

# Outdoor Leadership

*Theory and Practice*



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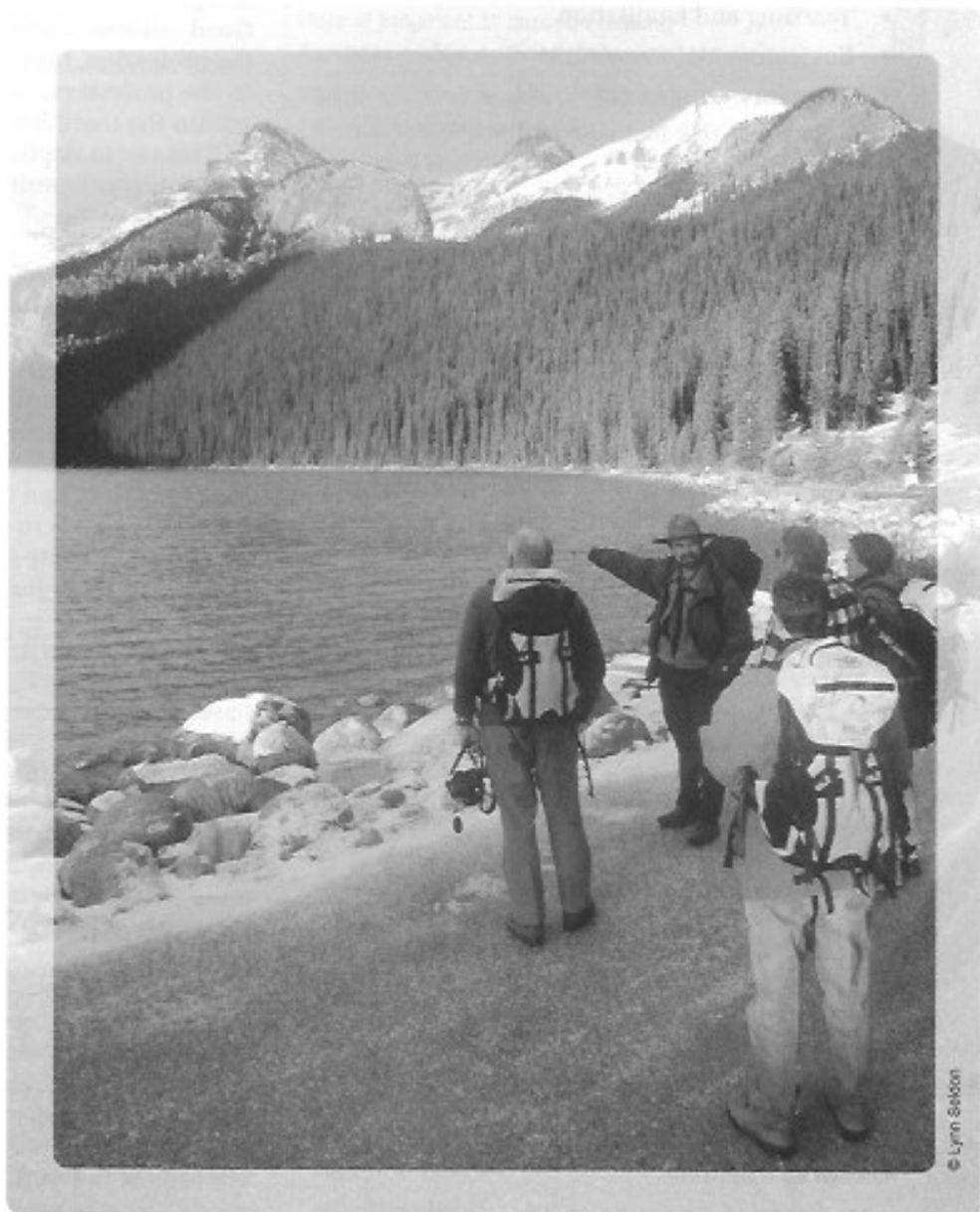
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# Introduction

## BUILDING CORE COMPETENCIES

“There are hundreds of combinations of character, personality, and knowledge that make for good outdoor leadership. . . . For our purposes, leadership is defined as the ability to plan and conduct safe, enjoyable expeditions while conserving the environment.”

