group would have a facilitator and a technician. Facilitators would present the activity or event with an introductory frame, observe group behaviors, and debrief learning opportunities. Technicians would set up, manage safety, and take down activity props and equipment. The partnerships would depend on the pair's ability to work together as their own team, and might be enhanced on occasion by the addition of a third HR company trainer with intimate knowledge of the current situation in the office.

Equipment and props varied depending on the activity or event chosen by RCRU staff. The venue was an executive conference retreat with an extensive challenge course and a battery of group initiatives for staff to choose from. Staff avoided the ones they had no experience with, and used the ones they were most familiar with.

Meals would be catered, with buffet breakfasts, box lunches, and full-service dinners with wine (no physical activity was scheduled for the evenings). Each employee would have his/her own room and arrive on a luxury motor coach from the company office.

The HR Director approved the final plan and provided the balance of payment due. RCRU double- and triple-checked the plan before reconfirming the venue, rental of the challenge course facility, catered meals, and accommodations. The company scheduled and paid for the luxury motor coach separate from the RCRU contract.

A REDIRECTION program of "wilderness expeditions" was available for court-referred youth as an alternative to incarceration and with the intent of reducing dysfunctional behaviors such as substance abuse, status offenses, or property crimes. *Because this was a private program, and because clients were not consulted on their desires and the customer wish list dictated the program, no discrepancies between needs were noted, and refining the program purpose, goals and objectives was not necessary. However, L.E.T.S. Plan criteria that staff created included concerns for security and special treatment demands. They planned greater vigilance to prevent runaways, with added rules for contact between clients and the outside world, and they agreed to ongoing consultation among field and base camp staff regarding client treatment with the completion of written treatment plans.*

"Hoods in the Woods Limited" (HWL) recommitted its desire for a program plan of multiple activities and novel events conducted from a wilderness base camp and presented using isomorphic introductions with an underlying treatment agenda. It planned a series of expeditions (caving, navigation, soloing, and kayaking), with time in base camp between trips for preparation, resupply, cleaning, cooking, packing, additional activities with debriefing, and meetings with supervising psychologists. The expeditionary model was not so much about traveling through the wilderness as it was about journeying through life. Caving, navigating, soloing, and kayaking were specifically chosen for their metaphoric connection with discomfort, decision making, contemplation, and renewal, respectively. Field locations were selected for security, range of difficulties, high accessibility, low environmental fragility, proximity to base camp, and distance from civilization.

Youths would be expected to participate in many different groups. A single large group would operate at base camp and cave together, while several smaller groups would navigate and kayak independently in the wilderness, and individuals would solo alone. Assignment to *varying groups would be made on the basis of diagnostic findings and continuing treatment plans. Except for solo, which would have several specialized supervising staff, each group would have at least two professional therapists and two outdoor leaders working in partnership. Base camp would supplement this with support staff and psychologists who could substitute for primary field staff on an occasional basis. This arrangement would permit each set of staff to have some rest and downtime, as well as participate in treatment meetings, while ensuring youths have continual supervision. HWL staff were recruited for their ability to work with adjudicated youth and trained in delivering all components of the program.*

HWL was entirely self-contained by supplying all personal, program, and specialized equipment that was purchased in advance and couriered to the wilderness base camp: a remote and abandoned logging operation leased long-term from the forest service and upgraded to meet federal and state health and security standards. HWL constructed a challenge course, equipment building, and waterfront facilities.

HWL support staff managed equipment and food, but the youths were accountable for using and maintaining equipment and cooking their own meals on stoves in base camp, and over fires in the wilderness, after they had demonstrated their readiness to do both. When in the field, the youths slept in tents; while in base camp, they slept in bunkhouses with adjacent toilets/showers. HWL has two old school buses that were retrofitted to carry equipment as well as people. Field communications were accomplished by satellite phone and the base camp had land lines. An excellent relationship existed between HWL and local law enforcement and search and rescue services.

After double- and triple-checking the final plan, HWL received approval and the balance of startup funds from the judicial system and began operations shortly afterward. Operational funding was transferred quarterly to its bank from the judicial system.

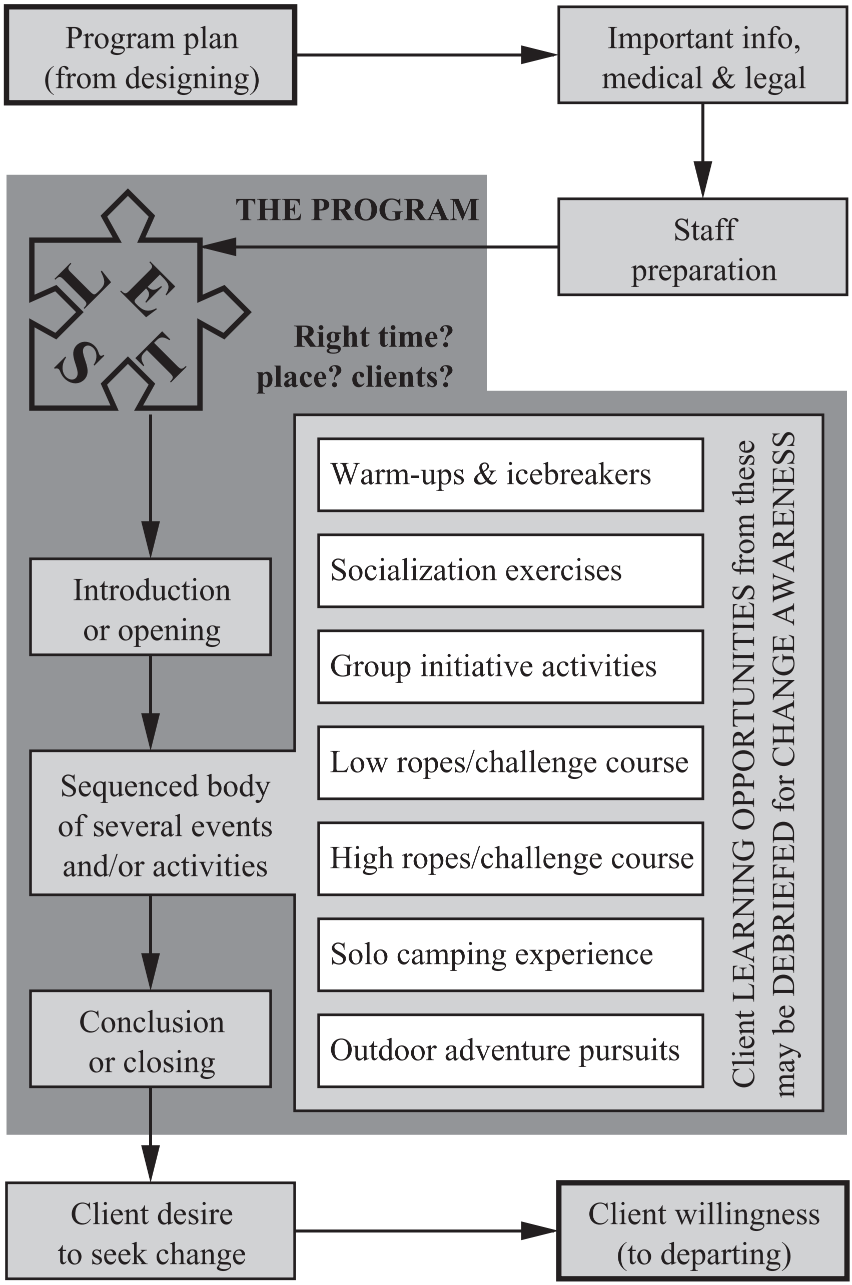


Figure 8: Steps in the DELIVERING phase

6
Delivering

Delivering involves presenting the program as planned in the design phase (with introduction, body of events, and conclusion) while remaining flexible and changing parts of the program as necessary.

In advance, clients should receive **important information** about the program. This includes an itinerary, equipment list (with suitable clothing and appropriate footwear), directions to reach the venue, and relevant descriptions of activities or events.

At this time, clients also complete medical and legal **forms**, unless they did so earlier. **Medical** forms vary, but should include personal information such as client name, contact information, height, weight, blood type, insurance information, emergency contacts, family contacts, physician contact, medical history, and current medical or related conditions. **Legal** forms may include combinations of the following clauses: acknowledgement and assumption of risk, insurance certification, covenant not to sue, waiver of rights, liability release, indemnification, severability, and jurisdiction. While these clauses may sound similar, they are different and very necessary parts of a strong exculpatory agreement.

Some programs use group versions of these forms, while others require individual clients to complete all forms. In any case, staff should be expected to verbally explain the basic content of legal forms before clients sign. Be aware that the law affords children additional rights and that parents cannot sign away their child's rights. Parents who act on behalf of their children do not exempt an organization from duty of care owed to those children. In addition, federal, state, and local legislation may differ, and organizations must act according to the appropriate jurisdiction for where the program takes place and/or supplier offices are located. Medical and legal advice from professionals is advised to create and use these forms.

Staff preparation before the program begins includes: checking equipment, props, supplies, vehicles, rooms, and other facilities; perhaps conducting a dry run of activities or an event rehearsal; and reviewing site information, emergency procedures, or instructional techniques for certain activities. Some staff may have additional preparation responsibilities related to getting food ready, registering clients, and setting up or taking down activities or events. Other minor roles for staff can include photographer, errand runner, gear manager, customer liaison, or driver. Remember to allocate time and resources for all staff roles and responsibilities.

Aside from medical and legal form completion and staff preparation prior to the program day, primary L.E.T.S. Plan concerns during delivery involve making certain that all necessary support is in place for the program introduction, body, and conclusion. This suggests that staff, equipment, and other materials are in place for activities and events, and that all subcontracting is ready, such as venue, facilities, catering, accommodation, and transportation.

The program **introduction** or opening usually takes place with the entire group of clients, perhaps before they are arranged into small groups. This is the time to confirm client expectations (from their answers to the miracle questions), overview the program schedule, outline goals and guidelines, frame the main events or activities, review housekeeping details, and clarify any questions clients have about forms or program philosophy. Conversations about confidential information should take place away from the group, between the client and designated staff members. Sometimes clients are introduced to equipment or taught skills during an introduction, while other program designs incorporate instruction throughout delivery.

A **body of events and activities** forms the bulk of the program. These events and activities were selected and sequenced during the design phase, but flexible programming leaves room for changing the plan as needed. **Facilitation** or debriefing may take place before, during, and/or after these events and activities, according to the guidelines in the next chapter. Therefore, the debriefing phase can be thought of as nesting within the delivering phase, especially when more than one activity or event makes up the program.

Participation in events and activities should generate learning opportunities. Appropriate debriefing of these learning opportunities can lead to an understanding of change and an awareness of the need to change. **Change awareness** can ultimately turn into a willingness to change and then a commitment to change, if facilitated properly during the debriefing phase and/or the conclusion step of delivery.

When delivering events and activities, always consider whether each is right for the time, place and client group. Client diagnosis is continuous, and decisions about events and activities in planning are often modified during delivery. For example, a group-building activity early in the program provides good information about group work and individual behavior within a group. If the basic activity is too easy to provide good information, it can be modified in the moment to be more difficult by changing the rules, adding obstacles, or assigning individuals different responsibilities and roles. If an event or activity isn't working, skip it, modify it, or replace it with a more appropriate one.

Ask: "*Is the timing right*?" Consider the season, weather, time of day, and client factors related to timing, such as energy level and expectations. Heat, cold, and rain may change timing. Some events and activities are better suited than others to certain climates, times of day, or locations. For example, riskier activities should probably be conducted early on, when staff and clients are fresh for the day, or the availability of water may dictate how far a group travels on a particular day.

Ask: "*Is this the right place*?" Consider whether activities and events are appropriately held indoors or outdoors. Sensory distractions such as noise, smells, and sights may present possible interruptions that could interfere with the experience.

Ask: "*Are the clients ready*?" Consider their fatigue levels, nourishment, and body temperatures. Clients who are too tired or energetic, too thirsty or hungry, or too hot or cold will not react optimally to an experience. Learning and change from participating in the experiential program will be compromised if clients are not fully engaged.

Each event or activity will have a frame or thematic introduction and instructional components, such as explanations of rules, safety briefings, and equipment use. Risk management and adherence to other policy requirements are ongoing considerations for program delivery. Staff should discuss in advance and throughout the program how these aspects of program delivery will be managed.

The program **conclusion** or closing brings everyone together again as a large group to summarize the program and celebrate success. In the summary, ask questions such as: "*What is the most important lesson you learned? How is that relevant in your life? How will you change as a result?*" To celebrate, have clients share their impressions of the program with everyone. This is also the time to revisit expectations (were the miracle questions met?) and guide feedback between or among clients (directly or anonymously through a third party). The conclusion or closing naturally leads into the departure phase, but additional debriefing may also be appropriate in some circumstances.

