Welcome to ODED 3540, and congratulations on your continued success at
Georgia College in the Outdoor Education program.

There is more that awaits you.

Only those who will risk going too far can possibly find out how far one can go. – T.S. Eliot

Consider that it is the empty cup that is useful, that can obtain knowledge. By intentionally and aggressively emptying your “cup,” your progress as an outdoor professional will not be the simple by-product of spending some time at GCSU, but will be consciously determined by you. This mindset may then translate into conscious living, responsible citizenry, and highly effective field instruction and management.
Acknowledgements:

Paul Nicolazzo, Steve Spencer, and Tom Stuessy should be recognized because of their individual and collective contributions to effective outdoor leadership and instruction and my personal development. This document is a more effective teaching tool in large part because of their insightful feedback and mentorship.

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Course Logistics

Instructor: Will Hobbs
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Classroom: Lake Laurel Lodge

Per university policy, changes to this syllabus may be made under the following conditions:

- Amendments to the course outline, such as changes to topics, readings, and/or the dates that these are addressed, shall be promptly provided to the students in written or electronic form.
- Amendments to a stated course policy, such as grading and attendance policies may only be made with prior approval of the department chairperson.

Schedule
May 20: 9:00 am – 4:00 pm; one hour lunch break; much work/study in evening
May 21: 9:00 am – 4:00 pm; one hour lunch break; much work/study in evening
May 22: 9:00 am – evening; classroom and the lake for skills refresher
May 23: Time TBA; Gear and Food Logistics
May 24: Early morning, Depart on Expedition
June 4: Return from Expedition; Class ends.

Student Preparation
This class is taught in an entirely different format than you may be used to during a traditional fall/spring semester. For this course, there are only three days in the classroom before we enter the field for the first trip. We will move fast. You are expected to devote a considerable amount of time outside of class in reading, preparation, and planning for: a) your individual leadership days, b) class discussions and activities and c) the expedition; as well as preparing your personal gear, exercising regularly and preparing mentally for the rigor of fieldwork.

You are expected to come to class on May 20th fully prepared to participate in class discussions and skill development sessions. This includes having completed all assigned readings and assignments and being dressed appropriately for being outside in any weather conditions. Because of the experiential nature of this class, missed classes and field trip days will be impossible to make-up. Class or field trip absences exceeding 3 hours can result in the lowering of a student’s grade by 1 letter grade for each 3 hours missed. Absences exceeding 8 hours may result in the administrative removal of a student from the course. Tardies will be counted as a minimum of 1 hour of absence.

Catalog Description
Prerequisites: ODED 2110, ODED 2140, ODED 3500. This course will focus on the integration of the outdoor, educational, & human skills essential to all professional outdoor educators. Students will utilize a backcountry context to engage in a critical
self-assessment process and practice implementing Site Management principles into field course management. Laboratory and field trips are required.

**Performance Objectives**

Through course activities, students will:

<table>
<thead>
<tr>
<th>Related Program Outcome(s)</th>
<th>Course Outcomes</th>
<th>Primary Course Assessments</th>
</tr>
</thead>
</table>
| **Program Goal 2.1:** Students will plan programs for a wide range of client groups, contexts, and outcomes. **Program Goal 2.2:** Students will apply experiential strategies to program implementation. | **Planning:**  
- Implement a range of educational strategies for macro- and micro-program design and implementation. | Field Instruction  
Reflective Exercises |

| Program Goal 3.1: Implement organizational risk management policy and procedures. **Program Goal 3.2:** Integrate risk management concepts and strategies into program design and implementation. | **Risk Management:**  
- Recognize a range of field hazards and a corresponding range of hazard management strategies. | Field Journal |

| Program Goal 4.1: Apply models and concepts of transformational leadership to specific outdoor education settings | **Leadership:**  
- Explain professional strategies for leading and managing groups and activities in a backcountry field setting.  
- Identify personal strengths and stretches in outdoor leadership. | Research Paper  
Reflective Exercises |

| Program Goal 4.3: Exhibit effective problem-solving, decision-making, and communication skills | **Decision-making:**  
- Demonstrate consistent judgment development by conceptualizing and ritualizing decision-making processes. | Field Journal |

**Relationship of Course to Departmental Mission**

The Outdoor Education program seeks to prepare educators and service providers across a broad range of related settings. The purpose of this course is to provide the student with opportunities to develop the knowledge, skills, and attitudes necessary to lead safe and effective outdoor education programs.

**Diversity Concerns Addressed**

Diversity issues are addressed explicitly and implicitly throughout the class. A fundamental premise from which outdoor educators operate is respect for diversity. Valuing diversity is implicit throughout many of the course topics.

**Outline of Course Content**

Course topics include judgment, decision-making, feedback, integrating skill sets, trip planning, risk management, hazard recognition, Site Management, etc. Watch for these – and other – keywords during this course. These are field leadership terms and phrases you should be able to define and discuss with mastery at the end of the semester. Use the glossary in the back of your course guide to write these out.
Field Experiences
Applied learning experience dates and locations are tentatively scheduled, but may change due to one or more of the following factors: group readiness and preparation, weather or other environmental conditions, equipment, availability of field staff for supervision, or permitting. Applied learning experience dates include dates during the regular semester including weekends.

Course field experiences necessitate fees that cover selected travel, lodging, food, equipment, land use permits, and any 3rd-party instructor fees. Every effort is made to minimize these costs. All course fees are paid at the same time as tuition and course fees.

Some of the applied learning experiences involve working with outside groups. To accommodate this, all students must maintain an active personnel file through the Outdoor Center. At a minimum, this requires attending the annual OC Staff Training and maintaining current Wilderness First Aid/CPR/EpiAdmin credentials.

Students are required to complete all field experiences/trainings included in this class. Because of the experiential nature of this class, missed classes and field trip days are nearly impossible to make-up. Missing field experiences will result in a zero for whatever assignments/percentages were assigned to that experience. Students unable to complete field experiences due to circumstances beyond their control will receive an Incomplete pending their completion. Incompletes not finalized within a semester become “Fs”.

