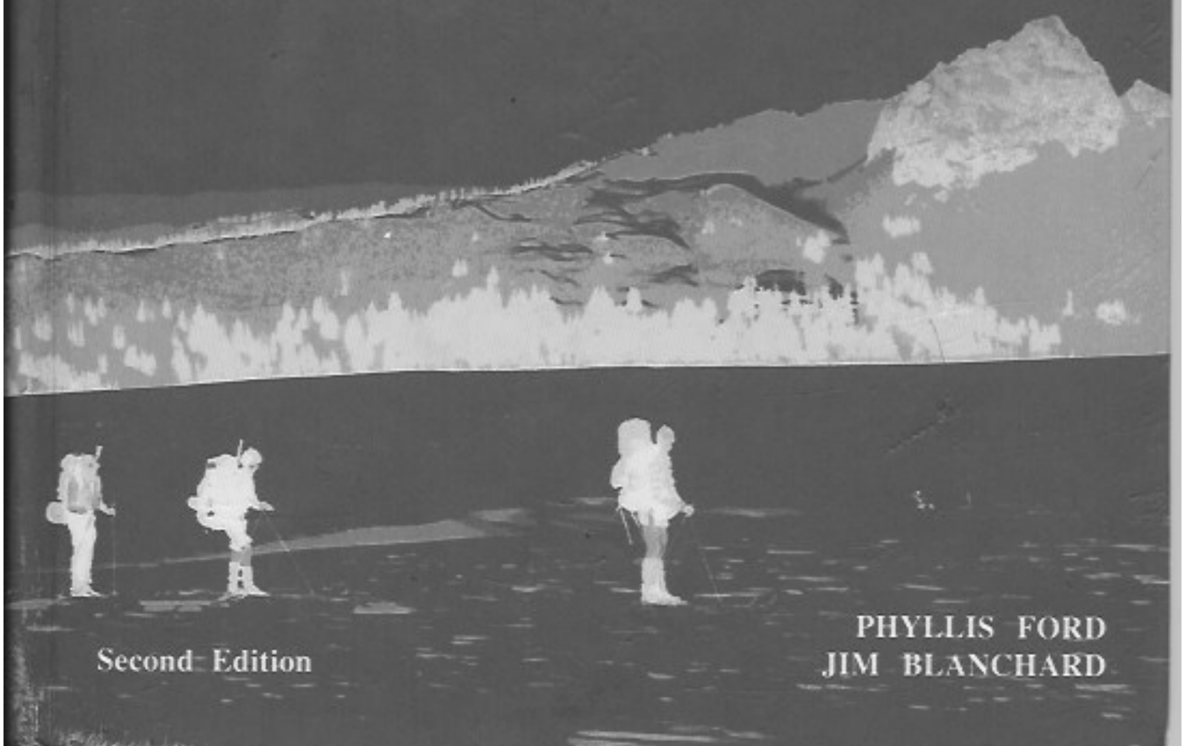
LEADERSHIP AND ADMINISTRATION

OF

OUTDOOR PURSUITS



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PHYLLIS FORD
JIM BLANCHARD

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chapter eleven

BASIC ADMINISTRATIVE PLANNING

Regardless of the type of enterprise, the organizational pattern or the size of the staff, there are certain generic administrative tasks that must be undertaken prior to leading a group into the outdoors. Primary administrative functions are programming, staffing, scheduling, budgeting, and evaluation. They may be the responsibility of the leader, the supervisor, the organization's directors, or a combination of all three. Ideally, each person keeps in close communication with the others so that there is no misunderstanding about policies, planning, or implementation. Each of the functions is related to the others, and the administrator must develop and modify all of them concurrently.

Programming

Programming is a widely studied and documented topic among professionals in the recreation services field. It is discussed in several books that offer the reader both theoretical and practical points. The material presented here is based upon current practices and recommendations for programming in all recreational activities. Program is defined as the practical implementation of the sponsoring agency's goals and objectives. In other words, the program is the vehicle through which an organization meets its goals. In reality, the program is everything—planned and unplanned—that affects the participants. Unexpected storms, poor tasting meals, transportation that breaks down, beautiful sunsets, and the joy of making new friends are all part of what the participants perceive to be portions of the program. Basically, programming entails planning for everything that should occur as well as the things that might occur.

Programming, the planning of programs, must begin with a well-defined set of goals and objectives. "Well-defined" means well-thought out and well-understood, but not fixed or immutable. Planning is a dynamic, interactive process. Initial targets and directions are essential in any enterprise, but almost always must be modified as one develops a clearer picture of the actual program. Before a program is planned, the programmer should understand the objectives of the organization. If these objectives are in conflict with those of the program planner, the plans should be aborted immediately. If the goals of the organization are related to teaching minimum camping skills to beginners and the leader wishes to take the group up a 10,000 foot peak to teach ice climbing techniques, the goals of the leader are in conflict with those of the organization. For ethical and legal reasons, no program should be implemented unless it is consistent with the purposes of the sponsoring organization.

The goals and objectives of sponsoring organizations and, consequently, the outdoor recreation programs themselves vary widely. Some may focus on environmental awareness or education; others will emphasize some aspect of personal growth, recreation, or skill development.

Certainly, the objectives of outdoor programs planned for such diverse groups as a college recreation program, a college academic program, a youth agency, a community center, a private enterprise offering vacation trips, or a group of learning disabled adults will all differ. While any outing affords many benefits, program goals determine the area or areas to be emphasized, and program objectives determine the activities and methods to be employed. Goals are statements of general direction or purpose. For example, a goal of a college outdoor leadership class might be expressed as "to provide opportunities for outdoor leadership development," or "to develop skilled, ethical, and responsible outdoor leaders."

Program objectives should be attainable and measurable, and it should be possible to verify that they were met. The following guidelines may help in writing objectives.

In form, each objective should:

1. Start with the word "to" followed by an action verb (e.g., to carry a 35-pound pack 8 miles a day for 5 days).
2. Specify a single result to be accomplished.
3. Specify a target date for the accomplishment (e.g., upon completion of the course).
4. Be as specific and quantitative (hence, measurable and verifiable) as possible.
5. Specify only the "what" and "when." Avoid the "why" and "how."

In content, each objective should:

1. Relate directly to the goals of the organization.
2. Be readily understandable by those who will be contributing to its attainment.
3. Be realistic and attainable, but represent a significant challenge.
4. Be consistent with the resources available or anticipated.
5. Be consistent with the basic policies and practices of the organization.
6. Be willingly agreed to by all parties without undue pressure or coercion.

Examples of objectives for an outdoor leadership course could be:

Upon completion of the program participants will be able:

a. To teach basic canoeing skills to beginning paddlers.
b. To teach group cooperation through a two-day and one-night canoe trip on a flatwater lake.
c. To organize and implement an eight-week canoeing class for sixteen participants which develops their ability to travel safely and responsibly by canoe on flat water for two days.

Program Contents

Recreational programs are often categorized according to activity types such as arts and crafts, music, drama, literature, dance, sports and games, and outdoor activities. In actuality, it is possible to incorporate all the other types of activities into the outdoors.

Another way of categorizing programs is by activity format which refers to the form or organization of the activity. The number of program activities with land- and water-based outdoor foci is surprising if one considers the possibilities within each of the formats. The following list describes the formats and includes some examples of programs that may be developed around each of them. The list reflects the terminology used currently by several authors. While the major part of this book centers on land- and water-based activities carried out in the natural environment away from the comforts and security of the urban environment, other activities may be included as integral parts of such programs. Such activities may be carried out during pre-trip training, on the trip, or at post-trip review sessions. Or they may be used as programs offered to complement and/or supplement the outdoor-pursuit offering.

Activity Formats

Competitive events: (These are games and contests between individuals and groups.)

Orienteering contests
Tent pitching races
Softball on snowshoes
Identification contests
Outdoor cooking contests
Cross-country ski races

Self-directed activities: (This includes drop-in, open facility, and special interest activities. No organization or program structure is needed for these activities. They are self-interest activities usually taking place in a reference room, library, or multipurpose room. The participants "drop-in" and stay only as long as they wish. Supervision is mainly for the purposes of safety; however, there may be some incidental instruction.)

Map reading practice
Knot-tying boards
Reading reference books
Working on personal equipment

Social activities:

(1) Interest Groups: (These are groups of people with no common bond other than an interest in the topic. Interest groups have no organizational structure and are made up of individuals who attend as they wish. A great many outdoor trips, climbs, and other activities come under this format.)

Lectures, slide shows, and films
Nature walks
Municipal outings
Commercial trips and tours

(2) Clubs: (Clubs are membership groups with organized operating codes or policies, officers, and usually a dues structure.)

Hiking clubs
Youth agency troops
Natural history associations

Special events, including performance and spectator activities: (These are activities that occur only occasionally, require careful planning, and usually have no prerequisites or follow-up programs. They occur on specified dates and times.)

Winter carnivals
Pot lucks
Progressive cook outs
Award programs
Recognition nights
Litter clean up trips
Trail building trips
Fund raisers (e.g., sponsoring hikers or boaters for $ 0.50 or $1.00 per mile.)