CASES (delivering)

A RECREATION program called "weekend adventures" offered open enrollment opportunities with the intent of learning new skills, getting fit, and making friends. *Prior to the program, the "City Parks & Recreation Office" (CPRO) provided the American Canoe Association (ACA) instructors with a registration list of families and copies of their completed medical and legal forms. The originals were placed in a program file at the CPRO offices. Extra blank forms were made available for those families who had not yet submitted them. In program preparation, ACA instructors inspected equipment and the site, set up practice stations, reviewed training curriculum and ACA forms, and adjusted their program plans for the day based on family medical information and local conditions.*

On the program day, ACA instructors took turns greeting the families and making sure all forms were completed. They briefly reviewed the highlights of the legal forms and distributed equipment. They overviewed the day, discussed expectations and concerns, briefed about risks and safety, explained the setup of stations, and mentioned other housekeeping items like what to take on the afternoon trip.

The program day continued as planned, with a water safety talk and a swim test, followed by a discussion on equipment use and abuse. Paddle instruction included standing, forward, reverse, sweep, draw, pry, push away, and steering strokes to maneuver the canoe. Once strokes had been learned, they were honed at the practice stations and in a game of canoe hockey. During lunch, families and staff reviewed maps and decided where to go for the afternoon trip.

On return from the trip, families cleaned up the area and put away equipment. In celebration, ACA instructors asked families to share their highlight of the day and asked whether they would go canoeing again. At the end of the program, everyone gathered in a nearby pavilion to finish with some final departure items.

An EDUCATION program called "incoming orientation" was open to any first-year university student interested in achieving successful transition into college life from high school. *Prior to the program, the "University Outdoor Center" (UOC) placed all medical and legal forms into a program file and gave copies to the UOC staff. In preparation for the week, UOC staff reviewed this information and made a few minor changes in the program design. They purchased, prepared, and packed trip food and supplies. They reviewed the detailed trip route and risk management plans, then phoned land managers for any recent trail updates and obtained weather forecasts. Staff inspected and organized equipment and vehicles. Lastly, they phoned the rafting and climbing subcontractors to make sure everything was ready for the last day of the program.*

On the first day, UOC staff greeted students and their parents, and helped students get into their program groups. Once in groups, staff teams introduced themselves, explained the program, and attended to housekeeping items, such as meal cards and room arrangements. At the end of the introduction, students said goodbye to their parents and proceeded to a campus tour scavenger hunt and debriefed group activities like blindfolded tent pitching and behavioral contracting.

Students prepared for the backpacking trip on the first evening and left early the next morning. The trip included hiking, camping, cooking, and living outdoors. Debriefing during meals focused on problem solving, decision making, and judgment, while evening discussions explained university support services. On the last day, students went climbing or rafting and were facilitated in an atmosphere of trust and support while taking perceived risks.

On the last evening, the program wrapped up back on campus with a celebratory awards banquet. Students shared personal highlights and insights. Groups presented skits to the larger audience. On the final morning, students gathered once more as a group to complete some final departure activities and then reunited with their parents.

A DEVELOPMENT program of "team-building" events was planned by a corporation with the intent of increased cooperation, enhanced trust, and improved communication among its co-workers, who were organized into multiple intact groups. *Prior to the program, "Ropes Courses R Us" (RCRU) received all legal and medical forms and forwarded copies to staff. Staff screened the forms for any concerns that might prevent full participation and made modifications to the program design as needed. In preparation for group initiative activities, RCRU staff gathered props and drinks, set up the stations, and safety-checked facilities. In preparation for the challenge course event, RCRU staff gathered to lay out equipment, set up the ground school and other course elements, and safety-check the course and equipment. Before the program began, staff met to discuss facilitation strategies, responsibilities, and roles.*

At the program beginning, RCRU staff facilitated introductions, overviewed the program, explained goals and objectives, discussed levels of participation or rules for engagement, and addressed housekeeping items, such as breaks, restrooms, meals and housing.

During the program, staff presented, supervised, and facilitated a sequenced combination of group initiative activities and a challenge course event tailored to suit each team. The initiative activities increased cooperation, enhanced trust, improved communication and built an effective team. The challenge course encouraged individuals to take risks with support from a newly cohesive team. Employees belayed one another on the challenge course.

At the end of the program, RCRU staff asked employees to summarize their most important learnings and their willingness to change by drawing murals and explaining their program experiences. A final party celebrated the team success of employees that evening and led into some final departure items on the last morning.

A REDIRECTION program of "wilderness expeditions" was available for court-referred youth as an alternative to incarceration and with the intent of reducing dysfunctional behaviors such as substance abuse, status offenses, or property crimes. *Prior to the program, "Hoods in the Woods Limited" (HWL) received legal transfers and case files from the judicial system. HWL staff continually referred to the files in designing, delivering, and debriefing the program. In preparation for this multi-event program, support staff looked after food, equipment, housing, and transportation. Program staff met as treatment teams to discuss case files and possible approaches for each youth, and to ready for the arrival of youths by setting up for each specific activity, location, and client.*

At the start of the program, HWL staff met the youths on arrival, assigned them to groups and cabins, and issued equipment and clothing. While youths received medical exams from a physician and intake assessment from a psychologist, staff organized the youths' personal belongings and removed any contraband. After having established a climate of "tough love" and discipline, staff took youths on a base camp tour and explained chores and duties.

During the 32-day program, youths participated in caving, navigating, soloing, and kayaking, with returns to base camp in between to clean up and prep for the next trip, while also meeting with the psychologist and participating in more group development activities. All events were progressively sequenced and debriefed to achieve treatment goals.

At the program end, parents attended the graduation day, where youths demonstrated the skills they had learned and discussed the changes they had made. Parents met with the treatment teams, and a picnic lunch, certificates, and slide show capped the day. Before leaving with their parents, youths finished up with departure items.

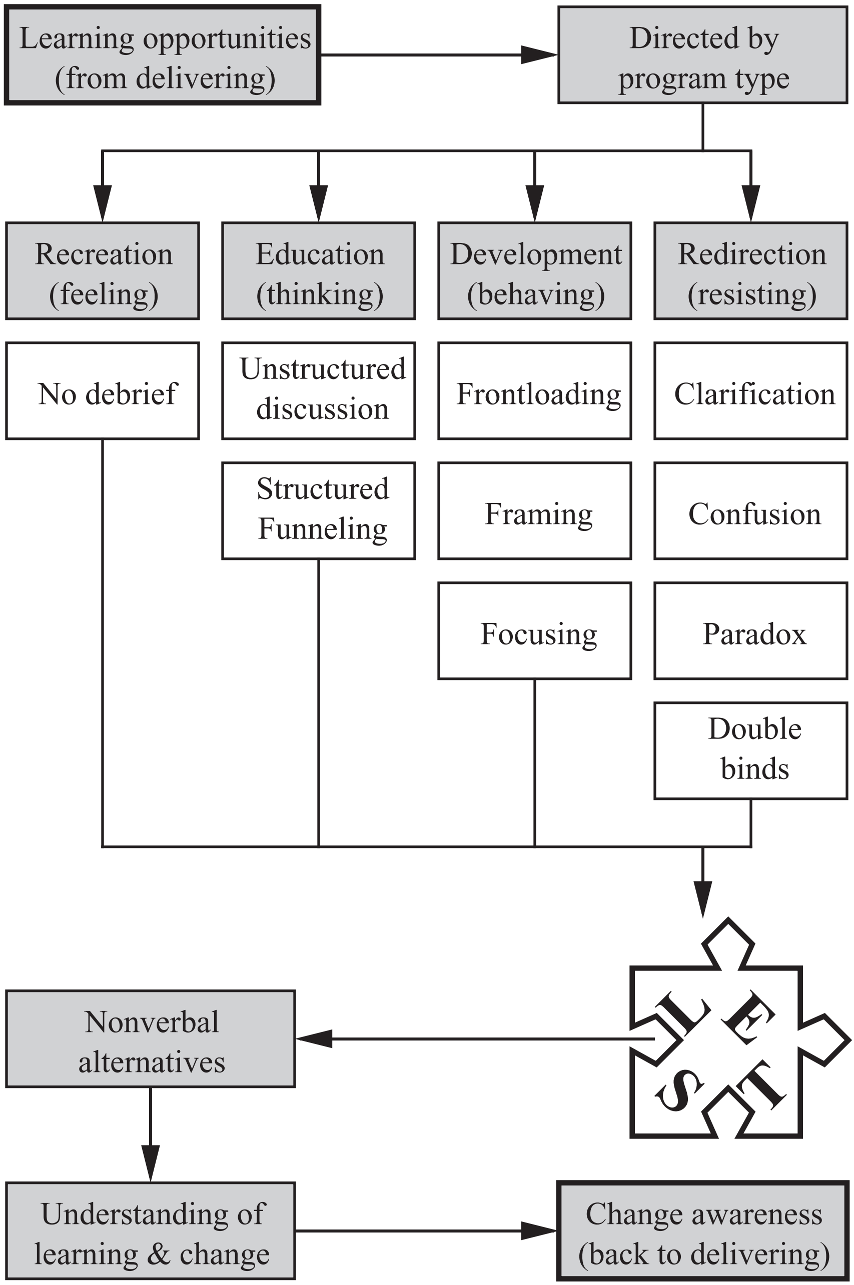


Figure 9: Steps in the DEBRIEFING phase

7
Debriefing

Debriefing discussions, or nonverbal alternatives (depending on the type of program delivered), are where the reflection, integration, or continuation steps of the experiential learning cycle take place.

As with diagnosis, the depth of debriefing depends on the type of program as summarized in Figure 9. Many facilitation styles and strategies exist, and some are better suited than others to certain types of programs. A few are discussed here to highlight that point. For more detail, consult "The Essential Elements of Facilitation" (Priest, Gass & Gillis, 2000).

In recreation programs, where feeling is changed, **no formal debrief** is necessary, because the program is inherently enjoyable enough to evoke emotions without formal facilitation. At the most, staff may simply ask "*How was the program?*" as a means to check in with clients and solicit information about changes in feelings.

Educational programs intend to change thinking, and **debriefing** is helpful to do this. Debriefing may be a group or individual dialogue among staff facilitators and clients. Facilitators ask questions and guide the dialogue, but avoid making statements or providing answers. Methods of debriefing can range from unstructured discussion through Gestalt questioning to structured funneling.

Unstructured discussions ramble around and go off on tangents. They are effective for exploring learning, but not direct enough to confirm changes in thinking. Gestalt questioning consists of asking three simple questions that can be structured to focus on program goals or objectives: "*WHAT happened today? SO WHAT did you learn? NOW WHAT will you do?*"

Structured funneling expands the three Gestalt questions into six sophisticated filters of information. Funneling is very effective for exploring learning and confirming change, as well as discovering new issues. The six filters are:

- REVIEW significant content;
- REMEMBER critical incidents;
- IDENTIFY IMPACT on group & goals;
- SUM UP lessons learned;
- APPLY to daily life; and
- COMMIT to making a difference.

To change behavior in development programs, basic debriefing is not enough. Additional behavioral change is likely to be more significant if **intermediate** facilitation strategies, such as frontloading, framing, and focusing, are combined with the basic debriefing strategies noted previously. Intermediate facilitation strategies are powerful for modifying client behavior in respectful ways.

Frontloading involves asking short punctuated questions before the experience (instead of after, as with basic debriefing). This promotes change during the experience rather than afterwards. Five prebriefing techniques are: revisit commitments, applied motivation, learn lessons, enhance function, and avoid dysfunction.

Framing is a manner in which activities or events can be introduced to make them more meaningful and relevant. Four kinds of frameworks that are typically used are: fantasy, reality, contextual, and isomorphic (the use of a precise metaphor, as predetermined from diagnosis, to enhance the transfer of learning).

Focusing means interrupting and recentering clients by halting actions and asking a single question that focuses them on the issue at hand. Such issues can vary from safety concerns through teachable moments to repeated mistakes.

Redirection programs aim to change resistance using **advanced** facilitation strategies. One set of advanced strategies includes the sophisticated psychotherapeutic methods of clarification technique, confusion technique, paradox, and double binds. All of these powerful techniques must be done with sincerity and in the clients' best interests by trained professionals. Otherwise, you may do more harm than good. Practice and supervision with these psychotherapeutic techniques is strongly recommended.

Clarification technique is used when a client is uninformed about what is going on. Rather than the facilitator explaining the situation, other clients are encouraged to clarify it, thus maintaining facilitator neutrality and objectivity.