—Paul Petzoldt



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This text takes a core-competencies approach to understanding the practice of outdoor leadership. This approach is not new; it was developed through the collective efforts of a number of leaders in the field during the past 25 years (Priest and Gass 1997; Priest 1984; Raiola 1986; Buell 1981; Swiderski 1981). The authors of this text have identified eight **core competencies** essential to the practice of outdoor leadership:

- Foundational knowledge
- Self-awareness and professional conduct
- Decision making and judgment
- Teaching and facilitation
- Environmental stewardship
- Program management
- Safety and risk management
- Technical ability

These competencies provide the essential framework for the text. They illustrate the multifaceted nature of outdoor leadership.

## Core Competencies

This section of the text outlines and describes each of the core competencies (see figure 1.1). It also illustrates the way in which the competencies serve as a basis for the text. Once we have described the competencies, we will draw connections between the chapters in the text and each of the competencies. We will show how each of the core competencies is incorporated as a foundational concept in the text. Each competency is denoted with *CC* followed by a number. This denotation will be used later in connecting the dots between core competencies and the chapters for which they serve as foundational concepts. Following are the competencies and their descriptions.

### Foundational Knowledge (CC-1)

Foundational knowledge is the first of the eight core competencies. It consists of four elements: sense of purpose, sense of heritage, knowledge of the breadth of the profession, and understanding of leadership theory.

#### Sense of Purpose

Sense of purpose refers to the general philosophy on which the practice of outdoor leadership is based. Why do we do what we do in the field of outdoor

leadership? What value does outdoor leadership hold for society? What am I as an outdoor leader trying to accomplish through my work? These are questions that help us develop a sense of purpose as outdoor leaders. They also help us develop an understanding of the general purpose of outdoor leadership. These questions will be addressed in chapter 1, but they also represent the broader focus of the text.

#### Sense of Heritage

Sense of heritage refers to the history of the profession. In understanding what outdoor leadership is as a profession, we need to understand its origins. Good outdoor leaders know the general roots of the profession, they have a sense of future trends in the profession, and they feel a sense of place within the tradition of the profession. Chapter 2 will take an in-depth look at the history of outdoor leadership as a profession.

#### Breadth of the Profession

Breadth of the profession refers to the various ways in which outdoor leadership is practiced. Outdoor leadership is broad in scope. It is practiced in a variety of contexts, from traditional wilderness programs to public schools to national parks. Good outdoor leaders are aware of the professional contexts that help constitute the profession, and they are aware of the organizational contexts in which outdoor leadership is practiced. Chapter 3 will provide a sense of the scope of outdoor leadership.

#### Understanding of Leadership

One of the primary goals of outdoor leadership is to serve as a source of transformation in the lives of people. This can be accomplished only through effective leadership. Consequently, competency in the theory and practice of leadership is essential to outdoor leadership. Chapters 4 and 5 will address the theory and practice of leadership.

### Self-Awareness and Professional Conduct (CC-2)

Self-awareness and professional conduct is the second core competency. It includes the following elements: acting mindfully as an outdoor leader, having an accurate sense of one's abilities and limitations, having knowledge and sensitivity about how we influence others, and having a strong sense of personal and professional ethics. This competency is integral to many of the other competencies.