Self-improvement or educational activities: (These instructional programs offer specific knowledge or skills. They meet at specific times with planned progressions. Participants usually attend from the first session to the end and usually pay for the block of lessons. In a recreational situation, educational activities are voluntary; nevertheless, the same program formats and ideas can be incorporated into school and college classes.)

First aid
Weather
Map and compass
Plant identification
Geology
Outdoor cooking
Swimming
Photography
Astronomy
Animal tracks
Bird watching
Care and repair of equipment
Making and remodeling equipment
Mountaineering

In addition to different formats, programs can be developed for different age and skill levels, and can be organized by season, month, and sometimes week. All outdoor-pursuit leadership does not occur on a trail or river; some may happen indoors, in town, and in structured lectures. Working one or more of the activity formats into the program may help one meet the interests and needs of many participants.

Recreation Programming Principles

Recreation programs are based upon certain principles generally agreed upon by professionals in the recreation field. One may think of a principle as a "guiding rule to action" (e.g., a rule of conduct). By incorporating these principles into program planning, the programmer can provide the participant with the same quality program that he/she expects from other similar programs. This is tantamount to quality control used in the manufacturing of market goods, as it controls the quality of the program. The length, type, and content of every program should be based upon the consideration of both the group itself and individuals within the group.

Group-Centered Principles

The extent to which each principle will be followed varies according to the type of group. Groups consisting of single categories of individuals (i.e., Boy Scouts) will be less affected by some guidelines than groups made up of a wider range of individuals (i.e., participants from a community center). Accordingly, the following ten principles do not apply equally to all groups; however, each should be considered.

1. Planners must consider the needs and interests of the group, and the available leadership, equipment, finances, and resources (land or water).

2. The program should be planned for many age ranges and abilities within the group. For example, a youth group may range from ages ten to sixteen, include beginners and experts, and consist of both able-bodied and disabled members. A college class may consist of people who range in age from seventeen to over sixty and who portray a wide range of abilities, conditions, and interests. A community center group usually consists of a wide range of ages, abilities, socio-economic levels, and interests. Obviously, the municipal outdoor programmer has a much more diversified clientele than does the planner of a program for a narrowly-defined group.

3. The program should offer a majority of activities within the financial budgets of all potential participants. If some members of the target group cannot afford the program, either the program should be altered or expenses should be somehow defrayed (through scholarships, donations, borrowing, renting, improvising). (This recreation programming principle applies largely to tax-supported programs.)

4. The program must be operated in a manner that serves as a model for participants. Program standards for safety and environmental responsibility will be reflected in the behavior of participants when they conduct personal ventures. (It is better to turn back in an emergency and refund some money than to endanger the lives of the participants.)

5. When possible, programs should offer the continuity of year-round operation. Courses about care and repair of equipment, first aid, meteorology, geology, map and compass, etc., all contribute to the overall outdoor program and can be offered during what is often called the "off-season."

6. The program should provide activities that are varied and progressive (new places, new activities, new levels).

7. The program should be a supplement, or complement, to what is already offered and available within the community.

8. Planning should be long-range, to ensure future leadership, finances, facilities, and equipment.

9. The program should be based upon the standards developed by national agencies or research studies. (Ratios of leaders to participants, leader competencies, progressions, equipment, etc.)

10. The program should follow the best current practices in the field.

Individual-Centered Principles

Planners also need to consider each individual by keeping the following principles in mind:

1. The program should provide the individual with an outlet for expressing skills and interests.

2. The individual should be provided with the widest possible range of individual choices in a variety of activities. This will vary with different groups. A prescribed outdoor course or a college class will have fewer choices than one sponsored by a municipal recreation department or one offered to private individuals seeking leisure experiences outdoors.

3. Individual differences should be recognized and accommodated when possible.

4. Every program should provide the opportunity for social interaction and fellowship.

5. Every program should create and develop an interest in self-leadership, self-sufficiency, and self-reliance. The program that makes groups and individuals reliant on the leader may be missing a primary potential purpose of outdoor pursuits—that of developing self-reliance. "Full-service" guiding may or may not move clients toward self-sufficiency. In order to avoid overconfidence, clients in "full-service" programs must be made to understand their own capabilities and limitations. They must understand that they are not investing in a program that automatically gives them the ability to duplicate the same trip without the service of the guide.

6. The program should involve the participant in the planning process and, insofar as possible, in the decision-making process.

7. The program should provide the opportunity for creative expression. Singing, storytelling, menu-making, cooking, and joking are all forms of self-expression.

8. The program should provide the opportunity for adventure and new experience. Even though the leader has been there and done something a hundred times, it must be treated as a new and wondrous adventure to the beginner. Instead of belittling a climb with "Oh, I've done that route lots of times," a leader could say, "Isn't the view from the ridge spectacular?" or "What did you think of the steep pitch just before the summit?"

When trying to follow the principles, one might consider inserting some of the program formats mentioned above into the program. Some of the formats can help the programmer meet specific principles better than others, and by using several formats, there is a better chance of implementing all the principles.

Staffing

Staffing is perhaps the greatest single challenge for administrators of outdoor programs. Safe, high-quality experiences for clientele, and, ultimately, the success of the program depend upon the abilities of field staff working in potentially hazardous remote field locations. The administrator faces the formidable task of determining the size and qualifications of staff members, locating and assessing potential employees, and hiring, training, and supervising the staff. The easiest way to attack this complex problem may be to divide it into manageable parts, as in the following material.

Many of the decisions that must be made with regard to staffing require a sound, current, working knowledge of the realities of field leadership of the activity in question. More often than not, the administrator faced with the responsibility for staffing decisions is not a participant in the activity, much less an experienced, active leader or instructor in the activity. Given the importance of making good decisions in terms of both program quality and personal and program liability, and given the large amounts of time and expense involved in the staffing process, the administrator is strongly advised to seek assistance from those who have the necessary background and up-to-date expertise.

Identification of Needs

While identification of staffing needs is clearly prerequisite to initiation of a search for staff, one should be prepared to rethink the proposed program in light of the qualifications of the potential personnel identified in the search process. Often, some modifications in the proposed programs are needed to accommodate limitations in the abilities of the available staff or to take advantage of greater than anticipated staff capabilities. Nevertheless, probable needs must be identified to provide a starting point. The number of personnel required to operate a program is, to a large extent, dependent upon the abilities and workloads of each staff member. It is often easier to begin by listing the particular activities and/or outings that must be staffed, grouping similar elements together. For example, one might group hiking- and backpacking-related aspects of the program together, since these activities require similar skills. Activities, such as rock climbing and mountaineering, might be grouped together as they require expertise in rope handling and climbing skills.

While it may be possible to locate individuals capable of leading a wide-range of activities, it is most likely that a search will yield individuals with relatively narrow fields of expertise. It is relatively easy, for example, to locate individuals who have extensive backpacking expertise and adequate leadership potential. It is considerably more difficult to find experienced mountaineers, much less mountaineers who have the additional safety and rescue training necessary to conduct activities safely. Too often, ardent outdoor enthusiasts focus almost exclusively on one aspect of land or water activity, and have, at most, a passing familiarity with activities outside of their special area of interest.

As a result, it is often necessary to define staffing needs on the assumption that several specialists must be hired. While cumbersome, this often results in superior initial program quality, and may provide flexibility and improved continuity if, through in-house apprenticeships and training, staff can be encouraged to broaden their horizons.

Assume that you are faced with the relatively simple task of staffing a weekend backpacking program. Where do you begin? First, it is important to know as much as possible about the proposed program. How many outings are planned? What is the expected group size? Who will participate, and what is the nature of the group? Where and during what season will the outings take place? Many factors must be considered before determining the number of leaders needed. In a few cases, it may be sufficient to provide a single leader. More often, and certainly in the case of most multi-day backcountry outings, at least two leaders will be needed. (For suggestions on leadership ratios and qualifications for various activities, refer to Chapters Sixteen and Seventeen.) Typically, such outings are staffed by a fully-qualified leader and a competent but less experienced assistant.

The specific minimum qualifications of each depend upon the nature and purpose of the outing. The staff must be capable of safely facilitating achievement of the program objectives. While basic safety and group management skills are needed by leaders of any backpacking outing, program objectives often define additional leadership requirements. Basic leadership skills may suffice for the leaders of beginning level summer day hikes; however, considerable additional experience and skill may be required for off-season travel, longer outings, or programs designed to accomplish specific objectives such as enhancement of self-confidence, development of advanced skills, or learning about the environment.

Each situation is unique, and the program administrator may lack the experience necessary to define the number and qualifications of staff needed for a particular outing. Advice and assistance can often be obtained from administrators or leaders of highly regarded programs with similar content. Contacts with providers of such programs can provide valuable insights and advice, and an awareness of what comparable institutions regard as minimal staff qualifications and participant/staff ratios. In this critical realm, the administrator cannot afford, from a legal perspective, to set standards less stringent than those of other institutions or organizations offering similar programs. As a caveat, one must be sure that the persons from whom advice is sought are highly regarded as leaders in the field. Requesting advice from someone just because his/her program has been in business for several years is risky, as the enterprise may be operating below the standard recognized as acceptable.