Confusion technique is used when unconsciously opposing clients are resisting change. The facilitator acts genuinely confused and asks the client to help him/her understand what is going on. No matter what the client response, the facilitator remains confused in an effort to have the client re-examine the situation from several perspectives in order to help the facilitator understand.

A **paradox** is when seemingly contradictory information is used with consciously opposing clients. The illusion of alternatives, symptom prescription, reverse psychology, and proactive reframing are a few examples of paradox.

Double binds are a pair of restrictive options used as a last resort with clients in denial. These often force clients to choose between win-win, win-lose, and lose-lose options.

Not all debriefs are verbal; several **nonverbal alternatives** can be effective at overcoming language barriers or expressive concerns and can easily segue into verbal debriefs. They include, but are not limited to, art, drama, writing, photography, and reading.

Lastly, the model of facilitation shared here has relevance to the design and delivery phases. When selecting and utilizing staff, be aware of facilitation strengths and weaknesses. Placing highly competent staff in recreation or education programs may bore them or overwhelm clients. Similarly, novice facilitators in development or redirection programs can make staff apprehensive and fail to meet client needs. Be certain to match staff abilities to program types and encourage staff to develop their facilitation skills to suit the programs in which they work. A more thorough treatment of these topics is found in "The Essential Elements of Facilitation" (Priest, Gass & Gillis, 2000).

Ultimately, apply facilitation techniques sparingly. Do not rely solely on one method, and consider the value and consequences of applying simpler techniques in more complex programs, but not vice versa, as this can exceed contracted purposes. The use of debriefing and other forms of facilitation are normally directed at the latter stages of the experiential cycle: reflection on lessons, integration of learning, and continuation of change. When these stages of the experiential cycle are well addressed, clients can begin the departure phase.

CASES (debriefing)

A RECREATION program called "weekend adventures" offered open enrollment opportunities with the intent of learning new skills, getting fit, and making friends. *The "City Parks & Recreation Office" (CPRO) staff were acting informally facilitative by asking how families were doing, whether they were having fun, and if they needed help with instruction. However, CPRO staff were not formally facilitating any kind of debrief or discussion, because the intent of a recreation program was to change feelings, and the inherent joy of canoeing made people feel good. The other program purposes, goals, and objectives of learning new skills, getting fit, and making new friends also happened without formal facilitation.*

An EDUCATION program called "incoming orientation" was open to any first-year university student interested in achieving successful transition into college life from high school. *The "University Outdoor Center" (UOC) staff held group debriefing discussions after each activity on the first group development day, during each meal on the three-day backpacking trip, and after the final outdoor adventure day. The discussions began with unstructured sharing about being away from home and early impressions of life on campus. Topics progressed toward the challenges associated with taking large course loads, working two jobs, and partying heavily. Debriefing ended with structured questions about what students were learning, how those lessons applied to university life, and what they would do differently in order to succeed in school. The shared discussion among students allowed them to see other perspectives, to hear strategies that might work for them, and to not feel alone in their predicaments. By the end of later debriefs, students were offering support to one another and making plans to get together back on campus to continue their support as a group.*

A DEVELOPMENT program of "team-building" events was planned by a corporation with the intent of increased cooperation, enhanced trust, and improved communication among its co-workers, who were organized into multiple intact groups. *In addition to the usual debriefs held after each event focused on trust, cooperation, and communication, the "Ropes Courses R Us" (RCRU) staff also introduced events with strong frontloading questions and contextual frames. Rather than introducing activities in real terms, RCRU staff described general business analogies that fit employees well. Before beginning an activity, workers were asked to consider what they promised from the last activity, and what they would need to succeed or avoid failure. Their answers helped direct their energies, until at one point, the group appeared to be faltering. RCRU staff called a "timeout" and asked a single question that focused them on what they were doing. When the action restarted, members changed their behavior, and all pulled together as a team.*

A REDIRECTION program of "wilderness expeditions" was available for court-referred youth as an alternative to incarceration and with the intent of reducing dysfunctional behaviors such as substance abuse, status offenses, or property crimes. *In addition to using the basic and intermediate facilitation techniques described above, trained therapists from "Hoods in the Woods Limited" (HWL) used some very advanced psychotherapeutic techniques with their more resistant youth. HWL staff appeared to be presenting very little help during activities. Instead, they wanted youths to fend for themselves. In discussions, staff always seemed confused, and when asked a question by a youth, they deferred to other youths for the answers. This was all part of a staff plan to avoid creating client dependency on staff. HWL staff also presented a lot of choices for the youths. Sometimes, the choice was an illusion; at other times, the choice was a tough decision that forced youths to face up to their negative behaviors and resistance. At all times, HWL staff worked with sensitivity and respect for this very difficult client group.*

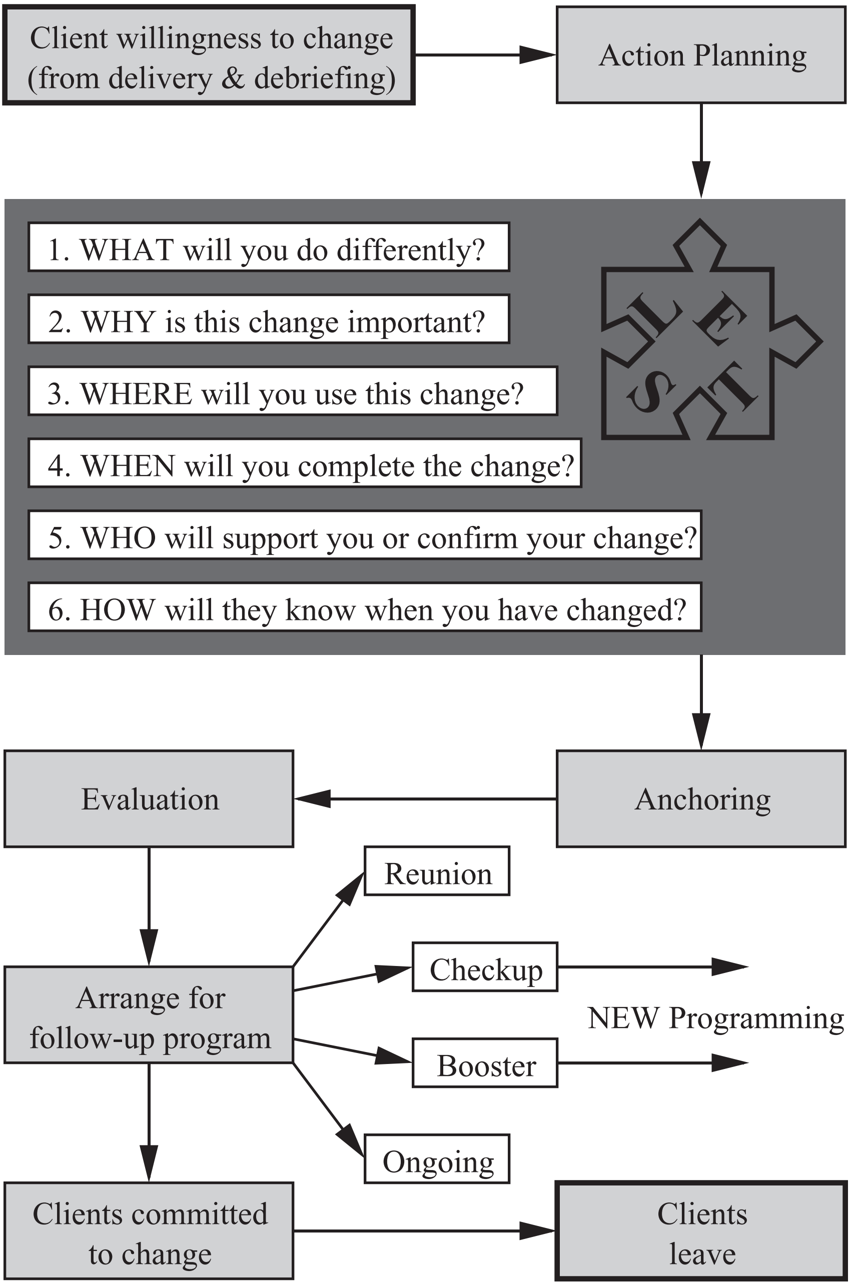


Figure 10: Steps in the DEPARTING Phase

8
Departing

Departing means that clients will leave the program after writing action plans, completing evaluations, receiving anchored souvenirs, and scheduling an optional follow-up (checkup or booster) session.

Action planning keeps clients linked with the learning and change that results from an experiential program. A written action plan, with reminder copies sent to clients some time later, can follow after the last debrief or the delivery conclusion. In some cases, action plans are negotiated among group members, with partners designated to check in. In other cases, programs encourage or require clients or facilitators to record action steps throughout a program in client journals or facilitator notebooks. Some action plans can be extremely detailed, identifying the change goal, resources needed, and strategies to be used for implementing plans and monitoring success. Others can be as simple as sharing intent with the group. At a minimum, ask clients to answer these six questions:

- WHAT will you do differently?
- WHY is this change important?
- WHERE will you use this change?
- WHEN will you complete the change?
- WHO will support you or confirm your change?
- HOW will they know when you have changed?

Anchoring maintains client connections to the program by giving them something that will remind them of the experience. Mementos, awards, or souvenirs can be: manufactured merchandise with program, provider, customer, and client logos on them; personally made treasures from natural materials collected in an environmentally sensitive manner; or certificates and letters the group has created for its members. Such reminders return clients to the experience at times when perhaps they may need support or inspiration for working on changes.

During an **evaluation**, clients and the customer give a personal or group opinion about the worth of a program. They commonly fill out a form that registers their level of satisfaction for a number of program elements, such as staff, location, schedule, timing, safety, security, venue, facilities, accommodations, catering, transportation, and communication. Clients often comment on the best and worst aspects of those elements and provide recommendations for changing the program in the future. Evaluation strategies and instruments can be tailored to a specific program, generalized to fit a range of programs offered by an organization, or a combination of both. In any case, good program evaluation is valuable, and many suppliers seek assistance from evaluation specialists in creating forms.

L.E.T.S. Plan logistical concerns for departure are having the necessary props, supplies, and tools on hand to enable smooth action planning, evaluation, and anchoring, and having access to an appropriate, comfortable place to conduct departure events. In some cases, different staff may supervise ceremonial events or evaluation procedures, and those responsibilities will need to be planned.

All client learning and change will NOT be achieved by a single program, so **follow-up** sessions can be useful in addressing unresolved issues or further cementing positive learning or change.

Follow-up sessions are separate programs that may or may not be included in the original contract, and always require that the 5D Process be used again from the beginning. They come in two forms: checkups or boosters. **Checkups** are short meetings to update the progress of client action plans. **Boosters** are small stand-alone programs that include a checkup meeting, but also add activities or events to relive or revisit gains from the original program. Sometimes, follow-up programs lead to new contracts focused on different purposes.

The type of program and type of follow-up are directly related. Recreation programs typically have **reunions** as a follow-up to the main program. Education programs and development programs use checkups and boosters respectively as discussed above. Redirection programs ideally include **ongoing** follow-up and reporting with continual support programming.

Lastly, clients leave, and the supplier begins the process of wrapping up the program. Evaluation data from several sources are held for use in the improving phase. Improvements will be used in the future for similar or different programs with similar or different clients, and may also prove useful for follow-up programming with the same client group.