## Core Competencies in Outdoor Leadership

CC-1: Foundational knowledge	<ul style="list-style-type: none"> <li>Sense of purpose</li> <li>Sense of heritage</li> <li>Breadth of the profession</li> <li>Understanding of leadership theory</li> </ul>
CC-2: Self-awareness and professional conduct	<ul style="list-style-type: none"> <li>Acting mindfully</li> <li>Knowing one's abilities and limitations</li> <li>Knowing how we influence others</li> <li>Behaving ethically</li> </ul>
CC-3: Decision making and judgment	<ul style="list-style-type: none"> <li>Decision making as a conscious process</li> <li>Role of judgment in decision making</li> <li>Available resources in decision making</li> </ul>
CC-4: Teaching and facilitation	<ul style="list-style-type: none"> <li>Effective facilitation skills</li> <li>Effective teaching skills</li> <li>Experiential learning</li> </ul>
CC-5: Environmental stewardship	<ul style="list-style-type: none"> <li>Environmental ethics</li> <li>Ecological literacy</li> <li>Parks and protected areas management</li> </ul>
CC-6: Program management	<ul style="list-style-type: none"> <li>Planning skills</li> <li>Organizational skills</li> <li>Management skills</li> </ul>
CC-7: Safety and risk management	<ul style="list-style-type: none"> <li>Participant safety</li> <li>Preparation and planning</li> <li>Legal aspects of safety and risk management</li> <li>Assessing abilities and limitations</li> </ul>
CC-8: Technical ability	<ul style="list-style-type: none"> <li>Proficiency in particular activities</li> <li>Experience-based competency</li> <li>Professional certifications</li> </ul>

**Figure 1.1** Eight core competencies that are essential to effective outdoor leadership.

### Acting Mindfully

Good outdoor leaders are always mindful in their actions. This means that they are intentional in all of their actions. They act with regard to the ultimate goals of a group experience. At times, this means being attentive to the needs of group members. At other times, it means being attentive to tasks that must be accomplished. Nonetheless, every action involves mindfulness and specific intent.

### Knowing One's Abilities and Limitations

One aspect of acting mindfully and intentionally involves having an accurate sense of your abilities and limitations as a leader. This means "knowing thyself," or, as Paul Petzoldt used to frequently

exclaim, "Know what you know, and know what you don't know!" Without a clear sense of their own abilities and limitations, outdoor leaders can hardly begin to define appropriate levels of challenge for their program participants. Without a clear sense of their abilities and limitations, outdoor leaders may set the bar too high, jeopardizing the emotional and physical safety of their participants. In such cases, leaders may actually become a danger to the group, and at the very least, they diminish the quality of an experience.

### Influencing Others

Another aspect of acting mindfully and intentionally involves knowing how we affect others. In what ways do you typically influence a group?

What effect does your personality typically have on others within a group? Without a clear sense of the influence that leaders have within a group, they can hardly begin to consciously fashion experiences for the group that are psychologically rewarding. On the contrary, they might come across as a social oaf serving only to hinder group development.

### **Behaving Ethically**

Yet another aspect of acting mindfully and intentionally is principled behavior. Leaders without moral scruples serve as negative influences within groups. Having a strong sense of personal and professional ethics is essential to effective leadership. The leader who bends or breaks rules or allows others to bend or break rules undermines the quality and value of an experience.

### **Decision Making and Judgment (CC-3)**

Decision making and judgment are considered by many to be one of the most crucial elements of effective leadership. Good outdoor leaders realize that decision making should be a conscious process, exercise good judgment as an integral aspect of the decision-making process, and are aware of available resources in making decisions. This competency will be addressed extensively in chapter 6.

#### **Decision Making as a Conscious Process**

Many decisions in our lives are snap decisions that we make without much conscious thought. This approach to decision making is acceptable when the decisions are simple and the consequences are not great. In situations where decisions are complex, uncertainty is high, and the difference in consequences may mean the difference between life and death, this approach is unacceptable. Good decision making is a conscious process that involves weighing options as well as consequences of the options in choosing a course of action.

#### **Role of Judgment**

Judgment becomes part of the decision-making process when the consequences of a particular decision are unclear or unknown and you as a leader must make a best guess about a course of action. Judgment is defined as an estimation of the likely consequences of such a decision or course of action. Effective judgment relies on past experience and knowledge as a basis for estimating likely consequences.

### **Awareness of Available Resources**

Conducting an inventory of available resources is essential to effective decision making. This inventory includes physical resources in the surrounding environment, physical resources within the possession of the group such as equipment, and human resources—knowledge, experience, and expertise—both within and outside of the group. This inventory is aimed at ascertaining the resources that are available to you in making a decision or choosing a certain course of action.