Job Announcements, Descriptions, and Analyses

Job announcements are brief notices of position openings with broadly stated duties and general as well as specific qualifications. *Job descriptions* are lists of the general and specific duties expected of the employee. *Job analyses* are descriptions of what the employee actually does, often accompanied with notations on the length of time needed to accomplish each task.

Once needs are identified, general and specific duties and responsibilities can be described for each proposed position—the job description. These "in-house" descriptions may then be summarized to create announcements of openings suitable for posting or publication. The final job analysis often cannot be developed until the staff member is identified and actually performs the assigned duties. Employees have the right to expect their duties to be spelled out on their job descriptions. When the job analysis is not consistent with the job description, one or both should be modified.

Created prior to the search for a new staff member, the initial job description is relatively easy to generate. While the modification of this tentative description into a form suitable for use in a job announcement appears to be a simple process, it in fact deserves careful consideration and often requires the involvement of personnel managers or institutional committees. Hiring processes are often subject to special protocols, conventions, and rules. A small private guide service may be free to describe a position and define criteria and qualifications for employment in whatever manner deemed most likely to achieve results in the particular advertising medium. At the opposite extreme, a publicly-funded educational institution may have to comply with a complex and frequently changing array of local, state, and federal regulations as well as established institutional policies. Fortunately for the program administrator, most institutions have one or more individuals on staff to assist in this process. The operator of a small private business can often obtain advice or assistance from local government agencies. Contact with an established reputable service-oriented business in the area may be useful as a means of identifying which governmental agencies need to be contacted.

Regardless of the extent of regulation and constraint, it is often best to avoid being overly specific when advertising the position. Minimum requirements should be stated clearly; however, care must be taken not to turn away qualified individuals. Before stating minimum requirements as a fixed number of years of a specified kind of employment, or as a requirement for a specific academic degree or certificate, consider whether a person might be acceptable given some alternative combination of experience. The most common way of accomplishing this is to append "or equivalent" to the specific, preferred conditions. When stating salaries or wages, it is often best to state the range and to append with the words "commensurate with experience" (or equivalent wording) if flexibility is possible.

Figure 11.1 (page 222) illustrates an outline for a basic job description. Figure 11.2 (page 223) shows an example of a job description modified from one used by the Northwest Youth Corporation.

In most cases, the final working job description cannot be written until the new employee has been identified. Even in the case of a new "single-purpose" part-time employee, it is often necessary to make some adjustment in the initial job description to reflect the individual's strengths, limitations, interests and time constraints. Failure to adjust is unfair to both the new employee and the enterprise, and it could be a contributing factor to legal action in an ensuing case of negligence.

FIGURE 11.1 A Generic Outline for a Job Description

1. Position Title
2. Dates of Employment
3. Program Description
4. General Description of Job
5. Specific Job Responsibilities
6. Work Conditions and Hours
7. Pay
8. Qualifications
9. How to Apply

Locating Potential Staff

Most positions require highly skilled individuals who can work effectively in unsupervised field settings. The work schedules are often irregular, the hours are long, and the pay is often marginal. Even in a large metropolitan area, there may be only a few potential employees. Fortunately, however, there are reasonably efficient ways of gaining the attention of these individuals. One of the easiest and most productive approaches is to spread the word within the community of participants in the activity in question. For example, a search for a backpacking instructor might be initiated by a few phone calls to one or more backpacking instructors or hiking club leaders in the area. They may offer suggestions and help spread the word throughout the regions. Inform as many dedicated participants as possible. Some may be potential leaders or know of possible candidates. Try posting notices in the clubhouses and newsletters of local hiking or climbing clubs, and in stores that sell hiking equipment. Colleges and universities sometimes have outing clubs or outdoor pursuits courses, and a few offer outdoor leadership training. All are potential sources of staff.

Assessment of Candidates

How can the best candidate be selected from a pool of applicants? The goal is to select the candidate who will be the greatest asset to the program. The person or persons charged with selecting the new employee thus need to be thoroughly familiar with the program as a whole as well as with the specific job description.

Initial screening of applicants is usually accomplished through a review of written applications and references. The efficiency of the screening process depends in large part upon the quality and quantity of information provided by each candidate. The application form and other materials sent to applicants need to be carefully constructed to ensure that the reviewers will have adequate information upon which to base their decisions. If a standard institutional application form must be used, it may be necessary to request specific kinds of additional information in a cover letter or supplemental application form.

Most application forms include spaces for:

Date
Applicant's name
Street address
City
State
Zip code
Work and home telephone numbers
Social Security number (This may not be required until after the hiring process is finished, or it may be required in order to reimburse travel expenses. It depends upon the agency.)
Position applied for
Education (date, institutions, and degrees)
Employment history (dates, employer, position, brief job description, wage or salary may be optional)
Other relevant experience and training (special skills, training or certification, familiarity with outdoor resources in the area; hobbies and interests, etc.)

In some cases, it may also be useful to know the applicant's age, gender, marital status, number of dependents, medical history and physical limitations, driving record, military service and discharge record, and police record. Before requesting any of the above information, it's best to review institutional policies and governmental regulations applicable to the search. There are situations, especially in the United States,

FIGURE 11.2 An Example of a Job Description

NORTHWEST YOUTH CORPS

POSITION: Crew leader
DATES: **Summer:** June-September **Fall:** September-October

PROGRAM BACKGROUND

Northwest Youth Corps (NYC) is a summer education and job training program for high school youth, aged 16-19. Youth crews work on projects for government and industry in a format stressing job skills and environmental education. During the week, crews camp near the job sites, live in tents, and cook their own meals over a campfire or Coleman stove. Weekends are devoted to recreational outings and educational activities.

JOB DESCRIPTION

Crewleaders live and work with their crew in a full-time capacity. They supervise work projects, implement a daily environmental education program, coordinate meal preparation, and transport their crew in a 15-passenger van. They are also required to learn the skills necessary to operate a chainsaw in a safe, efficient manner.

DUTIES AND RESPONSIBILITIES

Corpsmember Supervision:
Crewleaders are responsible for coordinating all the daily operations of a ten (10) member teenage work crew. They delegate responsibilities to crewmembers, maintain crew discipline, and establish crew morale.
Work Project Supervision:
Crewleaders are responsible for the safe completion of assigned work projects and direct corpsmembers with specific attention to safe work practices, proper use of tools, work quality, and efficiency of production.
Recordkeeping:
Crewleaders are responsible for maintaining daily work reports, corpsmember time sheets, written corpsmember evaluations, and a variety of other paperwork.
Education:
Crewmembers are responsible for integrating NYC's environmental education program into each day's work schedule and for assisting in the coordination of an ongoing recreation program.

DESIRED QUALIFICATIONS

Education:
Minimum one year college education in outdoor recreation, forestry, environmental education, resource management, landscape architecture, or a related field.
Experience:
Applications will be reviewed considering all revelant experience relating to youth leadership, outdoor recreation, environmental education, or forestry background. Previous experience operating chainsaws is desirable.
Certification:
A current first aid card and CPR certification is required. Life-saving certification is desirable. Applicants must be able to demonstrate an acceptable driving record during the last three years.

HOURS

NYC is a residential program requiring long days, high energy, and love of challenge. There will be a five-day break between sessions; additional unpaid days off will also be scheduled.

PAY SCALE

In 1991 first-year Crewleaders earned a minimum of $50/day plus meals and potential bonuses. Staff Performance Bonuses ranged from $98 to $165, and Productivity Bonuses ranged from zero to $232.

TO APPLY

Application requirements include a completed application, resume, and references. Interviews will be scheduled as applications are received.

wherein employers are prohibited from requesting certain kinds of information about prospective employees. Where it can be shown that the position demands a specific age, gender, or marital status and is not discriminatory against any individual, it may be possible to require such information. Driving and police records are standard requests in cases where the prospective employee will work with youth, and/or funds, and will be involved in vehicular transportation. Requesting information that does not, or should not, affect the carrying out of the job responsibilities serves no purpose.

The nature and specificity of additional information needed to make a hiring decision varies widely from case to case. In a relatively simple case, when selecting a "single-purpose" part-time employee, all that may be needed is information specific to the particular job. For example, when selecting a backpacking leader who will have no other function in the program, it is often sufficient to have the candidate detail (1) personal experience in backpacking, (2) any courses or training in related skills, and (3) any leadership or teaching experience in backpacking or related activities.

Remember that the written application is only a screening process. Final decisions will be made only after the interview process is completed. When the new employee may be expected to perform a variety of functions, more information is needed about the breadth of a candidate's experience. Figure 11.3 might be used as an aid in screening candidates for a position in a program that includes hiking, backpacking, rock climbing, mountaineering, and rafting. Using such a form can facilitate comparisons and is especially useful when there are many applicants for a position.