CASES (departing)

A RECREATION program called "weekend adventures" offered open enrollment opportunities with the intent of learning new skills, getting fit, and making friends. *The "City Parks & Recreation Office" (CPRO) and American Canoe Association (ACA) instructors shared information with families about local canoe clubs and opportunities for further training. Families verbally described how they intended to use the skills they had learned in the future. They received an ACA training card as an anchor memory to the program, and as new ACA members would receive newsletters in the future. Families also completed a standard CPRO evaluation form that invited feedback about the program. The group decided to plan its own paddling reunion, and then the ACA instructors thanked everyone for participating and waved goodbye.*

An EDUCATION program called "incoming orientation" was open to any first-year university student interested in achieving successful transition into college life from high school. *The "University Outdoor Center" (UOC) gave each student a resource packet of campus support services, clubs, and annual student events. In trip groups, the students wrote statements about their strategies for surviving first year. The action plans detailed what, why, where, when, who, and how. Copies were made for each student, and they pledged to support one another in the future. Students received several anchors: a banquet award, a group photo, and their names engraved on a plaque to be hung in the student union. With their newly assigned computer user accounts, students logged on and completed a Web form evaluation before leaving with their parents. UOC staff checked up on each student in their group several times over the next few months, aside from the reunions planned by the students. Retention data on the students were kept by the admissions office.*

A DEVELOPMENT program of "team-building" events was planned by a corporation with the intent of increased cooperation, enhanced trust, and improved communication among its co-workers, who were organized into multiple intact groups. *"Ropes Courses R Us" (RCRU) provided action-planning forms in triplicate for individual employees to write their change commitments. Copies were given to the employee, the group, and RCRU staff (who mailed them as a reminder several months later). Each employee received an anchoring plaque with his/her name and a photo of the group's mural from the program closure. They completed an optically scanned evaluation form that rated several components of the program and ranked the changes they experienced as a result of the program. Before getting on the bus to head home, employees were reminded of the scheduled booster follow-up back at the office, where they would review their progress on action plans, their maintenance of teamwork, and their need for further training and development.*

A REDIRECTION program of "wilderness expeditions" was available for court-referred youth as an alternative to incarceration and with the intent of reducing dysfunctional behaviors such as substance abuse, status offenses, or property crimes. *"Hoods in the Woods Limited" (HWL) provided each parent with information about support services and contacts in their home communities. The youths met to plan future actions, and those action plans became part of their permanent case files, along with the treatment team recommendations for each youth. Upon graduation, each youth received a T-shirt and certificate of program completion. HWL staff presented each youth with a memento that was homemade from natural materials. As part of the final meeting between each youth and his/her treatment team, youths were asked for feedback to evaluate the program. Parents were later sent an evaluation form in the mail. The judicial system was responsible for pre- and post-testing of youths and for tracking recidivism after the program. Case files were returned to the judicial system for ongoing treatment supervision.*

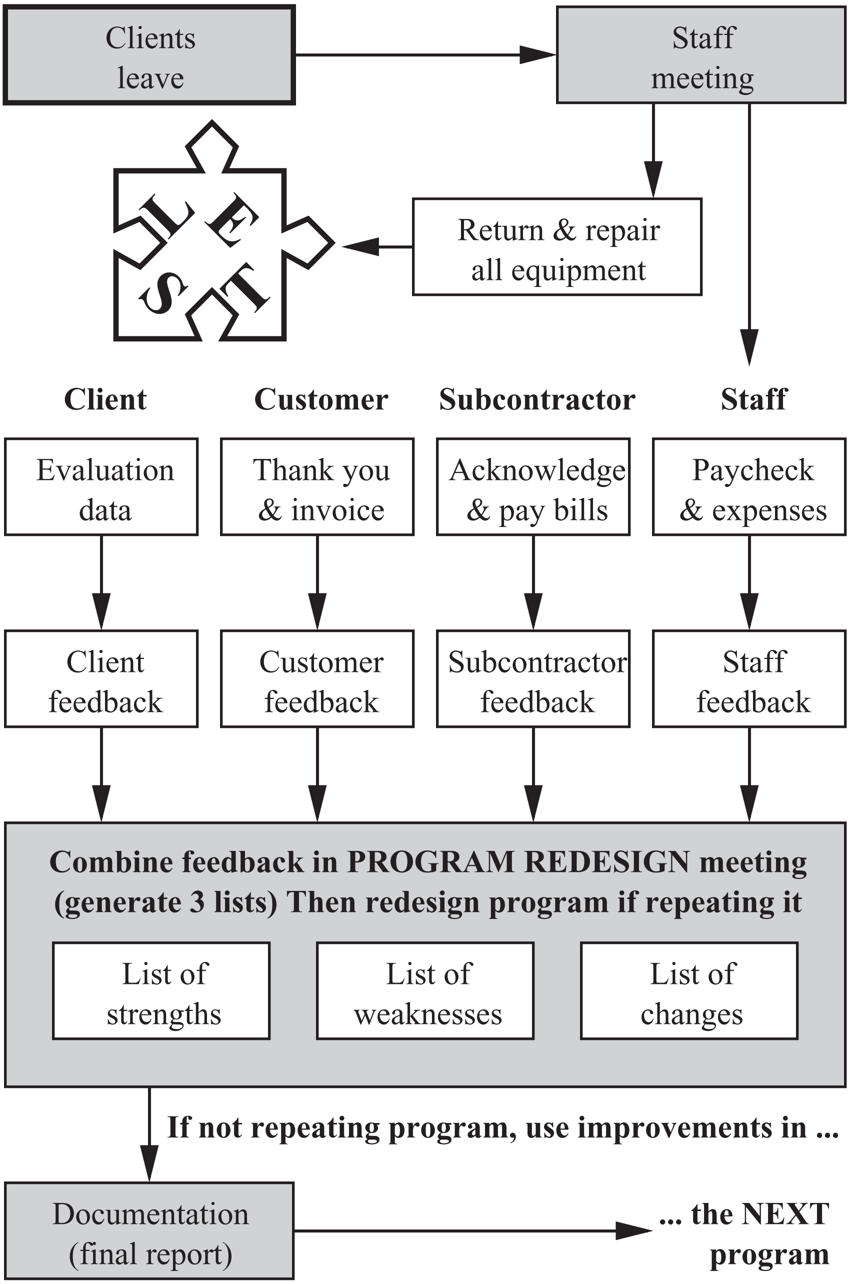


Figure 11: Steps in the IMPROVING phase

9
Improving

Improving relies on receiving and using detailed feedback about program and related service quality from stakeholders (customers, clients, community, subcontractors, suppliers, staff, and profession).

Staying in business and enjoying sustainable growth depends on improving program quality. The key to making improvements is getting **feedback** from more than just client evaluation forms. Hold a post-program staff meeting, talk to the customers, and seek input or ideas from any subcontractors.

In the **staff meeting**, ask for improvement suggestions: "*what went well, what didn't, and what needs changing*?" After the meeting, staff can inventory, clean and repair the equipment. Then, before they leave, they can get their paychecks and/or submit their expense reports for reimbursement. Staff may also immediately begin working on improvements in areas, such as equipment management and gathering needed information for site files and vendor alternatives.

Send **thank-you notes** to the clients and/or customers. Prior to invoicing the customers for any last-minute program changes, take time to get their feedback on the pros and cons, and program changes they would like to see. Many times, customers are interested in repeating the program with a new group of clients, so they welcome the opportunity to help improve the program.

Acknowledge subcontractor contributions, such as nonsalaried staff, third-party vendors, or support-service providers with gifts or thank-you notes. Ask them what they liked, disliked, and would change next time. Pay all bills for venue, facilities, accommodation, catering, transportation, and equipment in a timely manner.

Once feedback has been gathered from all sources, sit down with the **program design team**, and anyone else involved in the planning process, to discuss how to improve the program. Organize the collective feedback from clients, customers, subcontractors, and staff into three lists of strengths, weaknesses and changes. Discuss each list separately and again in combination. Determine how to make changes and improve weaknesses, without compromising strengths. **Redesign this program** if it is to be repeated; otherwise, apply the insights gained from this process to future programs of a similar nature or to those with similar clients.

The final step of this last phase is **documentation**. Complete paperwork needed for annual or section reporting and forward it to the appropriate office or person. Archive confidential risk management documents such as incident or accident reports and legal or medical forms. Finalize and forward the last invoice for any overcharges or refunds.

Include L.E.T.S. Plan detail in the program file so that other staff could reproduce the program if asked to do so. Gather **final report** information, including a list of logistical resources and contact information, a list of staff and contact information, a list of activities and events that comprised the program, the program schedule, and any other pertinent data. Final report structure and content will depend on the specific policies and procedures of each supplier and any prior agreements made with the customer.

Information and how it is managed in this phase is an important indicator of high-quality programming and proves useful in certain legal situations. Some suppliers have procedures for circulating information about various program components, such as equipment maintenance, treatment plans, or site and route information, to the appropriate staff. At the very least, share the final report with any staff who might be able to use the information in their program planning duties. Once the documentation is completed, you are ready to begin work on the next program!

CASES (improving)

A RECREATION program called "weekend adventures" offered open enrollment opportunities with the intent of learning new skills, getting fit, and making friends. *The two American Canoe Association (ACA) instructors reported equipment malfunctions and program difficulties to the "City Parks & Recreation Office" (CPRO) and the local canoe outfitter. CPRO sent thank-you notes to each family, the ACA instructors, and the local outfitter. CPRO paid invoices from the ACA instructors and the outfitter. CPRO staff discussed pros, cons, and changes to the program at their yearly redesign meeting. Recommendations for the future were documented in the program file to be used for designing the next year's course.*

An EDUCATION program called "incoming orientation" was open to any first-year university student interested in achieving successful transition into college life from high school. *After the departure of students and their parents, the "University Outdoor Center" (UOC) staff met to discuss what went well and what didn't. They returned equipment to the UOC for repair and storage. They then cleaned up program areas. The UOC sent their thanks to land management agencies, third-party vendors for rafting and climbing, and volunteer staff, faculty, alumni, and graduated students. The university administration paid internal resources, while the UOC paid third-party vendors and settled credit card and staff expense reimbursements. The university administration and UOC met to discuss the program and renegotiate future programs. The UOC staff made several recommendations for program improvement, and the administration accepted the recommendations. Program files, including third-party contracts and route plans, were archived. A final report was written by staff and submitted to the UOC and university administrators.*

A DEVELOPMENT program of "team-building" events was planned by a corporation with the intent of increased cooperation, enhanced trust, and improved communication among its co-workers, who were organized into multiple intact groups. *After the bus left, "Ropes Courses R Us" (RCRU) staff cleaned up the program areas and returned all equipment. They met to discuss the program positives, negatives, and changes. After paying invoices and reimbursing staff expenses, RCRU sent thank-you notes to and requested feedback from the venue, catering, accommodations, and the customer. Because the corporation wanted to roll this program out to more employees, RCRU held a redesign meeting, where feedback from client evaluations, staff meetings, and other sources were combined. Although many recommendations would be applied to the next program for this customer, some suggestions also would prove useful with other customers in future programs. Documentation from the program files, including diagnostic data and evaluation feedback, were archived along with the final written report.*

A REDIRECTION program of "wilderness expeditions" was available for court-referred youth as an alternative to incarceration and with the intent of reducing dysfunctional behaviors such as substance abuse, status offenses, or property crimes. *After the youths left with their parents, "Hoods in the Woods Limited" (HWL) field and support staff met to discuss the strengths and weaknesses of the program in relation to the contract with the judicial system. Land managers and local community services were acknowledged for their support. Incidental staff expenses were reimbursed. HWL held a redesign meeting with input from the youths' final discussions, the parents' evaluation forms, the staff meeting, and judicial system representatives. Important minor recommendations were applied before the next program delivery, while other, less critical recommendations were incorporated into the next application for funding renewal. HWL documented and archived treatment team case files, program event files, contracts, permits, staff performance assessments, and the written final report.*