FUNCTIONAL ABILITY STATEMENT: The outdoor education academic program at Georgia College is rigorous and intense placing physical, emotional, intellectual, and social demands on students. For example, in addition to traditional classroom settings, courses may include field trips, technical training, internship and practica, or service learning. These demands are commensurate with essential competencies considered necessary for professionals in the field of outdoor education and to meet expectations set for by The Association for Experiential Education Accreditation Council. The Outdoor Education Student Handbook describes the Abilities, Skills, and Conduct necessary for students to be successful in all ODED classes. Students in all ODED courses are expected to meet these expectations. Noncompliance with these expectations may result in a student being temporarily or permanently discharged from the program. Students unable to meet these functional abilities should coordinate with Disability Services.
Reasonable accommodations may be approved by outdoor education faculty in compliance with ADA guidelines. Students who are able to meet these expectations with reasonable accommodations are eligible to participate in the program of study and additional requirements for the degree. Accommodations that change the nature of outdoor education professional development, or place instructors or students/clients in unsafe situations may be denied.

**Required Texts and Readings**


**Required Field Supplies**

These field supplies are required and must be secured PRIOR to the first class on May 20.
- Two Rite-in-the-Rain journals (one small spiral, one larger bound): [www.riteintherain.com](http://www.riteintherain.com)
  - No. 393 - 4 5/8” x 7” OR No 393-M – 3 1/4” x 5”
  - No 390F - 4 3/8” x 7 1/2”

You will use the larger bound journal for your Field Journal entries and will be submitted for assessment, while the smaller spiral journal is for your daily ongoing notes.

**Student Professional Equipment List**

Most professions utilize some form of specialized equipment. For outdoor educators this equipment takes the form of technical outdoor clothing and activity-specific equipment. The gear list for this course details the personal clothing and equipment that outdoor education students are expected to have access to throughout their coursework. This list is considered as the minimum that you’ll need for required coursework. All gear is for your personal use only; program and group equipment such as canoes, climbing ropes, and shelter are provided. Although they are not required, students have found additional equipment such as a large duffel bag and additional clothing like windjackets, windpants, and synthetic long sleeve shirts helpful. All equipment is subject to inspection by the course instructors. Mark all of your gear!

**Professional Purchase Program**

Many outdoor clothing and equipment manufacturers provide discounts to outdoor professionals as a form of marketing through what is known as a *professional purchase program or prodeal*. Most of the required items on this list may be purchased through our prodeal program that offers discounts of 30-60% off retail prices from several vendors. If you have any questions, contact Dr. Jeff Turner at jeff.turner@gcsu.edu or 478-445-0947.

Professional integrity is an essential element to maintaining access to the professional purchase program for the entire academic program. The following guidelines should help to maintain and grow our professional purchase program:
• You are only eligible to purchase items for yourself – not for your roommates, significant others, or family members. However, others can purchase items for you.
• Open discussion with members outside of our community about this program is detrimental to its sustainability. **Do not use local outfitters to select/fit equipment and then tell them that you will get it on prodeal.** This has lost us prodeals in the past!
• Each vendor has different ordering processes. Most require credit cards. Most will not let you exchange items unless it is defective. Make sure that you are ordering the right item, the right size, etc. Be willing to work with the process that each vendor uses.

We are granted this privilege because it a win-win for you as well as the outdoor product company. Following the above principles will help us to maintain the relationships with vendors that we've worked hard to establish.

**Assessment**  
**Teaching (35%)**  
Design, deliver, and evaluate two field lessons

**Leadership (40%)**  
Field Journal Reflections  
Design and delivery of LOD programs  
Self/Peer Assessment  
Research Paper

**Other (25%)**  
*Leadership & Self-Deception* Paper  
Co-Leadership Interview Paper  
Readings Quiz  
In/Out of class Assignments (various)

**All assignments must be submitted in the following format:**

• All citations and references must use APA 6th edition. **All outside sources – whether quoted, paraphrased, or otherwise referenced – MUST BE CITED in your work, regardless of the assignment.**
• Work should be clearly titled and include the author’s name, class (i.e. ODED 6913), and assignment (i.e. Research Summary).
• Late work will have 10% of the project’s value deducted for each day or part of a day the project is late. Late work should be turned into the instructor directly.
• It is expected that as graduate students you will be able to submit written documents that are free of grammar, spelling, formatting, capitalization, and citation mistakes. Hence, any such mistakes will result in a loss of 10% of the project’s overall value.

**Assignment Descriptions**  
**Teaching**

**Objectives:**  
Implement a range of educational strategies for macro- and micro-program design and implementation.

**Procedures:**  
Students will design, deliver, and evaluate two events taught during the expedition. This includes the creation and revision of lesson plans, delivery and management of the lesson, and reflection on teaching post-trip. Students will also submit post-expedition one revised lesson plan that incorporates the lessons learned from their
Field instruction experience. Topics will be assigned in class and will cover a range of concepts, skills, and principles.

**Field Leadership Experience**

**Objectives:**
- Identify personal strengths and stretches in outdoor leadership.
- Explain professional strategies for managing groups and activities in a backcountry field setting.
- Plan a safe, enjoyable, and environmentally sound multi-day field program.

**Procedures:**
- The major portion of the course is designated for the training and mastery of the course concepts in a co-leadership format (pairs of students as Leaders-Of-the-Day, or LODs). This is a time of practice and experimentation with all of the principles in the relative safety and comfort of a shared leadership structure. Students will design, deliver, and evaluate multiple LOD experiences during the expedition. Students will prepare a detailed plan for their assigned days including risk management plans, outcomes, teaching plans, etc.

**Field Journal Reflection**

**Objectives:**
- Identify personal strengths and stretches in outdoor leadership.
- Demonstrate consistent judgment development by conceptualizing and ritualizing decision-making processes.

**Procedures:**
- The field journal is a combination of many things. You will be making notes on briefings, daily schedules, and debriefings; daily travel issues and glories; participant concerns and questions; personal reflections and lessons learned. Thus, the journal is your one stop for collecting and processing the wide range of experiences and stimuli that emerge throughout the course. It will also serve as an assessment tool for the course instructor.