### **Teaching and Facilitation (CC-4)**

A primary goal of outdoor education and recreation is personal and interpersonal growth among program participants. This goal involves psychomotor development among program participants (i.e., learning technical skills related to outdoor pursuits, or how to perform a given activity). It involves cognitive development (i.e., learning new information related to outdoor pursuits). It also involves affective development (i.e., gaining a better sense of one's self and one's relationship to others). This goal is accomplished through effective facilitation skills, effective teaching skills, and an emphasis on experiential learning. Facilitation skills will be addressed in chapters 8, 9, and 10, while teaching skills will be addressed in chapter 12.

#### **Facilitation Skills**

A common approach to facilitation in the early days of outdoor leadership was to let the experience speak for itself. Outdoor leaders took a hands-off approach when it came to the broader lessons that participants might gain from an experience. Eventually, however, outdoor leaders began to realize that they were forgoing an opportunity to make a difference in the lives of their participants. They began to frame experiences in ways that would help participants gain as much as possible from an experience. This process, known as facilitation, enhances the quality of experiences for individuals and groups. It involves assisting individuals and groups in gaining insights that they may not gain on their own.

#### **Teaching Skills**

Outdoor leaders commonly find themselves offering direct instruction to course participants. Whether it is teaching participants basic wilderness living skills, climbing or paddling techniques, or safety and rescue skills, outdoor leaders are instructors. To become an effective

instructor, outdoor leaders must learn how to teach. This means learning how to create lesson plans and activities. It entails developing an understanding of different instructional and learning styles. It also entails learning how to model effective technique and how to coach others in developing effective technique.

### Teaching Experientially

Outdoor leaders place a great deal of emphasis on learning by doing. Experiential education is the method by which outdoor leaders deliver their educational content. Every lesson should involve a degree of explanation, a degree of demonstration, and a greater degree of practice. This means giving participants an opportunity to learn skills in a hands-on manner. In teaching a group how to operate camp stoves, for instance, an outdoor leader should explain the process of operating a camp stove, demonstrate the process, and then give the students the chance to actually practice operating the stoves.

### Environmental Stewardship (CC-5)

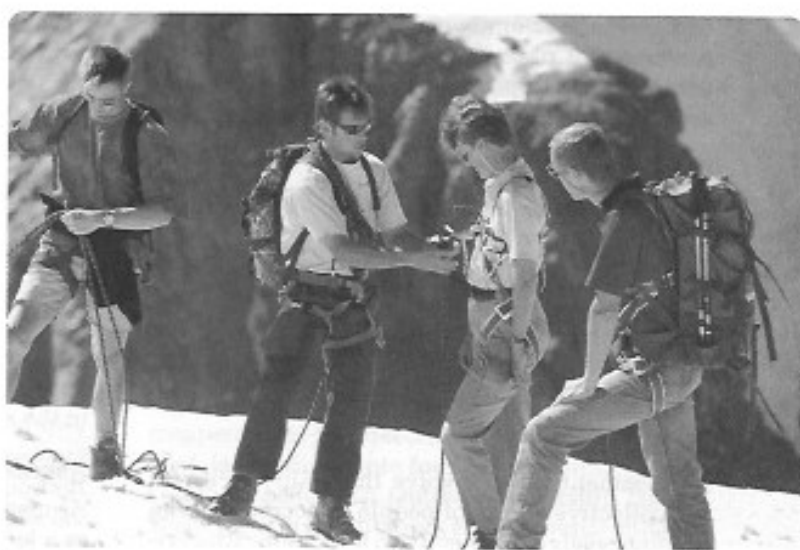
Environmental stewardship includes a strong sense of environmental ethics, high level of ecological literacy, and knowledge of parks and protected areas management. This competency will be addressed in chapters 13 and 14.

#### Environmental Ethics

Ethics is defined as a moral code or rules of conduct. Environmental ethics is the moral code or rules of conduct that we follow in our relationship with the natural environment. Outdoor leaders typically follow the code of conduct represented by the seven principles of Leave No Trace. Developed by the Leave No Trace Center for Outdoor Ethics, these principles serve as the basis for ecologically responsible interactions with the natural environment. Leave No Trace will be discussed in detail in chapter 14.