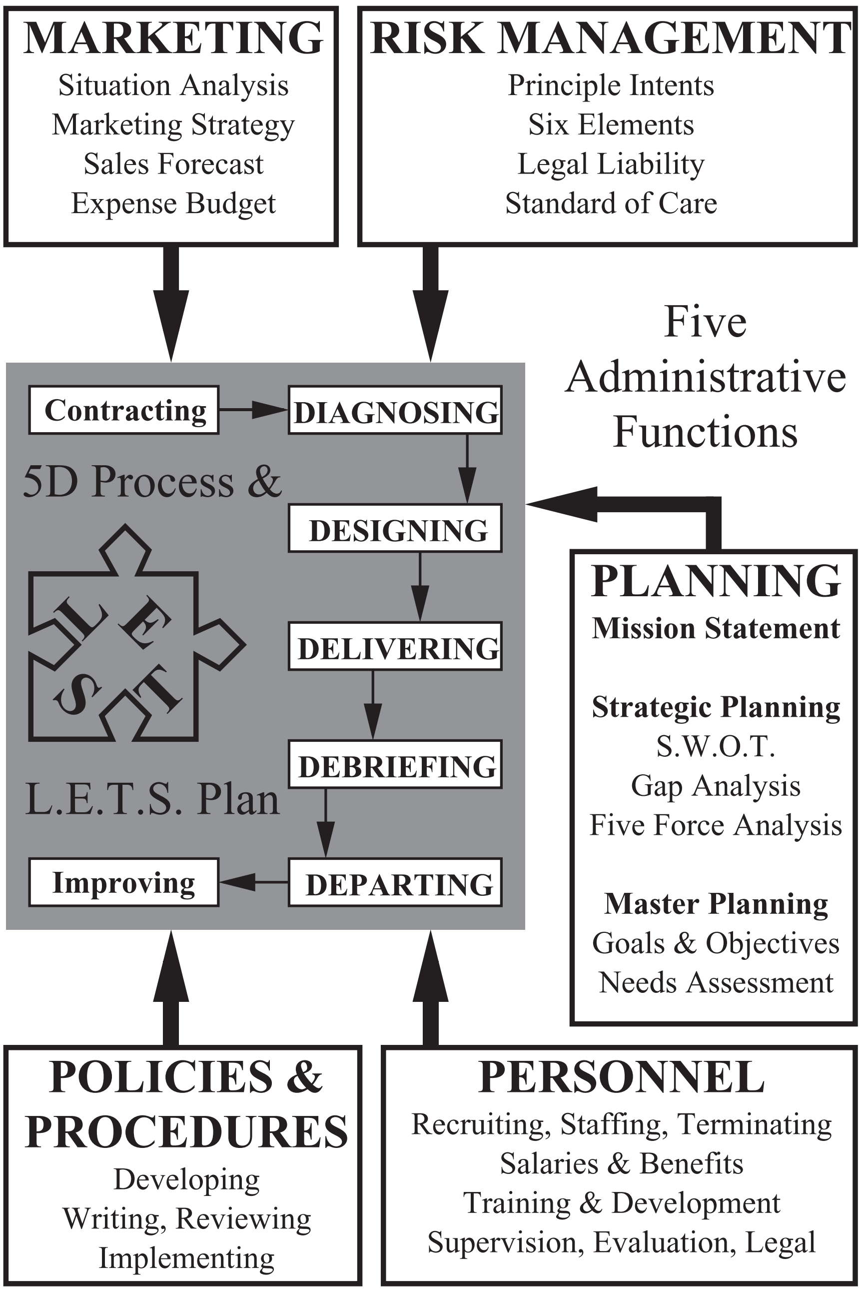


Figure 12: Five Administrative Functions

10
Administration

This chapter overviews selected administrative functions (shown in Figure 12) that relate to experiential programming, but are not direct elements of the 5D Process or L.E.T.S. Plan models. These overviews are not comprehensive in nature, but are intended to inform the reader about the depth and breadth of these administrative functions: **planning**, **marketing**, **risk management**, **policies & procedures**, and **personnel management**. Additional information for these topics is suggested in the Resource Appendix.

PLANNING

Aside from program planning, inherent in previous chapters, other wider functions of administrative planning are important. Central to these is a clearly defined mission for defining planning goals and assessing decisions made on behalf of an organization. A **mission statement** captures the organization's purpose, customer orientation and business philosophy. It clearly answers three questions: "*Who are we, who do we serve, and how do we serve?*"

With clarity of mission in place, planning (outside the program) can be managed for the future. Two major types worth discussing are **strategic planning** and **master planning**. These planning approaches vary according to outcomes sought and available resources. They may overlap in some areas and/or necessitate additional planning to support larger, more comprehensive goals. For example, a strategic plan may result in the need to restructure so cross-functional teams can carry out the objectives of the plan. A master plan may require resource managers to adopt an ecosystem perspective before developing site plans for meeting facilities or natural areas.

Strategic planning focuses on adaptability to change, flexibility, and the importance of strategic thinking combined with organizational learning. A strategic plan is created using several strategies: S.W.O.T. analysis, gap analysis, and/or five forces analysis.

The **S.W.O.T.** (Strengths, Weaknesses, Opportunities, and Threats) model is based on identifying internal strengths and weaknesses, in alignment with external opportunities and threats. It identifies factors that may affect the desired future outcomes of the organization, in consideration of societal and organizational values. Then, the organization creates a strategy to ensure the best alignment between the external environment and the internal situation. For example, an organization identifies its friendly nature and high-quality customer service as strengths and a lack of technological access to program information as a weakness. It sees the opportunity of a large market segment who must to travel great distances to obtain information or register for programs; and it sees the threat of competition from other providers with websites. It decides to invest in user-friendly technologies that enhance face to face services.

A **gap analysis** seeks to evaluate the difference or gap between the current position of the organization and where it wants to be, so that the organization may choose to focus on synergy that will close the gap. Synergy refers to the idea that products and market potential should be combined to create performance that is greater than the sum of its parts (Ansoff, 1965, in Mintzberg, p. 43-45). For example, an organization identifies the desire to increase its challenge course use by corporate clients, but it recognizes the gap of lacking a residential facility for hosting corporate events. By working with a local retreat center, a synergistic relationship is forged where the combination is greater than the individual potential of either the organization or the retreat center, and everyone wins (including customer and clients).

Five forces analysis (Porter, 1985) guides an organization in the analysis of its environment and the attractiveness of its programs and services. The five forces are: the risk of new competitors entering the industry, the threat of potential substitutes, the bargaining power of buyers, the bargaining power of suppliers, and the degree of rivalry between the existing competitors. The aim of the approach is to evaluate which of the factors contribute to, or take away from, the organization's overall attractiveness (Hax & Majluf, 1996, p. 27). The organization then chooses strategies that will alter the influence of those forces to its advantage. For example, an organization determines that a potential risk for new competition to its after-school program may be fostered by a federal initiative to keep at-risk youths in school. Potential substitutes for its existing service are seen to be other organizations that are able to integrate programs into the regular school curriculum by using that funding source to train teachers. The organization has expertise for training and grant writing, and rival competitors do not. The organization seeks to create a niche for itself among local schools by strategically positioning itself to offer services that contribute to sustainable and effective programs.

The examples of strategic planning processes offer the administrator mental models for ongoing analysis of internal and external information, decision making, and the day-to-day business of the organization. They are dynamic and must be assessed and revised continuously. In this way, experiential programmers are challenged to think creatively and take ownership for new and innovative approaches to programming, while recognizing the value of existing programs that contribute to the success of the organization and its mission.

Master planning is project- or goal-specific. In other words, master plans are created with specific ends in mind and provide the organization with a road map for achieving those ends. For example, the plan may focus on a combination of facilities and equipment, transportation and fund raising, or programs and services. Unlike the strategic plan that is dynamic and addresses the ongoing strategic positioning of the organization, the master plan has an endpoint that signals the completion of the plan and the need to develop a new master plan for different purposes, or a revised master plan to accomplish unattainable goals identified in the existing plan.

Master plans are a team effort. The **planning team** should be a diverse group of individuals who work well in a collaborative atmosphere. Professional consultants and representatives of the organization are typical resources utilized during the planning process. However, each team should be established with regard to ensuring appropriate representation and data access. Many a master plan has resulted in the loss of considerable fiscal resources, employee moral, and reputation because the planning team did not have access to good information on which to base its decisions.

Goals and objectives that are general and broad are established for the planning team. For example, the team may be asked to focus on a solution to facility-deterioration problems. As the team addresses the goal, objectives become measurable and quantifiable. An objective might be to analyze five and 10-year projected growth rates for the region the organization serves in order to determine whether facilities will accommodate an increase in client base. After defining goals and objectives, the team will outline tasks and establish timelines.

Needs assessment is the basis for master planning. The initial phase of the process should be devoted to researching existing conditions and identifying deficiencies. For example, a facilities-focused master plan might gather information such as fire marshal reports, asbestos studies, participation statistics, as-built plans, or aerial photographs. Architect/engineer surveys of existing sites and building conditions help identify facility deficiencies and needed improvements. User-group and maintenance staff interviews at each site will give further insight into facility use and hidden conditions, and existing and projected space-utilization information might be used to identify future needs. The existing bond debt, current and future bonding capacity, and any other construction funding considerations must be thoroughly researched. Finally, the master plan concept is developed, and constituents are invited to provide input. Like the strategic plan, the mission and guiding principles of the organization serve as a foundation for adoption and subsequent implementation.

Strategic plans and **master plans** tend to produce the need for additional plans that focus on specific elements and require specialized expertise. Common to organizations that focus on experiential programs are marketing, site development, equipment management, and risk management plans. Each implies a process that takes into account industry standards, legal issues, and a variety of specialized technical and conceptual considerations. For example, site planning might include the development of desired program concepts that will dictate how constructed and natural features are assessed, and how natural forces and aesthetic advantages influence planning decisions. Site plans may be influenced by landscape values that conflict with the organization's vision for how a site will contribute to experiential programs. Adjacent land uses may interfere with site aesthetics because natural forces carry smell or water pollutants to the site. An equipment management plan must comply with industry standards and fiscal abilities, and a marketing plan may price products out of reach regardless of the quality of promotional materials because a thorough feasibility study was not conducted.

Planning requires time and organizational commitment. Many experiential program organizations express frustration over the lack of time to do effective planning and a lack of knowledge about where to obtain expert assistance or resources to guide those processes.

MARKETING

Sales is the process of negotiation between initial inquiry and signed contract, as explained in the contracting phase. **Marketing** is the set of actions designed to positively influence the perceptions and choices of customers, so that they contact the provider to inquire about a program. Marketing is an essential part of organizational operations and often determines the success of an organization by identifying advantages in the marketplace.

A **marketing plan** is a written document containing descriptions and guidelines over a defined planning period for marketing tactics, products, and services (most likely programs, in this case). Every marketing plan is developed to meet the needs of the organization and is based on the unique situation in which the organization functions. Although developing a marketing plan can take several approaches, all include some version of these components: **situation analysis**, **marketing strategy**, **sales forecast**, and **expense budget**.

The **situation analysis** normally includes two components: a market analysis and a S.W.O.T. analysis. The **market analysis** is an assessment of market conditions relevant to understanding supply and demand dynamics for a specific organization and its products or services. Simply put, the market analysis is similar to a strategic plan gap analysis, only focused on what was expected to happen in the marketplace and what actually occurs.

This component of the situation analysis includes a market forecast, segmentation, customer information, and market needs analysis. While those terms may feel a little overwhelming, information in each category is often available from existing sources (federal, state, or regional data banks or consumer reports), and most organizations have formally or informally accumulated information about who their customers are, how they are segmented, and what they want and need. For example, a coastal county recreation department expected an increase in demand for coastal kayaking programs based on past trends and observations made by staff that population growth in its service area was increasing. The expectation did not materialize, and a market analysis based on actual data about population growth, together with information about seasonal climatic variance, and negative media coverage of a coastal kayaking accident in the region, helped them explain the gap. Understanding those dynamics in the market proved useful to staff for developing future marketing strategies for that product.

The marketing S.W.O.T. analysis focuses specifically on supply and demand dynamics. The organization identified two strengths in response to the coastal kayaking accident that seemed to influence the market analysis. The organization's risk management policies and procedures are accredited by the Association for Experiential Education and the organization has a history of offering safe and effective coastal kayaking programs. Threats identified were a public opinion about safe coastal kayaking and competition from outfitters in the area. Those strengths point to marketing strategies that may effectively communicate the strengths and take advantage of opportunities, while countering identified threats. Strategies that emphasize distinct advantages for consumers who choose the organization's coastal kayaking programs and services were pursued.

A **marketing strategy** is based on the mission statement and objectives of an organization. Identifying appropriate **market segments**, **product positioning,** and **tactics and programs** is central to the development of a marketing strategy. Often, outdoor experiential organizations have too much to do and too few resources to do it with; therefore, focusing on key **target markets** or **market segments** is a good use of limited resources. Knowing the most common characteristics and attributes of people within market segments that will benefit the most from specific products and services is fundamental to a marketing strategy. For example, one way to identify market segments is to describe aspects of the existing customer base in order to develop a profile of ideal clients and identify what they have in common. New market segments or products may emerge as a result of speculation about target markets of competitors or similar organizations.

Product positioning is a description of the benefits of products from the perspective of potential market segments — a focus on benefits to clients. Special features and selling points are clearly defined for each product to identify what the organization does better, differently, faster, cheaper, with higher quality or with a different spin. Product positioning requires specificity based on the results of the situation analysis and target segments. Product positioning involves creating a unique, consistent, and recognized customer perception about products and the image of the organization. Pricing is also a powerful tool for product positioning and is based on estimating market segment perceptions of value, the organization's pricing ceiling and floor, and the real costs of the product.

There are myriad marketing **tactics and programs** from which to choose. **Tactics** include the development of a **message** about a product to position it, using particular **media** options, sent through appropriate **channels** for reaching a market segment. Marketing **programs** refer to the events that comprise the marketing strategy. Advertising, direct marketing, channel marketing, and public relations are some options. Each offers a range of alternatives and seeks to influence the market in a different way. Taken together, a comprehensive description of **market segments** and **product positioning** establishes a basis for the development of **tactics and programs**.

A simple method for developing tactics and programs is to create a matrix. Products are listed on one axis, and market segments on the other. An analysis of each cell within the matrix, including potential tactics and programs, will provide the foundation for a complete marketing strategy. For example, inherent in the mission of an outdoor education center within a university is the provision of reasonably priced opportunities for leadership development and technical education for students and professional outdoor educators in the region. Each product and market segment is analyzed according to that value, and decisions are made to prioritize marketing strategies that have the best chance of reaching those market segments with information about products that are well positioned to achieve success.