**Research Paper**

**Objectives:**
- Explain basic leadership theories and foundations;
- Articulate a personal philosophy of leadership to guide practice with colleagues and participants.

**Procedures:**
- Students select a topic relevant to professional outdoor leadership and conduct an independent research analysis to be summarized in the form of a research paper. This assignment will span the entire semester. Some suggested topics/themes include: Decision-making and Judgment; Training new outdoor leaders; Gender and outdoor leadership; Leadership on short vs. long-term trips; Situational Leadership; Leading vs. Managing; The future of professional outdoor leadership; Intuition and the outdoor leader. Other topics may be negotiated with the course instructor. Final paper will be presented to the class. See the assignment description in GeorgiaView for more information and rubrics.

**Other**

**Objectives:**
- To ensure ongoing engagement with relevant course topics and comprehensive understanding of course material.

**Procedures:**
- Several pieces of the semester will include peer review and evaluation, including a comprehensive review of your own skills and abilities as a professional outdoor leader. A readings quiz will be written prior to the first class meeting and will cover material from the readings. Other reflection papers will be assigned as well.
Course Policies
All policies in the current Georgia College & State University Undergraduate Catalog and the Outdoor Education Student Handbook are applicable to students enrolled in this course. In addition to these University and program policies, students are expected to comply with the following course policies:

- All students must regularly check their official university email to receive official communication from university faculty and staff.
- Any student requiring instructional modifications due to a documented disability should make an appointment to meet with the course instructor within the first week of classes. An official letter from GCSU documenting the disability is expected in order to receive accommodations.
- Outdoor education programs, by their nature, often create opportunities in which participants disclose information that should not be shared outside of the program. Outdoor educators normally discuss this ethical principle early on in a program. This principle applies to outdoor education classes at Georgia College. Students are expected to respect the confidentiality of other students when information is sensitive, could lead to the identification of a student, or could create an emotionally or socially unsafe environment in or out of classes.
- Students are required to complete all field experiences/trainings included in this class. Because of the experiential nature of this class, missed classes and field trip days are nearly impossible to make-up. Missing field experiences will result in a zero for whatever assignments/percentages were assigned to that experience. Students unable to complete field experiences due to circumstances beyond their control will receive an Incomplete pending their completion. Incompletes not finalized within a semester become “Fs”.

<table>
<thead>
<tr>
<th>Grade</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Exceptional performance, demonstrating mastery and high levels of excellence and commitment.</td>
</tr>
<tr>
<td>B</td>
<td>Exceeds expectations with above average performance.</td>
</tr>
<tr>
<td>C</td>
<td>Fully meets expectations. Average performance.</td>
</tr>
<tr>
<td>F</td>
<td>Below expectations. Failing performance.</td>
</tr>
</tbody>
</table>

Classroom Schedule:

<table>
<thead>
<tr>
<th>Day 1, May 20th</th>
<th>Day 2, May 21st</th>
<th>Day 3, May 22nd</th>
<th>Day 4, May 23rd</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Gear Check</td>
<td>SPEC Writing Outcomes Event Anatomy</td>
<td>Catch up/Review Load boats/gear</td>
<td>Group Gear Pull and Check Food packout</td>
</tr>
<tr>
<td>LSD Discussion</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Core Skill Sets Competency Levels</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lunch – 1 Hour</td>
<td>Lunch – 1 hour</td>
<td>Lunch – 1 hour</td>
<td>Lunch – 1 hour</td>
</tr>
<tr>
<td>Situational Assessment Instructor Positioning Site Management</td>
<td>Blocking and Nesting Instructor Cycle SPEC Toolkit</td>
<td>Meet at Rocky Creek Afternoon paddle to Aviation Island Skills Refresher Dinner on the island</td>
<td>Complete remaining tasks</td>
</tr>
<tr>
<td>Day</td>
<td>LOD Pair</td>
<td>Travel Itinerary</td>
<td>Theme</td>
</tr>
<tr>
<td>----------------</td>
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<td>----------------------------------------------------------------------------------</td>
<td>--------------------------------------------</td>
</tr>
<tr>
<td>1. May 24th</td>
<td>Michael</td>
<td>Vehicle Travel/Logistics/Walk to camp east of Terry Cemetery</td>
<td></td>
</tr>
<tr>
<td>2. May 25th</td>
<td>Beth Anne</td>
<td>Walk to Maude's Crack and then east to John Muir Trail. Head south to Station</td>
<td>Orienting the group</td>
</tr>
<tr>
<td></td>
<td>Russ</td>
<td>Camp. Camp near Duncan Hollow.</td>
<td></td>
</tr>
<tr>
<td>3. May 26th</td>
<td>Garrett Jordan</td>
<td>Walk JMT south and camp along Fall Branch Trail. Side trip to Angel Falls</td>
<td>Safety &amp; Emergency Procedures</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Overlook. Camp near Duncan Hollow.</td>
<td></td>
</tr>
<tr>
<td>4. May 27th</td>
<td>Zoe Bobby</td>
<td>Walk FBT to John Litton Farm Hike Loop to Duncan Hollow Bike Loop. Camp at</td>
<td>Weather and Nature</td>
</tr>
<tr>
<td></td>
<td></td>
<td>northwest point.</td>
<td></td>
</tr>
<tr>
<td>5. May 28th</td>
<td>Ches Cole</td>
<td>Walk off trail to Laurel Fork Creek Trail. Head west and then north on Blackhouse</td>
<td>Navigation On/Off Trail</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Branch Trail to Charit Creek Trail and camp near Charit Creek. <strong>Resupply.</strong></td>
<td></td>
</tr>
<tr>
<td>6. May 29th</td>
<td>Grier Connor</td>
<td><strong>Rest Day</strong> at Charit Creek Lodge. Dayhike to Twin Arches from the Lodge.</td>
<td>Cooking &amp; Nutrition</td>
</tr>
<tr>
<td>7. May 30th</td>
<td>Beth Anne</td>
<td>Walk west on Twin Arches Loop to Slave Falls Trail and continue to Sawmill. Camp</td>
<td>Hygiene and Water Treatment</td>
</tr>
<tr>
<td></td>
<td>Russ</td>
<td>somewhere along Middle Creek Nature Loop Trail.</td>
<td></td>
</tr>
<tr>
<td>8. May 31st</td>
<td>Garrett Jordan</td>
<td>Follow Divide Road and Watson Branch Road to Pickett State Park and catch the</td>
<td>Risk Management on Trail</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sheltowee Trace Trail north. Find camp along Thompson Creek.</td>
<td></td>
</tr>
<tr>
<td>9. June 1st</td>
<td>Zoe Bobby</td>
<td>Continue north on Sheltowee Trace Trail to junction with John Muir Trail and</td>
<td>Group Dynamics on Extended Trips</td>
</tr>
<tr>
<td></td>
<td></td>
<td>head east on JMT. Camp near Rough Branch.</td>
<td></td>
</tr>
<tr>
<td>10. June 2nd</td>
<td>Ches Cole</td>
<td>Walk east on JMT to overlook and drop into the No Business Valley. Explore old</td>
<td>Cultural History of Big South Fork</td>
</tr>
<tr>
<td></td>
<td></td>
<td>homestead and continue east to camp near Big Island.</td>
<td></td>
</tr>
<tr>
<td>11. June 3rd</td>
<td>Grier Connor</td>
<td>Walk south on Big Island Spur to Big Branch and turn west on JMT. Head back up</td>
<td>Outdoor Leadership</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Maude’s Crack to Terry Cemetery. Logistics/Camp at Bandy Creek Campground</td>
<td></td>
</tr>
<tr>
<td>12. June 4th</td>
<td>Michael</td>
<td>Vehicle Travel/Clean up</td>
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</tbody>
</table>
Field Programs
The classroom sessions and first half of the expedition are the “Training” phase. We will utilize this experience to learn the field management systems under the guidance and coaching of the Course Instructor. This is a time of practice and experimentation with all of the principles with the goal of establishing a baseline of performance from which you can grow. Mastery is not expected during this section, but conscious engagement is.