At some point in the selection process, it will be necessary to conduct a more thorough assessment of a candidate's knowledge of, and ability to teach each activity. Usually, this more detailed assessment will apply only to those candidates who have met initial criteria and have survived an initial screening of applications and references. There are several possible ways of determining specific abilities. The best method or methods will vary depending upon the nature of the position, the expertise of those conducting the search process, the extent to which it is possible to communicate with the candidates, and the nature and reliability of references. Assessment of a prospective outdoor leader is not an easy task, even for experienced professionals well-versed in the specific activities in question. One of the first things most experienced administrators do is call for help!

Given the importance of making a good decision, and the difficulty of assessing a candidate, references can be extremely important. Nothing is more useful than being able to discuss the prospective employee with an experienced and reputable colleague who has had an opportunity to gain firsthand knowledge of the candidate. A few minutes on the telephone can sometimes eliminate the need for hours of interviews. If the applicant lists an organization as a former employer, it is wise to inquire exactly why the person left the organization. Sometimes it was because of poor job performance!

If references cannot provide enough information, the importance of the interview and alternative assessment techniques is increased. It is often worthwhile to use a written exam and/or a preestablished series of questions in an oral exam or interview format. A written or oral examination is useful if, and only if, the questions are appropriate and if, and only if, the responses can be evaluated by people experienced in activity leadership to which the candidate may be assigned.

It is often best to utilize various types of questions, to assess both objective skill and the candidate's judgement. For example, a candidate for a position as a mountaineering instructor might be asked to draw or construct a 3:1 pulley system suitable for use on a glacier, using standard mountaineering devices and knots. The candidate might then be asked to describe what actions he/she might take in response to a specified set of circumstances. A set of a dozen questions could include one or more dealing with first aid, environmental hazards, clothing and equipment needs, climbing and rescue skills, environmental ethics, group control, and teaching methods, as well as various open-ended questions to shed light on the candidate's ability to use good judgment in resolving complex dilemmas.

FIGURE 11.3 Outdoor Skills and Teaching Experience Summary

Applicant's Name: ______________________

Position Applied For: ______________________

For each of the activities listed below please indicate the extent of your **experience and skills.** Use the following codes:

0. No experience
1. Beginning or novice level
2. Intermediate level
3. Advanced or expert level

Also indicate your **ability to teach** each activity at the beginning, intermediate and advanced levels. Use the following codes:

0. Not qualified to teach at this level
1. Could teach, but no teaching experience at this level
2. Have some teaching experience at this level
3. Have extensive teaching experience at this level

Activities	Personal Experience and Skill in Activity	Ability to Teach levels: Beginning	Intermediate	Advanced
Hiking				
Backpacking				
Rock climbing				
Rafting				

In some cases, it is necessary to observe the candidate in the field. For example, in the absence of reputable certification or references, a potential ski instructor should be observed while skiing and while teaching this activity. Although the candidate's talents might be conveyed in a videotape, direct observation is generally more revealing. While there is always much to be gained from direct observation in the field, circumstances and budgetary constraints may make it difficult or impossible to arrange. For example, it may be possible to arrange a two-hour session in which to assess a candidate's ability to teach skiing, but it may be difficult to assess the ability of a mountaineering instructor unless several full days can be scheduled.

In practice, decisions are usually based upon information derived from the written application, letters of recommendation and telephone conversations with references, interviews with the candidate, and written or verbal examination, supplemented, where possible, with direct field observations.

It is common to identify more than one individual who meets all the performance criteria of the job in question. Unless one person seems clearly more qualified than the others, vis-à-vis the specific job description, the decisions may be based in part upon the possibility of ancillary contributions to the program. For example, in the case of the search for a backpacking instructor, an individual who can also teach kayaking might be selected from a set of otherwise equally qualified individuals if the program happens to need additional help in kayaking.

Staff Orientation and Training

For most administrators, a new or reassigned employee is both a blessing and a burden. The relief felt at finally identifying and hiring the new staff member is followed immediately by a new set of challenges. Even when a long-time employee is reassigned, it is necessary to commit time and energy to orient the person to a new role in the organization. Inevitably, there is a period of inefficiency during which the new staff member is learning how to accomplish the necessary tasks. A new employee must be made familiar with the general structure, policies, and procedures of the organization or institution in addition to the job orientation itself. In some large operations there may be established indoctrination processes and materials. More often, the entire task falls on the shoulder of the individual's immediate supervisor.

Consideration of orientation and training should be part of the initial decision to fill the position. Funding and allocations of supervisory time need to be considered as part of the essential costs associated with the position. When several staff members are hired simultaneously, time and energy can be saved by conducting general orientation sessions for all new employees and volunteers, so that the time required for individual sessions is minimized.

Orientation sessions for new staff generally include detailed surveys of relevant policies and procedures, including payroll issues, employee work rules and benefits, and safety policies and procedures. All of these areas should also be explained clearly in up-to-date documents. Very often, such documents are not kept up-to-date. The need to orient new employees often provides the incentive to review and update written policy statements. Involving the new employee in this process can be worthwhile for everyone. The organization gains from having fresh insight, and the new employee gains a sense of involvement and respect, as well as a better understanding of the rationales supporting policies and regulations.

The amount of specific training that is necessary depends upon the circumstances. If there are other employees doing similar work, it may be sufficient to have the new staff member work with an experienced employee as an assistant or co-leader. When there is no possibility of an "apprenticeship," it is usually best to assign the new leader to tasks that are relatively easy. A new backpacking leader might be assigned to a few small, beginning level weekend group outings before being assigned to a more challenging experience. Even if the new employee has considerable experience as a leader, it takes time to adjust to a new job and to become familiar with new terrain.

Specific skill deficits may be dealt with by providing in-house training sessions if expertise is available. However, it is often more efficient to "farm out" the training, especially if the skills are reasonably standardized. Using outside sources may not cost much more than using in-house personnel, unless the in-house experts have nothing else to do with their time. When employees attend "outside" clinics or when outside experts are brought in to conduct training sessions, new ideas and techniques are made available. In the case of first-aid and CPR training and other safety-related skills, it is often best to defer to the American Red Cross or to other sources of nationally recognized standardized training and certification. In some larger communities, especially in the western states, there are specially designed first-aid courses available for outdoor leaders, ski patrol and mountain rescue personnel. These courses include material relevant to the special needs of people who work in backcountry areas, and may offer Emergency Medical Technician, First Responder, Red Cross Advanced First Aid, or other nationally recognized certificates.

Staff training is an on-going process, and must be considered as an inherent cost of operation of the program. In some cases, all of the costs of staff training, including the costs of maintaining first aid, CPR and other certification are born by the employer. More often, the employer supports a portion of the expense. Typically, training that is specific to the job and not of general value outside of the organization is fully funded by the employer, while the costs of maintaining first aid, CPR and other required certificates are shared or considered to be the employee's responsibility.

Compensation

There is always a need to compensate leaders for the time they spend working with programs. While money is the most widespread form of compensation, it is by no means the only option. The following summary includes some of the most common forms of employee compensation.

Money. It sounds simple enough, doesn't it? In many if not most cases, it's the most efficient and effective form of compensation, and it's the primary form of compensation for most workers. However, as any experienced administrator knows, the actual process of providing monetary compensation is anything but simple. To begin with, how much should the person receive? Should the pay be hourly, daily, weekly, monthly, by salary, or by the job? What is the actual cost of a given rate of pay, given the various taxes, payments to local, state, and federal programs, employee insurance and other benefit costs?

Establishment of a pay scale is a complex process. It's important to consider the pay rates for similar work as comparable organizations in the region, the cost of employee benefits, and the costs of the various governmental taxes and fees that must be paid in proportion to employee wages. The scale needs to allow for reasonable raises over time, as well as for overtime compensation and raises for outstanding performance. Establishing a fair pay scale is difficult, even in the case of an office worker assigned to regular working hours. The process is far more complex in the case of most outdoor leaders, due to the irregular work patterns and long hours. The nature, intensity, and risk levels of the work also vary markedly within the course of a typical assignment.

In some cases, pay is determined in part on the basis of the difficulty and risk level which adds yet another dimension to the puzzle. The following table shows the major tasks associated with operation of a typical basic weekend backpacking course. In the example, it is assumed that the leader is responsible for each of the listed responsibilities. Note that programming, budgeting, scheduling, marketing, registration of participants, and other critical tasks are not included here as they are normally considered to be the responsibility of the program administrators. While some planning and scouting time may be saved by operating multiple similar trips in the same location, the total amount of staff time required is still remarkably large. See Table 11.1 (page 228).

Given the amount of time required to staff even a simple weekend backpacking course, it isn't surprising that many organizations rely heavily on volunteers, at least as assistant leaders. It is also not surprising that in the private sector such courses are expensive for participants. Even at only $10.00 per hour, the costs of direct leadership for a two-day field outing may approach $1,000.00. Administrative costs, insurance, general overhead, transportation costs, and other expenses may well add another $800.00 or more so that each participant must pay $50.00-$70.00 per day just to cover expenses. It is no wonder, then, that many private outfitters, guide services, and schools must charge $100 per day or more (in 1993 dollars) to make a reasonable profit.