The desire of this outdoor education center is to establish itself as a dependable source of high-quality training for outdoor educators in the region. Because there are a variety of expensive and inexpensive media and delivery channels to choose from, it is important that the outdoor education center develop a marketing strategy that fits its budget and capabilities for distribution. The outdoor education center has a limited budget for marketing its programs and services, and is constrained by university public relations policy that dictates format. The staff creates and analyzes a product/target market segment matrix and decides to use online strategies that are in compliance with public relations policy at the university. It creates distribution lists for students and professional outdoor educators in the region and develops an electronic poster template for approval by the university public relations department. It places program announcements in a key position on its Web page. E-mail distribution lists are used to send printable announcements to market segments that might be interested in its products. The Web page is used as a portal for information and provides a consistent point of contact for queries and registration.

Sales forecasting may include both sales and the cost of sales. Both concepts are relatively simple because they involve breaking sales into manageable parts and then forecasting income and expenses. Determining the actual parts will depend on organizational structure, fiscal management procedures, and resources. Describing them is partly based on common sense and reasonable guesses. One approach to **sales forecasting** is to create a simple spreadsheet, placing products in rows and forecasting periods in columns. Anticipated income for each product is summed for the desired period. A more detailed approach may include a simple **forecast-to-past** comparison, which is a practical and telling way to look for real past results before projecting into the future. The comparison helps an organization to identify key strategy questions. For example, a training and development agency might note that variations in forecast-to-past periods are consistent across several years. Staff review and revise the situation analysis to develop a new or adjusted marketing strategy to maximize sales during up periods and position products for better sales during down periods.

Funds for marketing are normally allocated from the operating budget of a unit or organization. The **expense budget** includes the **sales forecast** and takes into account direct and indirect costs associated with all aspects of marketing. **Direct costs** include the actual development and implementation of marketing strategies. **Indirect costs** include the cost of developing the plan, such as the cost of human resources to work on the plan or support work on the plan, technology, and other costs that might influence the plan. The sales forecast and the expense budget can be modified based on actual sales, research, and experience. Ultimately, both are a guess; however, a more educated guess is more likely to produce a successful marketing plan.

Marketing, done well, should generate leads and potential sales. Failure to market will likely result in leads coming only from word of mouth. For that to be effective, high-quality programs must be consistently delivered to numerous customers.

RISK MANAGEMENT

Risk management is "policies, practices, and procedures used by an organization to appropriately address potential personal injury and financial losses" (Priest & Gass, 1997, p. 123). The nature and degree of legal responsibility that people or organizations have for repairing damages associated with injury as a result of experiential programs relates primarily to **legal liability**. Van der Smissen (1990, 1.41, p.47) states that **tort liability** is the most common type associated with experiential programs and that unintentional acts, or **negligence**, related to the provision of appropriate standard of care will vary with the activity, environmental conditions, and clients.

Therefore, a **risk management plan**, together with a system for implementing the plan, contributes to legal and ethical accountability on the part of an organization. A **risk management plan** has four principal intents:

- "to prevent damage or destruction to property,
- reduce or prevent possible injury or suffering to individuals,
- institute loss-reduction and prevention programs, and
- shift through transfer mechanisms those losses which cannot be controlled by other means" (van der Smissen, 1990, p. 3).

Organizations may choose to control risk by elimination (avoidance or discontinuance of activities or programs), transfer (third-party vendor), retention (paying losses), or reduction (operating as safely as possible in combination with one or more of the prior mentioned options). Reduction is the core of risk management (van der Smissen, 1990, 23.231-23.234, pp.9-12).

Priest & Gass (1997, p. 122) suggest that balancing risks and safety is a central paradox for outdoor leaders and that it is important that customers, clients, and staff understand the benefits of risk taking and the difference between real and perceived risk. Risk management plans will vary according to provider differences and be similar because of industry standards. Ajango (2000) offers an insightful, comprehensive perspective on risk management in *Lessons Learned: A guide to accident prevention and crisis response*, suggesting that a **risk management system** should address the six basic elements: why, what, who, where, when, and how.

- Why? – philosophy, mission, and risk management goals;
- What? – selection of course activities and curriculum;
- Who? – selection and training of staff and participants;
- When? – course scheduling and resource considerations;
- Where? – venue selection; and
- How? – accepted field practices (Ajango, 2000, p. 68-69).

Information gathered in each element is carefully analyzed "to create a system that enhances a [client's] experience, decreases the likelihood of an accident, and ultimately reduces an agency's exposure to legal liability" (Ajango, 2000, p. 68-69). Those elements interact and overlap to form a comprehensive picture of potential risk management needs and strategies.

Why includes program philosophy, mission statement, and risk management goals. Consider a program that philosophically agrees with the principle of "challenge by and of choice" (Schoell & Maizell, 2002, p.14) and does not clearly communicate to staff or participants the implications of that decision making process, or an organization that offers adventure activities that are inconsistent with its stated mission. Potential injury and financial loss may be increased, particularly in the absence of a risk management system that is used to assess inconsistencies and manage them accordingly.

What relates to the selection of course activities and curricula. Appropriate activities should be supported by curricula that are consistent with industry standards and delivered with educational integrity. For example, sequence is inherent in a well-developed curriculum and takes into account readiness for technical skill development, as well as learning style, group influence, and the goals and objectives of the program.

Who involves the selection and training of staff and participants. Staff technical competency should be supplemented by knowledge of client groups, environment, teaching and learning styles and strategies, and organizational policies and procedures. In addition, clients (or their legal guardians) should make decisions about participating in a program based on accurate information about the nature of the program, and the organization should not place financial gain above client safety.

When includes course scheduling and resource considerations. Factors such as the time of day, length of program components, number of breaks, and access to rest spots, bathroom facilities, and water may adversely influence risk propensity. Defensible decisions about these factors, both in the moment by field staff and in planning, are important risk management considerations.

Where a program takes place includes both natural and human-made facilities and support services. Consider a basic canoe instructional program offered in a location that is windy and where motorboat activity is high, versus a secluded bay, sheltered from environmental forces such as wind and sun. Distance from primary care, climatic norms such as rainfall or electrical storm activity, and physical factors such as avalanche hot spots or rock slide tendencies are examples of location factors that should be considered when selecting program sites.

How implies that an experiential program is delivered according to desirable industry standards. Professional organizations, specialized expertise, and information from publications and professional development providers are sources of current information related to the delivery of safe, environmentally sound, and effective programs.

A risk management system requires careful attention to an organization's related policies and procedures for all programs and services, and to how they are supported and implemented by all staff. Challenges abound. Determining appropriate industry standards; developing relevant policies and procedures; recruiting, hiring, supervising, and training staff; maintaining and selecting program venues and natural sites; and developing and distributing risk management forms and participant information sources are among the challenges. The establishment of an internal or external risk management committee helps to ensure that the system is monitored. Many organizations get expert assistance or seek appropriate accreditation to ensure ongoing peer review of programs and services. The Resource Appendix has some helpful places to begin developing a risk management system.

POLICIES & PROCEDURES

Policy and procedure documents provide blueprints for further risk management planning and a basis for program delivery, evaluation, planning, marketing, and personnel administration. These documents may include administrator protocols, employee handbooks, training curricula, equipment and facility management guidelines, emergency plans, media response, and communication rules. Policies and procedures should be carefully written and clearly communicated to all staff.

Policies are statements that guide actions. They are a basis for decision-making and resource allocation. Policies have widespread application and get updated less frequently than procedures. They are expressed in broad terms, addressing major operational issues, indicating what or why. **Procedures** include a series of steps to be followed, often in sequence. They describe ways of implementing policies. Procedures have narrow application and are likely to require updating more often than policies. Procedures are more detailed and state how, when, where, and who. Depending on how they are to be used, policies and procedures can be integrated into one document or written in two separate documents.

Establishing a good **system** for developing, writing, reviewing, and implementing policies and procedures is an administrative function that takes considerable time and commitment. A system will help to ensure that policies and procedures are compliant with industry standards, current with legislation, and specific to organizational needs, programs, services, and resources. Accountability should be built into the system, ensuring that staff and administrators understand and are committed to their responsibilities.

Developing policies and procedures is a balancing act. For example, issues may arise regarding industry standards that dictate changes in policy content and staff training. Client evaluation and customer feedback may highlight a need for new procedures. Changes in the law may require changes in policies. Sometimes, new or revised policies must be developed immediately; other times, additions or alterations can wait for a regularly scheduled review and revision process. Either way, policies and procedures are developed for a reason, and keeping track of relevant internal (accident/incident reporting or new equipment acquisition) and external (inspections, legislation, or accreditation standards) information is necessary.

Writing policy is both an art and a science. Documents that are user-friendly and provide easy access to guiding information are important. Wording should be simple, clear, and written in the common language of the organization. Legalese should be avoided, and references to industry standards should be provided.

Use “shall” for mandated policies and procedures, and use “may” when there are options. Section headings should include key words that provide clues to content that is grouped logically, and the numbering system should be uniform, reflected in the table of contents, and not changed when deletions or additions are made.

Policies should guide, not regulate, staff judgment and should avoid exceptions or extreme cases by seeking an acceptable balance across the big picture. Legal requirements, accreditation standards, training or certification, equipment manufacturer specifications, and activity-specific industry standards will dictate the level of specification. The decision to include detail in a policy document or procedural handbook relates to utility, access, and complexity of programs offered. Consistency and flexibility is critical.

Reviewing policies and procedures is a necessary and informative process that focuses on effectiveness and appropriateness. Policy and procedure documents should clearly indicate edition and information about the assessment period. Some organizations also include a statement indicating that a policy may be assessed or revised before the end of the review period to reflect substantial organizational, industry, or physical changes, or change required by law.

One key to the review process is the establishment of a group of people to assess information and approve or advise changes in documentation. Accident/incident reporting may provide evidence of the need for immediate policy revision. Employees who are expected to use documents on a daily basis, internal and external advisory or policy development committees, and experiential program stakeholders may be involved in the policy and procedure review process. Clear designation of personnel responsible for ongoing policy and procedure review and implementation will help to ensure currency and that documents do not just sit on a shelf.

Implementing policies and procedures that are well written and supported by an ongoing review process is much easier than implementing ones that are not integrated into the ongoing business of the organization. Achieving compliance is most likely when systems for disseminating information, training employees, encouraging ownership, and acknowledging success are in place. Support is key to successful policy implementation.

Implementation is compromised when users do not understand the core values that are embedded in policies and procedures; what is expected of them; or how and why they should change what they do. Implementation is also compromised when users are concerned about policies and procedures. Level of use and level of concern is often a function of experience and training. For example, veteran employees may have enough experience with an organization to interpret flexible or unclear statements, while entry-level staff may not. Strategies that support implementation may include the development of forms or checklists, curriculum outlines, quick-reference field guides, and opportunities for informal or formal discussion and planning meetings.

PERSONNEL & STAFFING

Personnel administration refers to the management of human resources, as distinguished from financial or material resources. Basically, personnel administration is anything related to attracting and developing competent employees, and creating conditions that encourage them to put forth their best efforts. The effectiveness of any organization is a direct function of the quality of individuals who make up the organization. Their knowledge, skills, abilities, and commitment are critical success factors.

Personnel administration is shared, in some way, by all employees. Consider, for example, the program manager responsible for employee supervision. Time and access are necessary conditions for observation, assessment, and reporting, assuming the supervisor has the training and skills to supervise effectively. Consider an employee's responsibility for submitting external training documentation to the personnel file and the manager's responsibility to know when training is needed or certifications have expired. The termination of an employee would require that a chain of documentation is in place to support the decision legally and ethically. Each of those scenarios underscores the complexity of personnel administration. Typically, it includes knowing the **federal and state legislation** that governs recruiting, staffing, and termination; salaries and benefits; training and development; performance evaluation and supervision; management and operations; and legal requirements.

Recruiting, staffing, and termination begin with **job analysis**, a process for documenting the job description and specifications. The **job description** includes the job title, location, Fair Labor Standards Act status, organizational relationships, primary duties and responsibilities, working conditions, physical requirements for the American with Disabilities Act (ADA), and its level of financial accountability.

Job specifications are the necessary qualifications to perform the job. They may include knowledge, skill, and ability functions that are the core competencies a candidate should possess. Documenting job-related duties and how they are weighted, together with a rationale for the position, its influence on the organization, and the specialized education or experience required, helps ensure that the organization is in compliance with various legal requirements, such as the ADA, and that wording meets Equal Employment Opportunity (EEO) Commission standards.