The second half of the trip is the “Mastery” phase of our course, thus my energy will be focused on observing and assessing your leadership abilities and performance in consciously applying the principles and concepts we have been learning this semester (avoiding intuitive pitfalls) and providing feedback for your growth as an outdoor leader.

Course Objectives
1. To build leadership and judgment applicable beyond the field setting.
2. To develop a level of practical comfort working with a self-assessment process.
3. To engage with field program design, implementation, and evaluation techniques using the Outcome Model.
4. To learn and practice delivering clear, meaningful, and objective feedback.
5. To build professional communication practices by developing familiarity and competency with an operational language shared by practicing outdoor professionals worldwide.
6. To build competency with field management and instructional skills using the Outcome Model and Site Management techniques and principles.

Core Skill Set-specific

Outdoor
- Increase competency with basic outdoor skills such as backpacking with particular focus on those techniques necessary for extended travel in a backcountry setting.
- Interpret appropriate minimum impact practices for a variety of contexts and settings.
- Create and assess risk management program files according to the GC ODED PPM.
- Identify and assess a variety of activity-specific field hazards.

Human
- Assume responsibility for actions towards self and others.
- Integrate feedback from others into your personal and professional way of being.
- Assess group dynamics in flux and adjust their response appropriately to achieve positive influence.
- Exemplify compassion and grace while advocating for excellence from self, others, and the group.
- Evaluate (and revise accordingly) strategies for holistic self-care whilst in an extended field setting.

Educational
- Design:
  - Create, assess, and justify specific learning outcomes for field events.
Integrate the Outcome Model and SPEC principles to create a structured learning experience.

- Implement:
  o (Re)assess and adjust outcomes and strategies (including framing, activity management, and closure) according to the local and isolated context before and during event delivery.
  o Exemplify appropriate instructor positioning and adjustments during event delivery.

- Evaluate:
  o Integrate the Outcome Model, SPEC, and experiential principles to evaluate personal and peer teaching.

**Leadership & Judgment**
(core skill set integration)
- Integrate peer and self-assessment into a deeper awareness of personal leadership and instructional capacities.
- Demonstrate a working knowledge of staff development and mentoring techniques.
- Advocate for a personal leadership style that creates opportunities for positive transformation in individuals, groups, and the local and isolated setting.

**Trip Planning**
The overall planning details have been carefully considered and implemented by the Course Instructor and students in the spring section of ODED 6913 – *Managing Field-based Programs*. Logistics such as permitting, transportation, food and rations planning, group gear requests, teaching topics, route plans, and the like have all been pre-determined so that you can focus on individual teaching and paired LOD program designs.

Your primary travel responsibilities for your day will require **significant pre-trip preparation and map study** in a short amount of time. Focus your energies on creating a seamless program for your days with appropriate challenge and contingency plans.

**Group Gear and Equipment:**
It is the group’s shared responsibility to ensure that the group equipment is kept in pristine condition for the duration of the trip. **Missing, broken or otherwise damaged gear and equipment (beyond normal wear and tear) will be repaired or replaced at the expense of all group members.**

Each tent group will be issued the same cook gear, cook fly, tent, and food protection; groups may elect to use a 4-person tent, two 2-person tents, or a rainfly for sleeping.

**Assigned Cook Groups:**
1. Cole, Beth Anne, Zoe, Garrett
2. Connor, Jordan, Russ
3. Bobby, Ches, Grier
Food:
Everyone will be involved in the food packout from the classroom. This is tentatively scheduled for May 23rd.

We will be utilizing a rations planning format for food that will provide each group with a “pantry” of staple foods. This will allow for greater flexibility at mealtimes so each group can mix and match food to create delicious meals from a range of ingredients. This plan will require calculating the quantity of food according to pounds per day (1.5 – 2.5 lbs) multiplied by the number of person-days. For example, a 3-person group out for 8 days will need 48 lbs of food (assuming 2 lbs per person per day). This weight is broken into certain amounts of breakfast foods, trail food, dinner foods, cheese, sugars, flours and baking mix, and so on.

Risk Management:
Students are responsible for updating personal medical information forms prior to the course as well as individual Informed Consent/Assumption of Risk waivers for Backpacking.