Fortunately for the general public, many tax-supported institutions can offer outdoor activities at more affordable rates because of lower overhead and insurance costs. Unfortunately for leaders, many private and public operators keep their costs down by paying very low wages or by paying for only part of the time invested by the leader. Sometimes it is possible to hire capable leaders for evening or weekend outings on a part-time per day or per outing basis for as little as $50.00 per day or $100.00 per weekend (in 1993 dollars). This may be a satisfactory arrangement when the individual is a full-time student or otherwise fully employed. Teachers, for example, may make good reliable part-time employees. If the individual is totally reliant upon income from leadership, however, it is unlikely that he/she can afford to accept the position. Full-time, well-paid employees

TABLE 11.1 Hours to be Considered for Compensation for a Typical Weekend Backpacking Outing

	LEADER HOURS	ASSISTANT LEADER HOURS
Pre-trip planning [1]	4	0
Pre-trip scouting [2]	12	12
Pre- and post-trip meetings [3]	6	4
Group gear preparation [4]	1.5	0
Personal gear packing	2	2
Conduct of outing [5]	24	24
Group gear cleaning, repair and storage	1	1
Follow up evaluations and reports	1	0.5
Personal gear cleaning, repair and storage	2	2
TOTAL	**53.5**	**45.5**

[1] Includes planning, vehicle reservations, generation of course descriptions, agendas and other handouts, etc. Repeated trips on the same basic plan require less time.

[2] Assumes ability to scout a two-day beginning trip in a single day by a fast, fit pair of leaders. Repeated trips to the same site usually do not require scouting.

[3] Assuming two pre-trip meetings at 1.5 hours each, one post-trip meeting at 1 hour, and set-up and follow-up time.

[4] Assumes a need to organize a moderate amount of group gear. It is assumed here that personal gear is provided by individual participants.

[5] Leaders are responsible for the group from time of assembly until return to town. In addition, leaders must usually arrive at least 30 minutes early to prepare vehicles and gear, and after the outing they must return vehicles and, in some cases, transport participants home. Therefore, the 12 hours per day assumed here are minimal. Some organizations pay for an additional 12 hours of evening and night duty at a reduced or "on-call" rate.

are generally the most committed and reliable personnel. The next best alternative is a part-time employee who has a secure full-time paid position in the community. When students or other members of transient populations are hired on a part-time basis, frequent changes of staff can be expected, with the resultant costs of training and lack of continuity.

Obviously, all of the above issues must be viewed with one eye on the budget. In most cases, all costs of operation must be borne by the participants, at least in the private sector. Unless some other source of income is available, market forces often lead to an uneasy compromise wherein participant fees are uncomfortably high, and staff wages are uncomfortably low.

Sometimes there is an advantage to contracting or subcontracting for the needed services. As a contractor, the leader receives no direct benefits other than a fee, which is often greater than the wage that would have been received as an employee, and the fee seems larger still since no taxes are withheld. The employer enjoys lower costs and may be afforded some degree of protection from liability for the actions of the contractor, especially if the contractor is insured. While such an arrangement may not be in the best long-term interests of the contractor, it may provide considerable short-term advantage. The primary stumbling block may be liability insurance. Unless the program's liability coverage automatically extends to contractors, the contractor may have to obtain his/her own insurance. In many cases, the costs of obtaining adequate coverage exceed any monetary advantage gained by contracting.

Health Insurance and Retirement Benefits

Health insurance and retirement programs are valuable benefits, especially in the United States. Even in the majority of developed nations, which have national health-care plans, there are usually a variety of supplemental health and retirement programs that can be provided for full-time, and in some cases for part-time employees. The typical full coverage group health plan in the U.S. is very costly; however, it is a benefit needed and appreciated by employees. In many cases, employers are required by law to offer certain health insurance and/or retirement benefits. Employers should consult with the appropriate local and state agencies to determine what rules apply given the size and nature of the organization.

Training Opportunities

As discussed earlier, some or all of the staff training sessions may be paid for by the employer. Whether or not training is viewed as a benefit depends upon the employee's attitude, company policy, and the quality and scheduling of the sessions. Well-run, valuable sessions may be appreciated by employees even if they have to pay part or all of the costs. They may consider being allowed to participate as a benefit of employment. On the other hand, less exciting sessions may be viewed as unpleasant additional burdens.

The activities themselves are ongoing "training sessions" for the leaders. For many, the opportunity to improve activity and leadership skills is a prime motivator and benefit of employment. By providing an occasional training session, clinic or seminar, the employer can help maintain enthusiasm for learning. It is a good idea to encourage post-trip meetings of groups and leaders, wherein the leaders can solicit feedback from the participants. It is especially useful to follow the full group post-trip meetings with a leaders-only meeting, to allow uninhibited exchange of ideas and constructive criticism. Such meetings can be of great value in upgrading program quality, leadership ability, esprit de corp and job satisfaction.

Equipment, Food, and Transportation

Most outdoor pursuits are highly gear intensive, and most take place at some distance from town. Gear, food, and transportation are all potential employee benefits. There is great variation in the way these items are dealt with in different programs. Transportation to and from the outing site is almost always provided at no cost to the leader. When carpools are used, the leader is compensated fully for use of his/her vehicle, or rides in someone else's vehicle at no cost, with expenses picked up by the program or by the pool of participants. Gear is sometimes provided. For example, ropes, carabiners, helmets, and other specialized gear are almost always provided for rock climbing and mountaineering participants and leaders. Backpacking leaders may be offered a backpack, tent, sleeping bag, and stove. Equipment is usually provided when it is clearly needed by the leader in order to conduct the course, or when the leader will be working enough to incur significant wear and tear on personal equipment. Such equipment usually is not considered employee property, and remains with the company on termination of the employee. Sometimes, when it is not needed by the program, gear belonging to the organization may be borrowed by employees. While appreciated by employees, this can be a costly "can of worms" for the employers. The practice is not recommended unless strict guidelines are applied.

Clothing is rarely provided. Even when uniforms are required, as is common in ski schools, for example, special group or even wholesale prices may be arranged, but the costs are paid by the employee. The clothing is maintained by the employee and is retained as personal property once employment has ended. There are exceptions to the rule, especially when a uniform is distinctly marked and cannot be modified for "civilian" use. Such clothing may be paid fully or in part by the employer and is kept by the employer for reuse by new employees.

Some programs provide the leaders' food. As a general rule, if the program provides the food for the participants, the leaders are provided with food as well. In such cases, leader food is a benefit paid for out of the program budget. When food is not provided for participants, it is not usually provided for leaders. Compensation may be provided in the form of a "per diem" allotment to cover food costs, or no compensation may be provided based upon the rationale that the leader would have to provide his/her own food in town anyway.

Recognition and Praise

Everyone appreciates a pat on the back. Recognition of work well-done can take many forms, from informal comments to formal presentation of awards. Exceptional or newsworthy accomplishments by staff may be showcased on bulletin boards, in newsletters, in local newspapers, or, in some cases, on television. Many outdoor pursuits activities have exciting visual potential. Often a local TV station can be enticed into doing a human interest or sport story featuring an outstanding employee or program.

Other Compensation

Some of the most obvious employee benefits are often forgotten. It might be worthwhile to review the section on the values of outdoor pursuits, in Chapter One. The physical, philosophical and aesthetic benefits that attract participants to outdoor pursuits are no less attractive to leaders. At least when the weather is good and all is going well, many an outdoor leader has secretly chuckled at the thought that he/she is being paid to do what others must pay to do!

Volunteer Benefits

Essentially all of the benefits available to paid employees are available to volunteers, except, of course, money. In many cases, volunteers can claim a "benefit" not available to paid personnel. Many extremely valuable programs and services simply could not exist without volunteers. In such cases, volunteers can rightfully feel proud, as they are unselfishly helping others by providing services and skills that would otherwise be unavailable.

It is important to appreciate volunteers as individuals, and to understand their particular needs and motives for wanting to serve. It is also important to maintain a clear focus on the needs of the program, in particular vis-à-vis program safety and quality. It may be tempting to try to accommodate an enthusiastic volunteer when in fact there is no real need for that individual's particular set of talents. In the long run, it is always best to maintain high standards and expectations for performance. Whether paid or not, staff morale is very much determined by the extent to which there is a real basis for pride in the quality of the program. Like paid personnel, volunteers appreciate clear definitions of responsibility, ongoing feedback, and recognition for their accomplishments.

Supervision of Staff

Leadership is probably the single most important factor in the success of an outdoor recreation program. For this reason, an outdoor-recreation administrator should spend the majority of his/her time working with, and for, the leaders of the program.

Leaders are a resource, and what a program receives from this resource may depend entirely, on the administration and the supervisor.

The key is good supervision. Many times, it seems that a supervisor in actuality becomes a "snoopervisor," which in general fouls communications and inadvertently has a bad effect on the program. Among all personnel, rapport should be such that there is little change in the program (or the leader's feelings) when supervisory/administrative persons are at the site. Too often, supervisors are looking only for what is wrong rather than what is right.