Documented **recruitment** plans and activities demonstrate good-faith efforts to comply with employment legislation. Language must be strictly job related, and must not include functions or activities that are not part of the job. People with military obligations or disabilities, who are over the age of 40, or who have certain physical attributes are examples of potential candidates who are considered among protected classes. Recruitment materials must include a statement that the organization is an Equal Opportunity Employer, abbreviated as E.O.E/M/F/H/V. The last four letters indicate that qualified minorities, females, people who are handicapped, and veterans are encouraged to apply. The goal is to attract a pool of qualified candidates from existing and former employees, previous applicants, the media, third-party sources, educational institutions, and minority-recruiting and nontraditional sources.

The **application** phase is made easier by three steps. First, develop a comprehensive application form that includes basic personal data, education/training, special skills, work history, references (and authorization to check them), employment-at-will/waivers, an equal opportunity for employment statement, a statement regarding truthfulness of the information and authorization to verify all information, and signature of the applicant. That helps the employer to review applications for incomplete or inaccurate information, gaps and changes in employment, or a decrease in responsibility as a career moves forward. Second, be consistent with application procedures to be in compliance with the Equal Employment Opportunity Act.

Questions about age, race, religion, marital status, disabilities, arrest record, or gender usually cannot be asked unless they are approved qualifications that clearly relate to the job description and specifications. Do not preselect candidates; do look at all resumes to avoid barriers that exclude qualified candidates from fair and equitable opportunities based on age, race, religion, marital status, disabilities, arrest record, and/or gender. Finally, prepare to check references and interview candidates.

Reference checking and **interviewing** potential candidates are similar in that they both are guided by job specifications and provide information that takes the place of prolonged observation. Terminating an already hired employee is much harder than asking good questions in advance. Check **references** after reviewing application materials. A defined set of questions that includes performance-specific scenarios, work-history information, and open-ended questions, along with Likert scale choices about important work-related behaviors and characteristics such as attitude, relations with others, ability to learn, initiative, quality of work, quantity of work, attendance, and punctuality, provides a way to compare information from different sources. Make sure to explain job responsibilities carefully, and consider sending the job description to the reference person in advance. Remember that, as is the case with interviews, some questions are not appropriate.

Interviews should include questions that help the employer to judge qualifications, level of skill, and overall competency, while avoiding discrimination. Questions about race, religion, gender, marital status, pregnancy, child care, sexual orientation, physical characteristics, national origin (you may ask if the candidate is eligible to work in the country), financial status, military record, and disabilities normally may not be asked. However, it is permissible under the EEO Act to ask questions having to do with some of the above areas if the employer can clearly and legally relate a question to job functions. Consider the following examples:

- Do you have any job disabilities? vs. Can you perform the duties of the (specify job) you are applying for?
- Have you ever been arrested? vs. Have you ever been convicted of a crime? If so, when, where, and what was the disposition of the case?
- How many children do you have? vs. Do you have responsibilities, other than work, that will interfere with specific job responsibilities (such as travel or field work)?

Termination of employment policies and procedures must be clearly communicated to the employee. Guidelines for appropriate behavior and disciplinary actions must be administered in an equitable, just, and consistent manner. Documentation procedures and the progressive administration of discipline may differ, depending on employment status (full time, part time, or seasonal), and causes for written or oral reprimands, suspension, or termination should be included in policies. In order to cover all possibilities, policies should include a blanket statement that additional offenses not discussed in the policy may be added.

Salaries and benefits may include salary schedules and exceptions for specified employees; personal day and leave stipulations; health, life and dental insurance eligibility; uniform and equipment provisions; retirement plans; professional development provisions; and awards, recognition, and discount and privileges programs. Staff retention is directly related to salaries and benefits; however, a positive, respectful organizational culture is often cited as the factor that most influences employee commitment, performance, and longevity.

Some aspects of **training and development** are site- and program-specific, and others relate to recognized industry standards that support or enhance site- and program-specific training and development. Both are tied to job specifications, existing and new program development, risk management, and employee recruitment and retention. Organizations are obligated to be in compliance with federal and state laws that require some level of training about topics such as work schedules, attendance, and breaks; appearance and performance appraisal; equipment management and vehicle use; harassment and conflicts of interest; handling money, complaints, and inquiries; salaries and benefits; risk management procedures; relating to customers and clients, enforcing rules and managing behavior.

In addition, employees in experiential programs execute job functions for which they might need training, certification, licensing, or professional development. Central to making decisions about this training and development are questions about program quality and legal issues. High-quality experiential programs that help protect an organization from litigation are developed and delivered by personnel who have the skills, knowledge, and attitudes the profession advocates as best practice.

Training and development in these areas may be internal, external, or a combination of both. If internal competencies for delivering train-the-trainer opportunities are not available within the organization, then training by an external, industry-recognized third party is suggested. Emergency procedures and specialized technical skills are examples of areas of training for which external vendors are generally best suited.

Furthermore, attendance at professional conferences and access to professional journals, books, and newsletters help personnel keep up-to-date with policies, procedures, and practices in program activities. Personnel should be familiar with program areas, environmental conditions, client characteristics, rescue and emergency systems, local and activity safety issues, and equipment management procedures. Formal training and development should be supplemented by taking time for direct experience and practice in contexts that are program- and site-specific.

Supervision and performance evaluation help staff to know what is expected of them, how to interpret policies, whether they are meeting performance expectations, and how to improve performance or change expectations. Both help supervisors gain insight into frontline or field operations from which they are often distanced and for which they are responsible. **Supervisors** who provide constructive, respectful guidance and direction on an ongoing basis are less likely to be inundated with personality conflicts, faced with client complaints or poor program evaluation data, or suffer the consequences of poor staff morale. Investment in good supervision is a win-win practice that often includes formal and informal opportunities for observation, discussion, and planning and that takes into account employee and supervisor needs.

Performance evaluation is more structured and is based on specified criteria that are deemed important by the organization and conveyed to the employee from the beginning of employment. A system for administering performance evaluation may include annually submitted documentation by the employee; an evaluation form completed by the supervisor; a schedule for evaluating full time, part time, and seasonal employees; response or appeal procedures; and policies for merit or annual pay increases based on performance evaluation.

Someone or some unit within an organization is responsible for **operations and management** associated with human resources. Typically, **personnel operations** include related financial and operational planning for human resource services such as equipment and facilities, supplies and materials, contracted services, and staff.

Personnel management refers to the roles and responsibilities for ensuring that recruiting, staffing, and termination; salaries and benefits; training and development; and performance evaluation and supervision are carried out according to organizational policies and procedures and in compliance with state and federal laws.

Organizational **policies and procedures** for managing human resources may be implemented by several employees who share responsibility for different aspects of one of more areas within personnel administration. For example, a system for documenting internal and external training and development may require field staff, supervisors, and managers to submit training certificates, document training performance criteria and feedback, and notify employees of deadlines for recertification. Having clearly stated and well-managed policies and procedures for how employees carry out their job functions (from parking to resigning; from keeping confidential and public records to advertising job opportunities; and from traveling internationally to submitting a sexual harassment complaint) is an important management function.

Legal requirements inform all aspects of personnel administration and are, in some cases, dependent on the organization size (number of employees) and status (government or nongovernment). Experiential programs may be subject to legislated requirements in areas such as employee rights, wages and hours of work, workplace health and safety, retirement and health benefits, and work authorization for non-U.S. citizens. In addition, standards that govern professional accreditation and licensure have implications for some experiential programs and should be considered from both legal and ethical perspectives.

Some key legislation affecting employee rights include, but are not limited to (see the next section for more comprehensive resources):

- Title VII of the Civil Rights Act prohibits discrimination or segregation based on race, color, national origin, religion, and gender and covers protected classes, career progressions, pregnancy, training, sexual harassment, and compensation practices.
- Civil Rights Act of 1991 expands the damage awards available to victims of discrimination.
- Age Discrimination in Employment Act of 1967 protects people age 40 and older.
- Americans with Disabilities Act of 1990 prohibits discrimination against qualified individuals with a disability and provides guidelines related to defining related disabilities, reasonable accommodations, and undue hardships on the part of the hiring organization.
- Pregnancy Discrimination Act of 1978 prohibits discrimination on the basis of pregnancy, childbirth, or related conditions.
- Immigration Reform and Control Act amended in 1990 prohibits discrimination on the basis of national origin or citizenship and establishes penalties for hiring illegal aliens.
- Privacy Act of 1974 protects the privacy of personal information such as off-the-job conduct and confidential human resources information.
- Fair Credit Reporting Act amended in 1997 protects the privacy of background information and its accuracy.
- Family and Medical Leave Act of 1993 allows employees to take up to 12 weeks of unpaid leave for the birth of a child or adoption or foster-care placement; serious health condition of a spouse, child, or parent; and serious health condition of the employee.

RESOURCE APPENDIX

Experiential programming takes place in a variety of settings, with diverse customers and client groups, and is delivered by many types of recreation, education, training and development, and therapeutic agencies. It is impossible to present a comprehensive set of resources to cover all of those. Readers are encouraged to review applicable sources obtainable through academic and public library databases, professional association publication catalogs, independent sources, online search engines, and reference lists found in textbooks and articles. Works used directly in this book have been cited as footnotes. Activity-specific resources such as game books, instruction manuals, and activity guides are not included in this chapter and may be located through publishers and vendors, or on professional association web pages.

This chapter contains helpful resources that are separated into eight sections, including print & publications, professional associations, databases & full text services, online tools, client assessment, personnel administration, planning & marketing, and risk management. These lists are by no means comprehensive and are offered as a starting point for experiential programmers to explore more in depth or adjunct information of interest.

Topic lists are not mutually exclusive. For example, the client assessment list includes sources that help to identify client characteristics related to intellectual, emotional, physical, and social development, and the tools and instruments list includes several examples of public domain tools that may be used for diagnosis or processing experiences throughout a program. Databases also include publications, workshops, research, and links to additional resources. The intention is to provide a range of resources that will help experiential programmers begin to access resources that will strengthen programs and lead to better results. As a rule, if you can't find something you need, use the professional association and database lists to search more in-depth resources.

The chapter provides URL information, rather than specific citations or location information, to enable readers to access organizations, companies, and people who manage more in-depth and specific information. The following Websites were checked and found current as of July 1, 2004.

PRINT & PUBLICATIONS

Access Outdoors. http://www.accessoutdoors.org/publications.cfm

Australian Journal of Outdoor Education.
http://www.wilderdom.com/ajoe/

Camping Magazine. http://www.acacamps.org/campmag/

Journal of Adventure Education and Outdoor Learning.
http://www.outdoor-learning.org/jaeol/index.htm

Journal of Experiential Education.
http://www.aee.org/publications/journal/aeejourn.html

Journal of Leisure Research.
http://www.nrpa.org/content/default.aspx?documentId=508

Journal of Park and Recreation Administration.
http://www.nrpa.org/content/default.aspx?documentId=509

Parallel Lines. http://www.acctinfo.org/newsletter.html

Pathways – The Ontario Journal of Outdoor Education.
http://webhome.idirect.com/~hesterkb/coeo/Pathways

The Outdoor Network. http://www.outdoornetwork.com/

The Therapeutic Recreation Journal.
http://www.nrpa.org/content/default.aspx?documentId=511

PROFESSIONAL ASSOCIATIONS

Access Fund. http://www.accessfund.org/

American Alliance for Physical Education, Health, Recreation and Dance. http://www.aapherd.org

American Camping Association. http://www.acacamps.org/

American Canoe Association. http://www.acanet.org/

American Mountain Guides Association. http://www.amga.com/

American Psychological Association.
http://www.apa.org/homepage.html

American Society for Training and Development.
http://www.astd.org/astd

Association for Adventure Sports. http://www.adventuresports.ie/

Association for Business Simulations and Experiential Learning.
http://www.towson.edu/~absel/newabsel/

Association for Challenge Course Technology.
http://www.acctinfo.org/

Association for Environmental and Outdoor Education.
http://www.aeoe.org/

Association for Experiential Education. http://www.aee.org

Association for Outdoor Recreation and Education.
http://www.aore.org/

Council for Adult and Experiential Learning. http://www.cael.org/

Council for Environmental Education. http://www.cee.org.uk/

International Consortium for Experiential Learning.
http://www.el.uct.ac.za/icel/