Memories:
A critical part of any outdoor experience, the sharing and enjoyment of quotes from group members, photos, and videos, and general memories also necessitate planning. We will select 2-3 volunteers from the group to be responsible for gathering, recording, and publishing our group experience.

Leader-Of-The-Day Expectations
The major portion of the course is designated for the training and mastery of the course concepts in a co-leadership format (pairs of students as Leaders-Of-the-Day, or LODs). This is a time of practice and experimentation with all of the principles in the relative safety and comfort of a shared leadership structure. That said, you should take EVERYTHING you know about teaching and leading in the field and bring it to bear on your design and delivery of a backcountry program.

As the leader in the field on your designated “days”, you (and your co-lead) are responsible for micro- and macro-level programming. This includes designing (developing appropriate outcomes, designing a seamless progression to meet those outcomes), implementing (recognizing and responding to hazards, planning for/assessing/responding to changes on the fly, etc.) and evaluating (applying processing strategies for the experience as needed). In other words, you are responsible for every activity, lesson, foot or vehicle travel, managing risks and responding to incidents, navigating, making decisions, etc.; essentially, everything involved with outdoor leadership.

Your LOD “Block” Planning
When designing your LOD “block”, it may be helpful to consider a basic structure. While each person will design a unique experience, each block will have some common basic elements:
- Desired Learning Outcomes and intended strategies to achieve outcomes
- Detailed Time Control Plan (TCP) including
- Intended route (trail/offtrail)
- Elevation change
- Estimated distances (include any offtrail bearings and specific “jumpoff” points)
- Estimated time for each nested block
- General camping area
- Expected time of arrival at camp.
- Identified route hazards and simple management plans
- Plans for instructor positioning

The next LOD block typically begins after the evening meeting. A normal block will end sometime after planned evening activities are complete. This may look like this:

![Block Diagram]

This is just a broad look at a typical day. We will discuss the intricacies of blocking and nesting in the classroom.

**Daily Themes**

You will notice in the Itinerary mentioned previously that most days come with a theme. This is to help you make decisions on what topics/initiatives/activities to include and how to structure the learning opportunities throughout your day. The final decision for when an “official” teaching topic will be taught will be made by the LODs each day.
**Leader-Of-The-Day Guidelines**

1. **Take Charge**: Let people know you are LOD. Own your block.
2. **Lead By Example**: Awake, on time, and prepared – physically and mentally.
3. **Expect nothing but be prepared for anything**: Plan ahead and meet with the Head Instructor to (re)design the block’s activities. Be prepared for teachable moments.
4. **Communicate**: Help your participants become aware of block (or next block) activities and events well in advance.
5. **Decision Making 101**: Make decisions utilizing an appropriate leadership style. Be able to articulate the hows and whys of your decisions at any moment.
6. **Bed down the horses**: Make sure you know where everyone is camped and that they are safe and in an environmentally sound location. Ensure that food bags and other equipment are secure so you can “sleep through the storm.”
7. **Pollution, Proximity, Privacy, Depth**: Establish bathroom areas early.
8. **Sick Call**: Check-in as often as needed to see how the group and individuals are doing physically, emotionally, intellectually, etc.
9. **Protection from the elements**: Set up shelter before it is needed.
10. **Happy Trails**: Coordinate trail roles – scout, logger, smoother, and sweep. Make sure they do their job. Adapt roles for other modes of travel.
11. **Processing**: Engage and facilitate reflection and learning; debrief as needed, at a level within your competency.
12. **Repair Person**: Fix equipment yourself, or coordinate the repair as needed.
13. **Leave it better than you found it**: When camp is broken, you are the last one to personally check all campsites.
14. **Evacuation Routes**: Know the exits before going in.
15. **Water levels**: Monitor the water levels of streams crossed, those near the campsite, and those we may cross in several days.
16. **Rules are for Fools**: This list is by no means comprehensive, nor does it replace good judgment.
17. **Relax**: As Leader-Of-The-Day, relax! Do your best, apply the principles, and learn from others’ and your own mistakes.

---

1 Adapted from Spencer, 2000 and Drury, 1991.
Helpful Hints That Save Time:

Anticipate personal needs, equipment repairs, etc. BEFORE group gatherings.
  a. Bathing and washing
  b. Moleskin, foot prep
  c. Waste disposal
  d. Clothing and equipment maintenance and repair
  e. Canoe packing adjustments (trim and packing)

Share duties with your partner. For example:
  a. One cooks while the other breaks camp: stuff sleeping bags, haul gear, etc.
  b. One cleans dishes and the others secure food.
  c. One gets water and the other preps food for cooking.
  d. One sets up camp while the other cooks dinner.

The night before you break camp:
  a. Prep the stove.
  b. Get water for breakfast.
  c. Designate morning roles.
  d. Do some packing the night before; go to sleep ready to leave.

Before you crawl out of the tent:
  a. Think through your process of tasks before you get out the sleeping bag.
  b. Pack up your personal gear before leaving the tent.
  c. Be organized and intentional.

I have three rules for leaders in the outdoors: you have to know where the people you're leading are coming from, you have to know what you want to do with them, and you have to love them.

Paul Petzoldt, co-founder of the WEA
Emergency Procedures

*In case of emergency requiring assistance in the field:*

1. First aid will be administered by trained personnel and in accordance with procedures set forth by the training organization.

2. **General emergency response procedures shall include:**
   a. Survey the situation.
   b. Eliminate dangers or remove people from dangerous situations.
   c. Develop an action plan taking into account the nature of the emergency, size of group, terrain, weather, time and distance from help, etc.
   d. Implement first aid, rescue, or search procedures as appropriate.
   e. Triage multiple patients to determine who to help first based on two criteria: 1) triage implies making the most efficient use of available resources and 2) do the most good for the most people.
   f. Attend to the physical and emotional needs of group members.
   g. Consider setting up a temporary base camp and keep the group informed, protected from elements, well-fed, etc.
   h. Keep group members safe and busy to reduce anxiety levels.
   i. Complete appropriate forms, e.g., incident report, SOAP note, etc.
   j. Obtain written statements from eyewitnesses to the accident and ask for signatures and printed names at an appropriate time.
   k. Facilitate emergency debrief with group members as needed.
   l. Communicate with the field supervisor or administrative backup continuously.