In an age when there is the perception of "administration pollution," there are always persons who appear (in an effort to show their importance) to question each small facet of a program. This action, commonly called "nitpicking," is one of the best ways of robbing leadership of the enthusiasm and resourcefulness which are so necessary to outdoor programming.

By nature, outdoor leaders are individualists. This is good. In the outdoors, these leaders have learned to be self-reliant; they have tasted the freedom and naturalness of the nonsynthetic world. When a leader is confronted by an administrator who appears to speak only from books, the leader may lose his/her drive and enthusiasm about the program very quickly. When people are hired to do jobs, they should be allowed to perform them. They need administrative support and supervision but, assuming that qualified leaders were hired in the first place, they should need little or no administrative interference.

Scheduling

Scheduling refers here to the process of setting dates and times for activities and events. Agendas, as specific plans for the content and timing of meetings, outings and events, are discussed in the section on tactical planning in Chapter Fifteen. Scheduling is critically important to the success of any program. Outdoor pursuits are, in general, very time intensive. Participants must find room in their personal schedules for pre-trip meetings, acquisition and preparation of clothing and equipment, outings, post-outing repairs, cleaning, and storage. Planners must be highly sensitive to the lifestyle and preferences of potential participants. Vacation patterns, school calendars, work schedules, and potentially competitive, or conflicting, events have to be assessed and considered. The situation is compounded by resource access. River levels, snow levels, road conditions, weather conditions, usage levels, management controls, and permit stipulations are only some of the considerations surrounding access to resource lands and waters. As if this isn't enough confusion, there must be enough qualified staff available, and facilities, transportation, and lodging must be available. The scheduler must often juggle half a dozen variables when seeking the best possible time for a given event or activity.

Most outdoor pursuits, as leisure activities, must be scheduled at times that do not conflict with, or interfere least with, those activities and responsibilities that a given participant sees as obligations. For this reason, unless the prospective clients are retired, longer events or activities must be scheduled during vacation periods. Short excursions may be scheduled on weekends, or during the summer, for students and many teachers and faculty. Meetings or other in-town events are generally held on week nights, as staff are often busy leading field excursions on weekends. There is no one best evening. Monday through Thursday evenings are the most frequently used for classes and meetings, with Friday and Saturday evenings customarily committed to social events. Thus, a purely social, recreational event usually has a better chance of success on a Friday or Saturday evening than on an earlier night, while a clinic, course or business meeting is not likely to go over well on either Friday or Saturday evening. For various reasons (such as religious observances, family activities, school work, and relaxation), Sunday evening is rarely used for any kind of meeting. There is a general reluctance to commit the last evening of the weekend to any structured event.

If participants may have a need for, or interest in, more than one activity, this must be considered when setting the order in which events will occur. Failure to do so inhibits the participant's ability to enroll in multiple events, and so reduces enrollment potentials for the sponsor. For example, in a large program with multiple offerings, a beginning backpacking outing should be scheduled before an intermediate backpacking meeting, and ideally before any other outings for which the beginning backpacking outing is a prerequisite. The timing is important, as well as the sequence. It is best, for example, to leave at least one or two weekends between two outings in a sequence, since few people can schedule two weekends "back-to-back." Especially when the activity is physically or psychologically demanding, it is important to give the participant a chance to rest, recover, reorganize gear, get caught up on chores, and become mentally ready for a new adventure.

Evening preparatory sessions should be scheduled far enough in advance of an event so that everyone has an opportunity to do whatever is necessary prior to the event, be it studying, exercising, skill practice, gear acquisition, or breaking in a new pair of boots. Meeting times set too early interfere with evening meals, but meetings set too late may be unproductive, because retention diminishes as people tire. Most evening meetings are scheduled to start between 6:30 and 7:30 p.m., and usually last no longer than two hours. It is often best to limit the total number of sessions by extending them as much as possible. For example, it is usually easier and more efficient for both the instructor and the participants to schedule two long evenings than four short evenings. Beginning instructors are invariably amazed by how long it takes to cover what may seem like a short list of topics. Even experienced and efficient instructors usually prefer having several hours with a group before heading for the field. Nevertheless, keep the attention spans and personal time constraints of participants in mind. If a meeting is scheduled for two hours or more, it is likely that some people will avoid it altogether, and it takes a particularly adept instructor to maintain the interest and attention of any audience for that long.

Registration

Registration, the enrollment or "signing up" of clients, is an integral part of any program. It is important from a business and clerical perspective; it influences client attitudes towards the program; and it can represent a major cost in both time and money. From a business perspective, registration is generally the point at which fees are paid or at least committed to by the clients. It is at this point, if not before, that clients need to be made aware of any and all terms and conditions related to payment. In essence, this is the point at which a contractual agreement is being struck between the sponsor and client. As in any contract, it is wise to have the particulars reduced to writing. Figure 11.4 illustrates a typical registration form.

Registration is usually accomplished, by telephone, by mail, or in person. Each has its advantages, and, in some cases, it may be best to use a combination of approaches. Normally, the choice is based upon a desire to maximize the number of clients given the resources available. Many small businesses utilize all three methods, allowing clients to enter the program by whatever means is most convenient for them. Usually at least some exchange of paperwork is necessary, by mail or personal contact. Large institutions, such as colleges and community recreation departments that provide multiple offerings to people living in a limited geographic area, may conduct a well-advertised "arena" registration at a centrally located facility.

The following suggestions may help. Remember that whichever techniques are used, a friendly and professional approach, well-designed forms, and carefully written documents pay dividends in efficient and, most importantly, in client perceptions of the program.

Telephone registration is becoming increasingly popular, due to improved technology. Incoming WATS, "800" service, FAX machines, and a host of computerized telephone enhancements and services have increased the efficiency and, at least for clients, made telephone use more attractive. Many large institutions employ sophisticated interactive systems that allow the caller to "punch in" codes on a touch-tone telephone, and even to pay using various credit cards. Such systems can often keep track of group sizes, limit enrollments, and convey prerecorded messages in response to preestablished caller input. While highly efficient for some applications, these "high tech" systems lack the important element of real-human intervention. In normal telephone registration, the caller can speak to someone who can, ideally, answer questions and perhaps allay some anxiety. A good "fit" between clients and programs is essential, and there is no good substitute for conversation with a knowledgeable person. Usually,

FIGURE 11.4 An Example of a Registration Form

Name: ______________________ Age: ________ Gender: ________

Address: ____

\# street city state zip code

Phone (home): ______________ Phone (work): ______________

Class Name	Dates	Times	Place	Instructor	Class Fee

Total Due: ________ Amount Paid: ______ (cash, check, or charge): ________

Balance Due: ____________

SIGNATURE: ______________________ DATE: ____________

SIGNATURE: ______________________

(parent or guardian if under 18)

a phone call only serves to reserve a place in an activity, and it must be followed by an exchange of paperwork in the mail unless the person can come to the office within a day or two. Even when the call taker is highly knowledgeable and able to answer the caller's questions fully, it is important to provide the vital information in written form.

Registration by mail may be initiated by the client, for example, by sending registration forms clipped from a local newspaper, along with payment. More often than not, it is initiated by the sponsor in response to the client's telephone call or letter of inquiry. Mail-in registrations can be costly if not arranged carefully, in part because of the delay inherent in mailings. Hopefully, bulk mailing rates can help keep costs down in large programs.

Registration in person, whether one at a time or in an arena with several hundred people, offers the best chance to ensure that the client knows exactly for what he/she is signing up. It also gives the staff a chance to assess the client more effectively, and saves postage and telephone costs. One-to-one contracts are ideal from a communication standpoint, if the sponsor's representative is thoroughly knowledgeable. On the other hand, such contacts are very inefficient for other than very small programs, as similar messages and processes must be repeated at considerable expense in time. At the opposite extreme, mass registration is very efficient in terms of time spent per client, at the expense of disallowing relaxed and thorough discussion of issues. If the large group registration session is for closely related activities, it may be possible to begin the session with program descriptions and a question and answer period. In a diverse program, any discussion would have to be limited to common issues and registration procedures. The components of a successful arena registration are (1) adequate numbers of registrars, (2) availability of information (it must be possible to answer all important questions quickly), and (3) simplicity.

One tempting way to avoid long lines is to provide a form for each potential client, on which they can record their name, address, phone number, and any other necessary information, and list the courses, activities, or events in which they wish to register. The problem with this system involves the inadequacy to monitor enrollments; some people would leave thinking they are enrolled, when in fact the offering was full. Having people sign up for specific activities takes somewhat more time, but it allows those who are unable to enroll in a given activity the chance to select an alternative activity in which space is still available.

In this process, time can be saved by using the form mentioned above so that the client doesn't need to record the data repeatedly should he/she enroll in more than one activity. Registrars for each activity can initial the form and note the activity and fee, for assessment and payment or billing at a separate desk. Statements of terms and conditions, activity descriptions, schedules of events, agendas, health forms, releases and acknowledgements of risks, parent/guardian release forms, and a clear statement of refund policies should be provided to each participant at this point.