National Association of Experiential Education.
http://www.nsee.org/intro.htm

National Recreation and Parks Association. http://www.nrpa.org/

North American Association of Environmental Education.
http://www.naaee.org/

Outdoor Behavior Healthcare Industry Council.
http://www.obhic.com

Society for Human Resource Management. http://www.shrm.org/

The American Alpine Club. http://www.americanalpineclub.org/

The National Association of Therapeutic Wilderness Camps.
http://www.natwc.org/

The Outdoor Network. http://www.outdoornetwork.com

Wilderness Education Association. http://www.weainfo.org/

Wilderness Risk Managers Conference. http://www.nols.edu/wrmc

DATABASES & FULL TEXT SERVICES

Adventure Research Cache.
http://webdb.iu.edu/Hperweb/iole/index.cfm

Coalition for Education in the Outdoors.
http://www.outdooredcoalition.org/research.htm

Educational Resources Information Center (ERIC/CRESS).
http://www.eric.ed.gov/

OutdoorEd the Professional Resource. http://www.outdoored.com/

Outdoor Education Research and Evaluation Center.
http://www.wilderdom.com/research.html

ProQuest Information and Learning. http://umi.com

Research Connections.
http://www/indiana.edu/~outdoor/resconx.htm

TARRAK Technologies. http://www.tarrak.com/FREE/res.htm

The Active Reviewing Guide. http://www.reviewing.co.uk/

ONLINE TOOLS

Learning Strengths: Multiple Intelligences.
http://snow.utoronto.ca/courses/mitest.html

Learning Styles On Line: Learning Style Inventory.
http://www.learning-styles-online.com/inventory/

The International Dairy, Deli, Bakery Association: Team Effectiveness Inventory. http://www.iddba.org/trntool1.htm

The Personality Page: Personality Type
http://www.personalitypage.com/home.html

Vision Realization: Free Organizational Resources.
http://www.visionrealization.com/Resources/resources.html

CLIENT ASSESSMENT

Buckingham County Public Schools.
http://www.geocities.com/timj298/Earlychldhdevpg.html

Development Through the Life Span.
http://www.abacon.com/berk/lifespan/summaries.html

GMU Online Resources for Developmental Psychology.
http://classweb.gmu.edu/awinsler/ordp/topic.html

PERSONNEL ADMINISTRATION

Americans with Disabilities Act.
http://www.usdoj.gov/crt/ada/adahom1.htm

FindLaw for Business. http://biz.findlaw.com/states_new.html

Matthies Law Firm, P.C. Summary of Employment Laws of the U.S. Government. http://members.aol.com/mattlawfrm/fedlaw.htm

U.S. Department of Labor. Elaws: Employment laws assistance for workers and small businesses. http://www.dol.gov/elaws/

U.S. Department of Labor. Employment Law Guide: Laws, Regulations, and Technical Assistance Services.
http://www.dol.gov/asp/programs/guide.htm

PLANNING & MARKETING

Action Plan Marketing: Marketing Plan Workbook.
http://www.actionplan.com/pdf/actionplanworkbook.pdf

Authenticity Consulting, LLC.: Free Management Library.
http://www.managementhelp.org/

Claritas. http://www.claritasmarketing.com/marketanalysis.html

MPlans: Marketing Plan Resources.
http://www.mplans.com/ot/index.cfm

U.S. Small Business Administration: Business Initiatives Education Training.
http://www.sba.gov/gopher/Business-Development/Business-Initiatives-Education-Training/

RISK MANAGEMENT

Adventure Incorporated. http://www.adventureincorporated.com/

Outdoor Network: Outline to Creating a Risk Management Plan.
http://www.outdoornetwork.com/sourcenet/preston_win99_risk_man.html

Outdoor Safety.org: Risk Management Resources.
http://www.outdoorsafety.org/resources/Resources.asp

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CHECKLIST

CONTRACTING

[ ] receive customer inquiries
[ ] send out further information
[ ] get to know your customer
[ ] learn their descriptive desires
[ ] identify required resources
[ ] check resource availability
[ ] calculate prices (with/out)
[ ] negotiate the initial bid
[ ] renegotiate the final bid
[ ] obtain a signed contract
[ ] arrange subcontractors
[ ] receive deposit/advance
[ ] lock in/commit resources

DIAGNOSING

[ ] collect client ready/demo data
[ ] confirm program type & purpose
[ ] hold customer conversation
[ ] administer survey instrument
[ ] conduct personal interviews
[ ] observe client behaviors
[ ] analyze data gathered
[ ] create goals & objectives

DESIGNING

[ ] resolve customer/client discrepancies
[ ] refine purpose, goals & objectives
[ ] create L.E.T.S. Plan criteria
[ ] L.E.T.S.: events & activities
[ ] L.E.T.S.: framing themes
[ ] L.E.T.S.: assign groups
[ ] L.E.T.S.: select and assign staff
[ ] L.E.T.S.: pick equipment
[ ] L.E.T.S.: decide on venue
[ ] L.E.T.S.: choose facilities
[ ] L.E.T.S.: select catering
[ ] L.E.T.S.: pick accommodation
[ ] L.E.T.S.: decide on transportation
[ ] L.E.T.S.: choose communication

[ ] L.E.T.S.: calculate staff expenses
[ ] L.E.T.S.: budget for finances
[ ] L.E.T.S.: address other logistics
[ ] double- and triple-check L.E.T.S.
[ ] develop final plan/design
[ ] receive final plan approval
[ ] request balance of payment

DELIVERING & DEBRIEFING

[ ] collect medical/legal forms
[ ] prepare staff for program
[ ] welcome arriving clients
[ ] lead introduction & opening
[ ] conduct body of events & activities
[ ] identify learning opportunities
[ ] guide facilitated discussions
[ ] use nonverbal alternatives
[ ] generate awareness of learning
[ ] lead conclusion & closing
[ ] create willingness to change

DEPARTING

[ ] compose action plans
[ ] distribute anchor souvenirs
[ ] perform program evaluation
[ ] arrange for follow-up program
[ ] speak commitment to change
[ ] say goodbye to clients

IMPROVING

[ ] return & repair equipment
[ ] pay staff & reimburse expenses
[ ] conduct staff meeting
[ ] get staff feedback
[ ] acknowledge & pay subcontractors
[ ] get subcontractor feedback
[ ] thank & invoice customers
[ ] get customer feedback
[ ] examine client evaluations
[ ] excerpt client feedback
[ ] redesign program from all feedback
[ ] document changes & positives/negatives
[ ] archive program materials
[ ] write final report

GLOSSARY

Action: first step in the experiential learning cycle of “doing” the activities and events in a manner that is active rather than passive.

Clients: people participating in the program and directly benefitting from the program outcomes.

Community: creates the customer’s obligation to request a program and indirectly benefits from clients completing the program.

Consumers: the ones who utilize the program and a collection of customers, clients, and the community.

Continuation: fourth step in the experiential learning cycle, composed of self-defined strategies to sustain change in daily life.

Contracting: everything from an initial inquiry by a customer, through negotiations, to a signed contractual agreement.

Customers: pay for the program and usually request a program in order to meet a need for training, growth, rehabilitation, learning, and/or change.

Debriefing: where the reflection, integration, or continuation steps of the experiential learning cycle primarily take place.

Delivering: presenting the program as planned in the design phase, while remaining flexible and changing parts as necessary.

Departing: when clients leave the program after writing action plans, completing evaluations, receiving anchored souvenirs, and scheduling an optional follow-up (checkup or booster) session.

Designing: planning the program based on the assessed needs from the diagnosis and refining the program purpose, goals, and objectives, while making decisions about L.E.T.S. Plan elements.

Development programs: principally change the way people behave (think and feel) by increasing functional actions.

Diagnosing: assessing the needs of clients, customers and the community by using conversations, instruments, interviews, and observations as appropriate.

Discussions: turn learning opportunities into awareness, willingness, and commitment through the processes of reflection, integration, and continuation as led by facilitators after events or activities.

Education programs: principally change the way people think (and feel) through increased awareness or knowledge.

Experiential: a philosophy that is more than "learning by doing." All learning is experience-based, but for learning to become experiential, the doing or action step must be followed by a cycle of three other steps (reflection, integration, and continuation).

Five forces analysis: guides an organization in the analysis of its environment and the attractiveness of its programs or services by examining five forces (risk of new competitors, threat of potential substitutes, bargaining power of buyers, bargaining power of suppliers, and degree of rivalry between competitors).

Gap analysis: evaluates the difference or gap between the current position of the organization and where it wants to be, so that the organization may focus on synergy that will close the gap.

Goals and objectives: general and broad statements arising from diagnosis and/or analysis that then direct planning and/or design.

Improving: receiving and using detailed feedback about program and related service quality from stakeholders (clients, customer, community, subcontractors, staff, and profession).

Integration: third step in the experiential learning cycle of transferring new learning from the experiential environment to daily life, where that learning shows up as a change in feelings, thinking, behavior, or resistance.

Learning opportunities: the chance to change if people develop awareness, willingness, and commitment around multiple activities or a single event by adding reflection, integration and continuation.

Marketing: a set of actions designed to positively influence the perceptions and choices of customers, so that they contact the provider to inquire about a program.

Marketing plan: a written document containing description and guidelines over a defined planning period for marketing tactics, products, and services (most likely programs in this case).

Master planning: the process of charting an organization's future in terms of projects and/or goals, including the methods to get there.

Mission: a statement that captures an organization's purpose, customer orientation, and business philosophy by answering three questions (who are we, who do we serve, and how do we serve?).

Needs assessment: the basis for master planning, in which the initial phase is devoted to researching existing conditions and identifying deficiencies that lead to goals and objectives.

Outdoor adventure: a subset of experiential learning, when the outcome is uncertain and the action takes place in natural or human-made environments.

Personnel administration: the management of human resources, related to attracting and developing competent employees, and creating conditions that encourage them to work their best.

Policies: documented statements that guide actions and are used as a basis for decision-making and resource allocation. Policies have widespread application, are expressed in broad terms, and get updated less frequently than procedures.

Private programs: prepared for a specific, closed group of people and customer-centered in their programming approach.

Procedures: describe stepwise ways of implementing policies. Procedures have narrow application, are documented in specific terms, and are likely to require updating more often than policies.

Profession: governs the operating procedures, ethics, and overall effectiveness of programs and their providers.

Program: in response to a need for training, growth, rehabilitation, learning, and/or change, these are composed of planned learning opportunities, events, and activities; the experiential steps of action, reflection, integration, and continuation; and the supporting logistics, staffing, and timing.

Programming: the deliberate and purposeful arrangement of one or more activities and events (called the program) so as to create a series of potential learning opportunities that lead to changes in how people feel, think, behave, or resist.

Providers: the ones who produce the program and a collection of suppliers, staff, and their professions.

Public programs: open to general enrollment by anyone in a given population and client-centered in their programming approach.

Recreation programs: principally change the way people feel by re-energizing, entertaining, or relaxing them with a focus on fun, socialization, and enjoyment.

Redirection programs: principally change the way people resist (behave, think and feel) with decreased denial or opposition.

Reflection: second step in the experiential learning cycle of identifying lessons learned from an experience, usually during a debriefing session with a trained facilitator.

Risk management: policies, practices, and procedures used by an organization to appropriately address potential personal injury or financial loss that could adversely influence the organization's future.

Sales: the process of negotiation between initial inquiry and signed contract. Sales are separate from, but related to, marketing.

Staff: employees who prepare and facilitate the program content in keeping with the program purpose, goals and objectives.

Strategic planning: the process of mapping an organization's future with a focus on adaptability to change, flexibility, and the importance of strategic thinking, organizational learning, societal norms, and organizational values.

Suppliers: plan and execute the program format in keeping with their organizational vision and mission.

S.W.O.T.: a strategic planning methodology that identifies internal strengths and weaknesses, in alignment with external opportunities and threats.

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ABOUT THE AUTHORS

Jude Hirsch, Ed.D., is the coordinator of graduate and undergraduate programs in outdoor education and the director of the Outdoor Education Center at Georgia College & State University. Her writing and research is in outdoor education program administration, curriculum and instruction, program evaluation, and environmental education. She provides facility design, program development, and strategic management consultation to a range of recreation and education agencies using mission-related outdoor and experiential education strategies. Jude is currently a member of the Association for Experiential Education Accreditation Council.

Simon Priest, Ph.D., is the leading researcher and writer in experiential training and development with corporations. He currently consults in facilitation training, leadership enhancement, and executive development for a handful of progressive companies interested in staying ahead of their global competition by focusing on the development and maintenance of human resource relationships. Now early retired, he maintains adjunct professorships at several universities and management institutes around the world.

Jude Hirsch and Simon Priest have more than 50 years of combined experience as experiential educators. Both have significant experience teaching in related university programs and as consultants to recreation, education, corporate, and therapeutic organizations. The authors met in Milledgeville, Georgia, to discuss the need for and format of this book. It became clear at that time that a resource such as this could make a significant contribution to the field by describing a comprehensive process for designing and delivering adventure programs that includes realistic examples and selected resources for additional information.

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