**External Assistance**

1. If the group is unable to manage an emergency situation on its own, external assistance shall be requested in consultation with the field supervisor or the administrative backup.

2. The field supervisor, administrative backup, or program staff will manage a request for external assistance and related logistics based on context and the nature of the emergency.
   a. **Call 911 and ask for emergency personnel.**
   b. **Notify appropriate land management authorities (ranger, forester, etc) listed on the Route Plan.**

3. If phone access is not available a messenger party should be sent to the most effective point of communication.
   a. Leave at least one medically qualified person with the patient.
   b. If possible assign three members to the messenger party including one staff member.
   c. Carry detailed information about the location of the accident or emergency response base (coordinates, map, description, etc.).
   d. Carry detailed information about the context and the situation.
   e. Carry field supervisor or administrative backup contact information.
   f. Use a SOAP note.
   g. Carry supplies and equipment as appropriate including, but not limited to food, water, extra clothing, and emergency shelter.
   h. Move quickly but without rushing.
   i. Avoid potential injury.
   j. Avoid splitting up.
   k. Conserve energy to lead the rescue party back to the emergency base camp.
Emergency Contact Information:
GC ODED Field Supervisor System: Pager #: 866.647.3157

Sheriff Ph#: Scott County (423) 663-3111

Bandy Creek Campground Ph#: (423) 286-8368

Bandy Creek Ranger Station Ph#: (423) 286-7275

Air Evac. Site: Bandy Creek Visitor Center or Charit Creek Lodge or No Business Valley

Hospital #: (931) 752-5762

Hospital: Jamestown Regional Medical Center

Directions to Hospital:
N on TN-297 W/Leatherwood Rd (13.1 mi)
Slight R toward TN-154 S/Pickett Park Hwy (151 ft)
L onto TN-154 S/Pickett Park Hwy (7.0 mi)
R to stay on TN-154 S/Pickett Park Hwy (2.2 mi)
L onto TN-154 S/US-127 S/N York Hwy (2.0 mi)
R onto W Central Ave (0.7 mi)

See the Map to the Hospital on the last page.
Local Operating Procedures (LOPs)
Local operating procedures are useful for multi-day backcountry trips with multiple participants and can guide behavior in the local and isolated context of that specific course or program. Different LOPs may apply in different settings; however, all are ultimately governed by the PPM. Some areas to consider:
- Managing kitchen safety
- Daily tasks and communication from LOD
- Camp and trail safety
**Time Control Plans**

For every outing, whether it be a one-day trip, one day of an expedition, or the entire expedition, a Time Control Plan is necessary to correlate the factors of **terrain, distance, altitude, trail condition, group strength, and purpose** into a realistic schedule.

Knowledge of terrain is essential in formulating a Time Control Plan. If one has been to the area before, one has the advantage of relating all other factors to the previous trip. If one has never traveled there, one must familiarize oneself with it through artificial means. An excellent source of information is the topographical map, which details distances, trails, and elevations so that one can visualize the trip from start to finish and estimate how long it should take (Petzoldt, 1984, pp. 37-38).

As a part of your participant and LOD responsibilities, we will be estimating and reporting TCPs on a daily basis as a part of our closing/framing exercises.

### Symbols used for briefing & debriefing

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>TDT</td>
<td><strong>Total distance traveled (miles)</strong> Measured with small string on maps from camp to camp including deviations from trail, off-trail routes, etc.</td>
</tr>
<tr>
<td>TEC</td>
<td><strong>Total elevation change (feet)</strong> The loss/gain of elevation over the entire route. Determined by counting contour lines crossed by route and multiplying by the contour interval.</td>
</tr>
<tr>
<td>THT</td>
<td><strong>Total Hiking Time</strong> Total time spent walking with elevation change and distance combined.</td>
</tr>
<tr>
<td>TB</td>
<td><strong>Total Trail Breaks (time)</strong> Total time for breaks during travel (water, packs off, LOD decisions, lunch, etc.). Plan for approx. 10 min break for each 1.5 hours of travel. Does NOT include time for teaching (even if on trail), time in camp, etc.</td>
</tr>
<tr>
<td>TTT</td>
<td><strong>Total travel time</strong> Total time spent traveling, not including lessons. Predicted travel time must include adjustments for elevation change.</td>
</tr>
<tr>
<td>TTD</td>
<td><strong>Total time on the day</strong> Calculated from start of “group time” in the morning to evening closing.</td>
</tr>
<tr>
<td>TD</td>
<td><strong>Total difference between estimated and actual</strong></td>
</tr>
</tbody>
</table>

### Calculating Hiking Times

- On a flat trail with a relatively heavy pack, most groups can travel at about 2-2.5 mph.
- When off trail, most groups can travel about 1-1.5 mph.
- At altitudes up to 7,000 feet, add one hour of travel time for every 1,000 feet of elevation change.

**Example:**

\[
\text{5.5 miles} \quad \text{2.5 mph} = 2.2 \text{ hours} \quad \text{Elevation Change: 4500 ft.}
\]

4500 ft = +4.5 hours \quad \textbf{Total Hiking Time: 2.2 hrs + 4.5 hrs = 6.7 hours}

When in the field, as you take note of actual travel times and distances each day, apply your knowledge to the daily TCP process and your formula will become more and more refined in that local and isolated context.
“Perhaps the strongest consideration is flexibility. Progress should be checked frequently, and if it is found that estimated goals are not being reached, the trip should be revamped. Reevaluate each succeeding day’s plans according to the previous days’ learning” (Petzoldt, 1984, pp. 37-38).