Whatever technique is used for registration, it is important to gather enough information to serve the needs of the client and of the program. In addition to the obvious information (name, address, and home and work telephone numbers), it may also be useful to record the client's date of birth, social security and driver's license numbers. Parent or guardian and/or emergency contact information is handy to have in the registration files, even if it is also included on the health form.

For most organizations, the greatest challenge is that of drawing in enough clientele. For this reason, it is very helpful to know how the client initially learned of the program and to know as much as possible about what inspired participation. Such information is invaluable in planning future marketing schemes. Knowing the person's age and specific interests can help when planning programs and in targeting mailings or other marketing schemes.

Registration does not guarantee that the enrollee will participate. As anyone who has ever arranged group events is all too aware, it is common for people to sign up and then not participate. The range of reasons runs from illness or accident to unpredictable time conflicts to loss of interest, excess anxiety, or forgetfulness, to name just a few possibilities. The result can be unnecessarily costly and frustrating unless care is taken to establish fair policies and convey them in writing to clients in advance of registration. There are two principal areas of concern. The issue of most immediate interest to the nonparticipant, and to the organization as well, is the fee. There are many possible schemes for determining what portion of the fee, if any, will be refunded. Most organizations establish a schedule of refunds based upon the time of leaving the program and the reasons for leaving. Whatever schedule is applied, it is far easier and more comfortable for the organization to hold a deposit or part of a fee if the client was warned, in writing, at registration.

The second area of concern is the possibility of potential client loss in the program, activity, or event. Although little can be done about this at the last moment before an outing or once well into a progression, it may be possible to enroll someone else to fill the vacant place if the absence occurs very early in the program. Care must be taken, however, to avoid adding someone who will be handicapped or less safe due to having missed one or more meetings, lessons, or training sessions. One way to avoid wasting a space is to maintain a "waiting list" of potential alternative participants. When the first meeting of a program is mandatory or very important, those on the waiting list may be required to attend. Absentees may then be replaced immediately from among the alternates in attendance. This is an especially useful tactic in the realm of outdoor pursuits, wherein the material addressed in pre-outing sessions is important to safety, and being part of the program from the beginning helps the participant develop a sense of full membership in the group enterprise. This, of course, is not feasible in the program where clients come from many widely separated geographical areas.

Budgeting

Needless to say, every agency, organization, or business is different in regards to the structure and dimensions of its budget. Furthermore, while the owner/operator of a small guide service must, of necessity, be in complete control of his/her budget, a leader (or even administrator) of programs imbedded in large institutional structures may have little knowledge, much less control, of the budget. The small business operator would probably like to spend less energy dealing with finances and more time doing other more appealing tasks, while those at the other extreme may be frustrated by the lack of understanding and control. At least a partial solution for both sets of people may be to conduct a careful review of the existing budget, using as many sources of information as possible, while being as objective as possible.

Budget planning is usually too complex to do strictly in one's head. It is not unusual to see budgets for modest programs that occupy several pages. Having a written budget is very useful from a planning perspective, and a post-event budget summary is an invaluable aid in accounting for expenses, tax form preparation, and in planning similar future events. When constructing a budget form, consider the various end uses of the information, including the requirements of accountants, the IRS and other taxing entities, and utility for future planning. Especially for the small business, a well-constructed form can save precious time. Many computer software manufacturers make programs that are specially designed for these purposes, and most good spreadsheet programs can be used to create budget plans that are easy to use. Such programs are especially handy for planning, as predictions can be entered easily, with almost instantaneous display of "bottom lines." All such programs also allow quick and easy generation of hard copies, and many have interactive word processing capability so that the budget may be modified and included directly in reports.

Data base programs are particularly useful for keeping track of purchases and expenses, especially when there are many expenditures over the fiscal or tax year. Data bases allow each entry to be described, dated, and coded so that each category of expense can be separated, totalled, and printed out in a few minutes.

There are many expenses that might be incurred in operating an outdoor recreation business. The following list is not all inclusive, and, for any given business, some items may not apply. Small business operators especially may find it convenient to list or group the various items in a way that is compatible with the requirements and forms of the IRS or other taxing entities. Note that in some cases (such as for a facility), the expense listed for a particular program may represent only a portion of the actual facility's expenses, or none at all, depending upon the extent to which the program is expected to share the burden of those expenses.

A Sample of Possible Business Expenses

1. Salaries
    - Administrative
    - Staff
        - Full-time
        - Part-time
    - Secretarial
    - Contracted
    - Other (lawyers, CPAs)
2. Taxes
3. Withholding
    - Federal
    - State
    - Local
    - FICA (social security)
4. Insurance
    - Workman's Compensation
    - State Accident
    - Business liability, property
    - Employee liability, accident
    - Volunteer liability, accident
    - Participant, accident
5. Facilities
    - Buildings and offices
    - Pools and recreational facilities
    - Maintenance and supplies
6. Utilities

7. Office Expenses
    - Telephone
    - Postage
    - Printing
    - Supplies
    - Equipment
8. Marketing and Promotion
    - Advertisements
    - Materials
9. Equipment
    - Purchase
    - Rental
    - Maintenance and repair
    - Replacement
10. Publications
    - Trade journals and magazines
    - Books and reference materials
    - Maps
11. Transportation
    - Licenses
    - Purchase of vehicles
    - Rental of vehicles
    - Tickets and fares
    - Safety equipment
    - Maintenance and repairs
    - Vehicle replacement
    - Gas and oil, etc.
    - Tolls and fares
12. Accommodations or Resources
    - Lodging and campsite
    - User and access fees
13. Food
    - Staff
    - Participant
14. Miscellaneous expenses
    - Incidental costs
    - First aid materials
    - Refunds

Other possible expense categories include livestock, capital improvement, and investments.

Income may come from a number of sources. In a small business, the situation is often very simple in that income may come only from client fees. In larger private organizations and in public institutions, income may also be derived from several sources. The income side of the ledger may be quite simple or may be set up as follows:

1. Investment
2. Fees
3. Sales
4. Refunds or rebates from manufacturers
5. Gifts
6. Grants
7. Donations

In the most simplistic sense, the "bottom line" can be calculated by subtracting the sum of all expenses from the total revenue, taking care to account for any refunds or other hidden variances. In practice, however, it is not always easy to interpret the "bottom line" in a budget, especially when its scope includes overhead costs and other expenses not directly incurred in carrying out the event or program. In setting up the initial budget, it is recommended that both small and large organizations seek the aid of qualified tax consultants. Even if the taxes are subsequently calculated by the program administrator, advice is usually necessary to determine deductions, expenses, "costs of doing business," overhead, and other items that may vary from case to case. Then the real situation can be grasped, and the true effects of changes in fees, income, or expenses can be comprehended. As a final thought, remember that a budget is a plan that may need to be modified. Anyone who has ever planned as simple a venture as a weekend at the beach (or even a trip to the market!) knows that it is wise to plan for contingencies.

Evaluation

Every program has goals or objectives, whether or not they are formally documented. Evaluation is the process of assessing the extent to which objectives were achieved and goals were approached. Evaluation may be formal or informal. Informal evaluation occurs throughout the program, as leaders and staff interact with the participants and observe their responses to each activity, event, or experience. Discussions of these observations at staff meetings can generate ideas for program improvement and reinforce effective elements of the program. Formal evaluation processes include the use of evaluation forms and structured discussions. See Figures 11.5, 11.6 (page 238), and 11.7 (page 239). In every case, it is important to solicit the views of the leaders, staff, administrators as well as the views of the participants.

Few programs are driven solely by participant interests. While participant satisfaction is almost always an important consideration, in many cases there are program goals, objectives, policies, and philosophical directives that must also be weighed heavily even though they may be at odds with attainment of maximal immediate enjoyment by participants. This is common in programs that have educational or therapeutic objectives, wherein the success of a program may be measured in terms of institutional perceptions of what best serves the long-term interests of the participants. If the participant is unaware of or unable to recognize and appreciate the long-term benefits of an experience, he/she may be less satisfied with the program. Thus, an administrator or leader might evaluate a program as having been highly successful, while a participant might express serious reservations. For example, an overnight camping trip with a high school biology class might be judged wildly successful by the faculty if all of the teaching objectives seemed to have been met, and the students learned basic camping skills. Some of the students, however, might regard the outing

FIGURE 11.5 Outdoor Recreation Program Evaluation Form

ACTIVITY: ____________________

DATE: ____________________

We appreciate your comments. With your help and input, we can make improvements in our program.

1. Did you enjoy the program? yes ___ no ___
   Comments: ____________________
2. Did the program fulfill your expectations? yes ___ no ___
   Comments: ____________________
3. Please indicate your response below:

	EXCELLENT	GOOD	FAIR
Leader's knowledge of the material			
Leader's skill in activity			
Leader's teaching ability			
Location of activity			
Pace or speed of activity			
Length of program			

   Comments: ____________________
4. How did you hear about this program? ____________________
5. Would you recommend this program to a friend? yes ___ no ___
   Because: ____________________
6. Other comments: ____________________
7. Ideas for future trips? ____________________

FIGURE 11.6 Outing/Clinic Evaluation Form

OUTING/CLINIC TITLE: ______________________

DATE: ______________ SEX: M ___ F ___

Please help to improve the quality of our program by filling out the evaluation form and turning it in to a staff member. Thank you.