#### Ecological Literacy

One of the goals of outdoor leadership is to develop environmental or ecological literacy in individuals so that they can engage in intelligent action regarding their relationship with the natural environment. Ecological literacy entails thinking and acting critically in an environmen-



The ability to teach technical skills is an essential competency among outdoor leaders.

tal context, especially when it comes to making decisions and exercising judgment regarding environmental problems.

### Parks and Protected Areas Management

Our classroom in the field of outdoor leadership is the outdoors. We rely on natural areas as a setting for teaching and programming. Many of the areas that we use are managed by national, state, and municipal agencies. In using these areas, it is important to know the rules and regulations under which they are managed. It is also important to know the management principles and practices of the agencies managing these areas. Finally, it is important to be familiar with issues that are of particular importance to the areas into which we travel for outdoor education and recreation experiences.

### Program Management (CC-6)

Program management includes planning skills, organizational skills, and management skills. This competency will be addressed in chapter 15, on program management, and chapter 17, on expedition planning.

#### Planning Skills

Planning skills are applied in developing a program design or structure. Program design includes program goals and objectives, procedures and operations, and activities and services. Planning skills are also applied in developing trip, activity, and lesson plans. Trip plans include such

components as emergency management plans, contingency plans, time control plans, energy control plans, and so forth. Proper planning is essential to effective outdoor leadership.

### **Organizational Skills**

Once a plan has been established, the ability to implement the plan is largely contingent on the organizational skills of a leader. Implementation involves creating a system for getting things done and requires the ability to orchestrate the various components of a plan so that it comes together to create a unified whole.

### **Management Skills**

Management skills involve the ability to direct the collective efforts of people in accomplishing program goals and objectives. It includes supervision and administration skills.

## **Safety and Risk Management (CC-7)**

Safety and risk management includes ensuring the physical and psychological safety of program participants, preparing adequately, understanding legal aspects of safety and risk management, and assessing your abilities and limitations. This competency, one of the most important in outdoor leadership, will be addressed in chapter 16.

### **Participant Safety**

A primary goal of outdoor leadership is to ensure the safety of individuals venturing into natural settings for outdoor education and recreation experiences, including both physical and psychological safety.

### **Preparation and Planning**

One of the reasons program planning is considered a core competency in outdoor leadership is the implications of program planning in ensuring the safety of program participants. The old adage, "An ounce of prevention is worth a pound of cure," holds true here. Poorly planned programs are more prone to mistakes and mishaps than well-planned programs. In outdoor education and recreation, the slightest mishap can compromise the safety of participants.

### **Legal Aspects of Safety and Risk Management**

Safety and risk management in outdoor leadership must be considered from a legal perspective as well as a practical perspective. Outdoor leaders can potentially be held liable for any injury or loss

that may befall a participant. To be held liable, the outdoor leader or program for which the leader works must be proven negligent of their duty to provide a certain standard of care to the program participant. The program participant must also show that the injury or loss was actually a result of the leader's failure to provide that standard of care. In any case, a leader or a program that is shown to be negligent can be held financially responsible for injuries or losses. Program planning is as much about ensuring that participants engage in a safe and quality experience as it is about ensuring that you as a leader are adhering to the standard of care in the industry.

### **Assessing Abilities and Limitations**

As mentioned, the ability to accurately self-assess as a leader is significant not only in determining your own limitations but also in determining the limitations of your followers. As an outdoor leader, the safety of your participants is often in your hands. Knowing your and your followers' limitations is crucial to ensuring your safety and the safety of your group.

## **Technical Ability (CC-8)**

Technical ability includes proficiency in particular outdoor activities as well as experience-based competency and professional certification. There are at least two compelling reasons for the development of technical competency as an outdoor leader. First, how can you teach skills you do not know how to perform? This is especially true when you consider the importance of skills demonstration in the instructional process. Second, how can you ensure the safety of your program participants in an environment in which you cannot competently perform? A kayak instructor who plans to teach an introduction to white-water kayaking class should be able to kayak competently in at least intermediate-level white water. This ensures a level of mastery on the part of the kayak instructor in introductory-level white water both in terms of paddling technique and rescue ability. The same is true for any other sport or activity.