**Time Control Grid**

<table>
<thead>
<tr>
<th>Date</th>
<th>Type</th>
<th>TDT</th>
<th>TEC</th>
<th>THT</th>
<th>TB</th>
<th>TTT</th>
<th>TTD</th>
<th>TD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Day 1</td>
<td>Vehicle travel not reported.</td>
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<td>Day 2</td>
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<td>Day 3</td>
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<td>Tues</td>
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<td>May 26</td>
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<tr>
<td>Wed</td>
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<tr>
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<td>Day 5</td>
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<td>Day 6</td>
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<td>Fri</td>
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<tr>
<td>May 29</td>
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<td>Sat</td>
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<tr>
<td>May 30</td>
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<td>Day 8</td>
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<td>Sun</td>
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<td>May 31</td>
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<td>Day 9</td>
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<td>Mon</td>
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<td>June 1</td>
<td>Actual</td>
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<td>Day 10</td>
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<td>Tues</td>
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<td>June 2</td>
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<td>Day 11</td>
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<td>June 3</td>
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<td>Day 12</td>
<td>Vehicle travel not reported.</td>
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</table>
The Field Journal
The field journal is a combination of many things. You will be making notes on briefings, daily schedules, and debriefings; daily travel issues and glories, participant concerns and questions; personal reflections and lessons learned. Thus, the journal is your one stop for collecting and processing the wide range of experiences and stimuli that emerge throughout the course. It will also serve as an assessment tool for the course instructor.

Trip-specific: During the expedition, students will have specific daily journal assignments that will be submitted to the course instructor.

Each daily journal entry must include the following details:
1. The date and time of entry
2. Two decision analyses
3. Field hazard analysis
4. Core Skill Set Review
5. Time Control Plan

A quick Journal How-To:
1. Write in the date and the time that you wrote the journal entry. It is expected that you will be journaling each day, not saving your work until the last day. NOTE: Journals will collected before we load the vehicle.
2. Decision Analyses: Discuss two important/complex leader decisions (per day). Important/complex refers to decisions with multiple viable options, no clear right/wrong, confusing or missing information, or with significant consequences. These must be leader decisions, affecting someone else or the group, not personal decisions like deciding to brush one’s teeth.
   a. Describe the situation. What’s the backstory?
   b. What did the leader do?
   c. In your assessment, which “situational factors” (SSRSR) were (or should have been) most influential? Explain.
   d. Describe the process used to make the decision as well as the critical factors in play.
      o Was this controlled or automated? How do you know?
   e. How would you have done things differently? Why?
3. Field hazard analysis: Choose one significant field hazard encountered during the day’s events and discuss your personal assessment of the MOST CRITICAL situational factors (SSRSR).
4. Core Skill Review: Discuss how your personal core skill set (HOE skills) is developing daily. Which Skill Set received the most work today? Why? What have you learned about yourself here?
5. Daily Time Control Plan: Even on blocks where you are not LOD, you are expected to do your own personal calculations and map study and record the TCP info in your journal. The LODs will provide the basic travel itinerary at each evening meeting.
**Decision/Hazard Analysis Rubric**

<table>
<thead>
<tr>
<th>Decision Analysis</th>
<th>Excellent</th>
<th>Meets Expectations</th>
<th>Insufficient</th>
</tr>
</thead>
<tbody>
<tr>
<td>Important and complex decision chosen. Completed all required reflection. Clear and easy to read. Identifies clear, highly relevant examples from field. Clearly describes the decision-making process and provides in-depth and insightful analysis of options, factors, and consequences.</td>
<td>Mostly critical/complex decisions chosen. Completes all or most required reflection. Demonstrates a clear attempt to integrate principles and terminology into reflection. Most examples from field experiences demonstrate the concepts accurately and effectively. Attempts to describe the decision-making process and analyze options, factors, and consequences.</td>
<td>Simplistic or basic decisions chosen. Entries show little depth and thought. Evidence of hurried and simple analysis.</td>
<td></td>
</tr>
</tbody>
</table>

| Hazard Analysis | Hazard chosen is a clear and present danger to the group. Uses the vocabulary, concepts, and principles presented in readings and class discussion precisely and accurately throughout. Assessment is concise, coherent, and insightful. Non-obvious elements are included accurately. | Hazard chosen is could be a danger to the group. Recognizes and attempts to use the vocabulary, concepts, and principles presented in readings and class discussion. Assessment is helpful and accurate, but not concise and/or lacks depth. Some non-obvious elements are included accurately. | Hazard chosen is not a real danger to the group. Little or no attempts to use the vocabulary, concepts, and principles presented in readings and class discussion. Assessment contains some inaccuracies and lacks depth and insightfulness. Few or no non-obvious elements are included. |

**IN ADDITION TO THE DAILY entry, the LOD reflection contains the following for each day you are an LOD: (MAX 400 words total!)**

a. Reflect on your *effectiveness in planning*:
   i. What were the major pieces that you missed or mis-assessed during planning?
   ii. Did your positioning plans help or hinder the outcomes? Explain.
b. Reflect on your *desired learning outcomes* for your block.
   i. Achieved? Why or why not?
   ii. Identify several contributors or inhibitors that affected achievement of the outcomes.
c. *Field Management*:
   i. Did you manage transitions effectively during your LOD? Explain.
   ii. What shifts did you make in your plans? Why? How could you have been more successful?
d. Assess the *decision-making* challenge you faced specifically as an LOD.
   i. How was it different? How did this affect your decision-making process?
   ii. What factors most affected the success of your decisions?
Day 15: TCP
From camp at Willow Branch to Ridge Trail and down to camp at Johnson's Creek
TDT: 4.2 mi
TEC: 1250 ft
TB: 30 min
THT: 3.75 hrs

Day 16: TCP
Johnson's Creek to trailhead
TDT: 2.8 mi
TEC: 650 ft
TB: 15 min
THT: 20 hrs

October 21st, 2004: While backpacking through Europe, Ted finds himself.
Teaching Opportunities
Part of this course is designed to develop your skills as a field educator as well as leader. To that end, we will have an assortment of teaching topics sprinkled throughout the expedition as practical experience for instruction. These are not the only teaching opportunities in the course (you will instruct your group during your LOD just as a matter of necessity); however, the specific topics listed below are the only ones that will be assessed for a grade. See the syllabus and/or assignment description for more specific information on expectations and grading criteria.

This exercise is an opportunity to apply the all the principles, theories, strategies that you have been taught in classes and learned from personal experience. Each student will teach at least two topics to the class. You will be evaluated on two of these events during the expedition: one short event (10-15 minutes) covering basic but necessary skills and one longer event (30 minutes or more) that covers a significant learning chunk.