Please rate the Outing/Clinic from EXCELLENT (5) to POOR (1)

Instructors:	5	4	3	2	1
Knowledge and skill level					
Teaching ability					
Organization and efficiency					
Attitude towards participants					
Overall rating					

Comments: ______________________

Overall Program:	5	4	3	2	1
Pre-trip information					
Travel arrangements					
Accommodations (if applicable)					
Overall rating					

Comments: ______________________

as a total failure, having had no chance to swim, little free time, and not enough bug repellant. Both viewpoints are important and should be taken seriously. This situation is not unusual, and it points to a need for better communication between, in this case, the faculty and students.

Poor evaluations by participants result when the experience did not meet their expectations. Poor evaluations by representatives of the organization result when objectives, which represent the expectation of the organization, are not achieved. When the perceptions of participants vary markedly from the perceptions of administrators, leaders, and staff, the usual cause is poor communication in the initial phases of the program. Good, early exchange of ideas can create realistic expectations by either changing participant preconceptions or by inspiring more realistic goals and objectives. Careful analysis of input from all sources may identify ways in which the objectives may be modified without diminishing their value, or ways of achieving exciting objectives, so that participant satisfaction is increased without reducing the overall value of the program.

Open evaluation processes lead to better programs, and, perhaps even more important, to a sense of involvement, personal respect, power, and control by all who contribute. Too often, administrators, leaders, and staff all dread the evaluation process. Having invested time and energy in designing and carrying out a program, it is only natural for the planners to wish for total success and, at the same time, to fear failure. Negative evaluations imply failure—and that hurts. Most people thrive on praise and dislike criticism in any form. Administrators don't like to hear that the goals and objectives

FIGURE 11.7 Class Evaluation Form

NAME OF CLASS ____________________

INSTRUCTOR ____________________ DATE ____________

Put a circle around the word that represents your objective judgment of the course or the instructor. Your response is confidential. A summary of all student evaluations in this class will be provided to the instructor.

1. Instructor's interest and enthusiasm for teaching the course

poor	fair	good	very good	excellent
seems personally uninterested; does not inspire learning	*moderately interested and enthusiastic; not especially stimulating*		*has sustained interest & enthusiasm for the course*	

2. Preparation for class periods

poor	fair	good	very good	excellent
preparation usually haphazard	*usually well prepared*		*always well prepared*	

3. Organization of the course

poor	fair	good	very good	excellent
little or no evident organization	*well organized but room for improvement*		*very well organized from start to finish*	

4. Presentation of subject matter

poor	fair	good	very good	excellent
students bored; haphazard use of class time; voice and expression are inadequate			*keeps students interested; voice clear and expression distinct; class time well used*	

5. Attitude toward students

poor	fair	good	very good	excellent
shows no personal interest in students; indifferent			*friendly, courteous and considerate*	

6. Course objective: What to learn was clear

poor	fair	good	very good	excellent
no attempt was made to define course objectives			*objectives were clear from the beginning*	

7. General ratings of the course

poor	fair	good	very good	excellent
learned very little			*good solid course; I learned much*	

8. General rating of the instructor

poor	fair	good	very good	excellent
	not bad, but could be better			*an exceptionally good teacher*

9. Facilities

poor	fair	good	very good	excellent
facilities were not appropriate		*adequate*	*facilities were suited for this particular class*	

Comments: (On the back please comment on significant strengths and weaknesses of the course. How can this course be improved?)

they established were not appropriate, or that their planning was inadequate. Leaders and staff don't like to learn that certain activities were not successful, or that their leadership was flawed. It is well to remember, however, that (1) it is simply not possible to please everyone equally in any group situation, and (2) criticism is free advice. The advice may or may not be good advice, but the price is right!

Whether or not a program is successful in the long run is usually dependant upon the quality and value of the services that are delivered. Definitions and perceptions of quality and worth change constantly, so the successful program must be continually assessed and adjusted. A team approach can help administrators, leaders, and staff maximize program potential and minimize unnecessary anxiety. The keys to success are mutual respect and understanding and a sense of common purpose. Mutual respect and understanding are grounded in good communications, and one of the best ways to facilitate communication is for a key member of the team to take the lead.

For example, an administrator might begin a post-trip evaluation session by saying, "Let's see what we can do to improve next month's program. It seems from the evaluations that some of the objectives I set need to be changed or tossed out altogether. Can you help me?" This sets a tone that is conducive to constructive action. In such an atmosphere, the leader whose teaching style has been criticized may feel comfortable asking for advice. In a post-trip session with participants, informal group evaluation can be instigated by the leader, who might say to the group, "Let's talk about how the trip went for you. We want to do a better job for the next group, so you can do us, and the next participants, a big favor by giving us your honest appraisal of your experience."

It is often useful to focus discussions first on general issues, such as the location and agenda, then on the leadership. It is particularly valuable, if time allows, to focus one by one on the leaders in order to extract as much feedback as possible. By making it clear that every staff member, including the leader, is still learning, more direct and honest feedback is encouraged. To facilitate free exchange of ideas, the listeners should take care to avoid defensive responses, but rather to express appreciation for the advice or idea. Later, after all of the group members have had a chance to speak freely, the staff may wish to explain why a particular action was taken, but this should be done only when necessary to correct serious misunderstandings on the part of the group. The post activity evaluation process is invaluable to the leader as well as to the organization, which benefits from the development of leader competence. Written evaluations can be used and are especially valuable when employed in conjunction with the verbal evaluations of the post-trip meeting process.

Ideally, the evaluation process should include post-trip verbal discussion by the group, written evaluations by group members, verbal discussion in a leaders-only post-trip meeting, and written evaluations of each leader. By "leader" we refer here to anyone who participated in a leadership capacity, including leaders, assistant leaders, drivers, and any other involved staff. For example, leaders and assistant leaders in a program may participate in group post-trip evaluations, meet in a leaders-only session to provide intensive feedback for every leader, and then receive a written evaluation from each head leader. Figure 11.8 is an example of a form for leader "peer evaluation" that includes both structured and open-ended elements.

The leaders are asked to arrive at the leader meeting with written evaluations of every leader with whom they worked. Distributing these evaluations after, rather than before or during, the meeting, facilitates communication by avoiding the tendency of leaders to become fixated on topics and issues in the written evaluation.

Post-trip leader meetings are discussed in greater detail under the section on bringing closure in Chapter Sixteen, "Leadership in the Field."

Program and leader evaluation requires a significant commitment of time and energy at a point when it is tempting to put the past behind and to focus upon immediate and future needs. Experienced administrators and leaders know, however, that the rewards of regular, thorough evaluation far outweigh the costs.

FIGURE 11.8 Post-Activity Leadership Evaluation Form

Activity: ______________________ Date of Activity: ______________
Date of Evaluation: ______________________________________
Evaluator: ______________________ Evaluator's Position: ______________
Subject: ______________________ Subject's Position: ______________

OBJECTIVE EVALUATION:

Subject's:	POINTS 1	2	3	4	5
1. Skill level in the activity					
2. Experience/general knowledge of activity					
3. Physical condition/ fitness					
4. Appropriateness of, and use of clothing and equipment					
5. Performance of assigned tasks					
6. Teaching and communication skills					
7. Apparent judgment and maturity					
8. Initiative and energy level					
9. Performance under stress					
10. Quality of summary write-up					

Rating System:
1 = Inadequate for leadership of this activity
2 = Adequate for leadership of this activity at assistant leader level
3 = Adequate for leadership of this activity at leader level
4 = Excellent and consistent with highest professional standards
NA = Insufficient basis for estimating competence or performance

SUBJECTIVE EVALUATION: ______________________________________

Note:
The purpose of this evaluation is to provide any and all insights that could be of value to the leader. Please be as direct and honest as you would appreciate in an evaluation of yourself!

Summary

Basic administrative functions include programming, staffing, scheduling, registration, budgeting, and evaluation. Those considering administrative aspects of the outdoor pursuits field will be called upon to be familiar with the details of each of these topics and to be able to plan and modify them concurrently. Programming functions include developing various goals and objectives, incorporating various program formats, and following both individual-centered and group-centered principles. Staffing includes developing job descriptions and announcements, and locating, assessing, training, supervising, and compensating staff. The processes of scheduling and registration include many activities designed for the convenience of potential participants as they make arrangements to enroll in the outdoor pursuits program. Budgeting is a plan for income and expenses designed to result in an even financial balance or a net gain for the organization. Evaluation of the program from the point of view of both the participant and the organization is a process of documenting the extent to which the objectives were achieved and the goals approached. These administrative functions are basic to the operation of any outdoor enterprise.

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