This text is not designed as a resource for developing technical abilities. However, a variety of other resources can complement this text for this purpose, including *The Backpacker's Field Manual* by Rick Curtis, *The Coastal Kayaker's Manual* by Randel Washburne, *How to Rock Climb* by John Long, and *Mountaineering: The Freedom of the Hills* edited by Don Graydon and Kurt Hanson.

### Proficiency in Outdoor Activities

Outdoor leaders must possess technical competency in a variety of areas. The most basic of these areas is backcountry living skills. Backcountry living skills include stove operation and use, cooking, navigation using a map and compass, animal-encounter prevention techniques, latrine construction and use, and so forth. In addition to backcountry living skills, outdoor leaders should develop expertise in different activity areas or modes of travel. These may include canoeing, kayaking, rafting, sailing, technical rock climbing, mountaineering, backcountry skiing or snowboarding, and mountain biking. The ability to operate a challenge ropes course represents another set of technical skills that is important for outdoor leaders. Challenge ropes courses are only a small part of outdoor education and recreation, but because they are so common in the industry, competency in their operation and use is necessary for all outdoor leaders.

### Experience-Based Competency

Technical proficiency in outdoor activities can only be gained through experience. The more experience individuals gain, the more competent they generally become. A common joke among many river guides when introducing themselves to their guests is, "Don't worry. I watched a video about white-water rafting last night, and I'm sure I can get you down the river safely today." Fortunately, this is only a joke. Outdoor leaders who fall out of practice in a given technical activity should refresh their knowledge and skills before leading individuals in those activities. A common practice among white-water rafting companies is to have their returning guides perform at least two refresher runs at the beginning of each rafting season on the rivers on which they will be guiding. Beginning guides must complete extensive technical training programs before being allowed to work as guides. Outdoor leaders should do their best to stay up to date in the areas in which they lead others.

### Professional Certification

Professional certifications are one indicator of competence in different areas of expertise. Certifications signify only a minimal level of competence; nonetheless, they do indicate competence. Certifications also typically represent the industry norm or standard of care in technical activities. Examples of professional certifications in the field of outdoor education and recreation include the American Mountain Guide Association's instruc-

tor and guide certifications in rock climbing and mountaineering and the American Canoe Association's instructor certifications in canoeing and kayaking.

## Connecting the Dots

This text is based on a core-competencies approach to outdoor leadership. The actual content of the book, however, is only loosely organized according to these competencies. The following information is intended to help you to draw connections between the structure of the book and the core competencies just described (see figure I.2). The book is organized into four parts: Foundations of Outdoor Leadership, Outdoor Leadership Theory, Teaching and Facilitation, and Resource and Program Management.

### Part I: Foundations of Outdoor Leadership

Part I offers insight into the nature of outdoor leadership as a profession. Chapter 1, *The Journey Begins*, relates primarily to CC-1 and CC-2. The chapter is intended to give aspiring outdoor leaders a sense of the purpose of the profession and thus help outdoor leaders act more mindfully or intentionally than they otherwise would.

Chapter 2, *History of Outdoor Leadership*, relates primarily to CC-1 and CC-2. It is intended to provide aspiring leaders with basic knowledge of the heritage of outdoor leadership. In doing so, it should help leaders develop an awareness of their place within this heritage. Understanding professional heritage enhances self-awareness among outdoor leaders and their ability to act mindfully as they help to direct the future course of the profession.

Chapter 3, *Professional Development*, relates primarily to CC-1 and CC-2. It outlines the breadth of the profession, illustrating the various settings in which outdoor leaders work. It also picks up where chapter 2 leaves off in considering the development of the profession, offering a look at the current state of the profession through the consideration of the various contexts in which outdoor leaders currently work.

### Part II: Outdoor Leadership Theory

Part II offers insight into the nature of leadership. Chapter 4, *Theories of Leadership*, relates primarily to CC-1. It is intended to provide aspiring

leaders with a sense of leadership theory and its heritage.

Chapter 5, *Leadership in Practice*, relates primarily to CC-1 and CC-2. It focuses on the application of leadership theory within the practice of outdoor leadership. It is intended to give aspiring leaders a sense of their potential influence as leaders.

Chapter 6, *Judgment and Decision Making*, relates primarily to CC-3. It is intended to help aspiring leaders develop effective decision-making skills through an understanding of the decision-making process.

Chapter 7, *Values and Ethics*, relates primarily to CC-2 and CC-3. Developing a strong sense of personal and professional ethics is essential to effective outdoor leadership. It is also essential to acting mindfully as a leader.

### **Part III: Teaching and Facilitation**

Part III offers insight into the nature of facilitation and teaching as part of outdoor leadership. Outdoor education and recreation ultimately focus on facilitating personal and interpersonal growth among individuals. As such, facilitation and teaching are vital aspects of outdoor leadership.

Chapter 8, *Understanding Facilitation*, relates primarily to CC-1, CC-2, and CC-4. The chapter is intended to help the aspiring leader develop an understanding of the goals of facilitation, the process of facilitation, and challenges to effective facilitation. The chapter focuses on one of the primary methods through which outdoor leaders attempt to help program participants gain meaning from program experiences.

Chapter 9, *Facilitating Personal Development*, relates primarily to CC-1, CC-2, and CC-4. As we will see in chapter 1, one of the primary goals of outdoor leadership is to create opportunities for growth and development among people. This chapter details developmental theory as well as the outdoors as a context for fostering human development.

Chapter 10, *Facilitating Group Development*, relates primarily to CC-1, CC-3, and CC-6. The chapter focuses on group development theory, group development processes, and expedition behavior.

Chapter 11, *Challenge Course Leadership*, relates primarily to CC-1, CC-2, CC-4, and CC-6. It is intended to provide aspiring leaders with basic theories and concepts related to challenge course leadership, standards for professional conduct in leading challenge course programs, and knowl-

edge and skills for planning and implementing challenge course programs.

Chapter 12, *Teaching Strategies*, relates primarily to CC-1, CC-2, and CC-4. It is intended to assist aspiring leaders in developing knowledge and ability to teach effectively in the outdoors.

### **Part IV: Resource and Program Management**

Part IV offers insight into resource and program management as an aspect of outdoor leadership. Chapter 13, *Parks and Protected Areas Management*, relates primarily to CC-1, CC-5, and CC-6. The chapter focuses on the agencies that are responsible for managing our parks and protected areas and the rules and regulations under which these areas are managed. It is intended to provide aspiring leaders with an understanding of the rules and regulations governing use of parks and protected areas, the obligation to help preserve parks and protected areas, and the professional opportunities that are available in parks and protected areas management.

Chapter 14, *Environmental Stewardship*, relates primarily to CC-2, CC-3, CC-4, and CC-5. It focuses on our responsibility as outdoor leaders to preserve and protect natural resources through our work as educators. This involves developing an awareness of our relationship with the natural environment, especially our impact on that environment. It involves developing good decision-making skills regarding our relationship with the natural environment. And, it involves developing an ability to teach others how to be ecologically responsible in their relationship with the natural environment.

Chapter 15, *Program Management*, relates primarily to CC-6 and CC-7. It focuses on the duties and skills involved in planning and implementing outdoor programs.

Chapter 16, *Safety and Risk Management*, relates primarily to CC-2, CC-6, and CC-7. Effective risk management involves accurate estimation of your abilities and limitations. Knowing your limitations helps you avoid getting in over your head.

Chapter 17, *Expedition Planning*, relates primarily to CC-6, CC-7, and CC-8. Expedition planning involves effective organization skills, quality risk-management skills, and technical ability.

Finally, the text includes an appendix of outdoor leadership organizations and a glossary to help the reader understand the terms used within the text.