Short Topics: Non-italicized topics MUST be taught.
- Local Flora & Fauna
- Pack Packing
- Wild Edibles
- Pack Fitting
- Avoiding Back to the Barn
- Health/Sanitation
- Travel Techniques
- Food Protection
- Triangulation
- Astronomy
- Weather
- Gear Repair
- Environmental Ethics
- Stove Operation
- History of Outdoor Leadership

Long Topics: Non-italicized topics MUST be taught.
- Decision-making
- Emergency Procedures
- Conflict Management
- Primitive Skills
- Group Dynamics
- Bathing & Washing
- Off Trail Navigation
- Expedition Behavior
- Baking
- Fire-Building
- Local Cultural History
- Leadership
- Risk Management
- Nutrition

You are responsible for instructing in the field. That means you should be prepared for any weather or outdoor location. Be ready to teach in the woods or rain or wind. The progression of events on the expedition is very flexible and may be altered to best meet the needs of the students or to adapt for external factors such as environmental conditions. Students must make arrangements for all necessary supplies/materials, submitting any requests for OCGC gear to the course instructor at least one week in advance (7 days) of departure.

You will be evaluated on your presence as the Instructor, oral communication ability, your personal mastery of the content, application of instructional strategies, managing risks and hazards, and effectiveness of visual aids/equipment. See the rubric for the specific performance standards.
How to assess field instruction
Use these questions as prompts for assessing your own and others’ teaching whilst in the field.

Outdoor Skills:
o Consider your competency level with this topic – consciously competent? How do you know? What specifically do you need to work on?
o How could you have prepared differently, better, etc. in order to be more knowledgeable/skilled?

Human Skills:
o What was your affective (emotional) state before and during the event?
  ▪ For example, were you confident? Over-confident? Nervous? Scared? Timid?
o Whatever you were experiencing, how did this influence your teaching?
o How well did you read your audience before and during the event? How do you know?
o Were your Human Skill DLOs on target for this group? Did you provide adequate challenge for these skills?
o What specific areas need the most work?

Educational Skills:
o Assess your framing and closure strategies. Adequate? Clear?
o Assess your DLOs – Were they: Precise? Attainable? Appropriate for the group?
o How did your design intentionally manage the group’s safety? Was it successful?
o Assess the balance between experiential and directive methods.
o Did your chosen activities/strategies help or hinder progress towards DLOs?
o How effective was your learning confirmation? Can you explain how you connected with the group and how you know they actually learned something?
o Were your progressions from activity to activity seamless? Why or why not?
o How did you adjust to your assessments of the group? Were you able to read participant cues and adjust the activities/strategies accordingly? Why or why not?
o Where were you physically and cognitively during the event? How did this positioning help/hinder (a) safety, and (b) learning?
o What is your area of greatest need in order for you to improve in your Educational Skills? Be specific.
Field Leadership
Effective leadership and activity management is a function of your judgment and decision-making. Good judgment allows you to keep safety in the forefront while utilizing adventure and achieve your desired learning outcomes. Judgment is born out of the integration of all skill sets and dispositions; the more integrated, the more sound your judgment, the better your decisions in the face of incomplete information, and thus the more effective your leadership. The following are manifestations of exemplary leadership and management in field settings:

Outdoor Skills:
- Has skill mastery in all activities utilized in the program/event.
- Has skill mastery in all environments and settings used in the program.
- Has medical and rescue proficiency appropriate to the selected activity and environment.
- Ability to select, maintain, and repair equipment appropriate to the activity and environment.
- Ability to recognize potential and existing hazards in the current setting.

Educational Skills:
- Understands the goals of the program/activity.
- Organizes activities in alignment with goals/missions.
- Designs engaging, interactive, and appropriately challenging events based on sound educational theory and models.
- Is able to facilitate debrief for feedback and transfer.
- Able to employ multiple teaching styles and approaches as context dictates.
- Able to make teaching adjustments based on verbal and non-verbal cues.

Human Skills:
- Embraces their own personal history and reality, accepting personal strengths and weaknesses;
- Disciplined to act within those recognized self-limitations;
- Is able to connect with the current group of students and adapt communication style for effectiveness;
- Maintains personal and professional integrity even in times of intense pressure;
- Able to accurately assess interpersonal dynamics to help ensure success;
- Utilizes feedback as a development opportunity.
Judgment is the act of integrating previously learned information with situational factors to arrive at a decision. Outdoor leaders are often presented with decision-making challenges in an uncertain environment with limited information. Outdoor leaders must demonstrate judgment by effectively integrating core competencies and situational variables to make and implement quality decisions. Accurate assessment and application of skills using judgment is the central quality of an effective outdoor leader.

**Decision-Making and Problem Solving**
Demonstrates the ability to examine, evaluate, and adapt decisions to maintain the overall objectives required of each of the core competency areas.
- Understands the importance of consistent personal decision-making.
- Demonstrates consistent judgment development by conceptualizing and ritualizing decision-making processes in each of the competency areas.

**Outdoor Living**
The specific outdoor skills that are essential to individual/group sustainability in the backcountry.
- Understanding and demonstration of proper campfire use, camp establishment, and basic kitchen management.
- Understanding and demonstration of proper selection, repair, and storage of equipment and clothing for self and others.
- Understanding and demonstration of proper health and sanitation techniques.
- Understanding and demonstration of planning for the safety, comfort, and organization of a group in a backcountry environment.
- Understanding and demonstration of getting from one place to another and how it is done efficiently and safely in a backcountry environment.
- Understanding and demonstration of basic weather forecasting and the implications of the effects of weather on the comfort and safety of the group.

**Planning & Logistics**
The knowledge, skills and abilities to design, implement, and prepare outdoor expedition trips a minimum of 7 days long.
- Understanding of and ability to prepare an effective plan for group outings of seven or more days in a backcountry environment.
- Demonstration of ability to design and manage proper travel progressions.
- Understanding of and ability to adequately plan and package rations for a group of five or more for an outing of seven or more days in a backcountry environment.

**Risk Management**
A structured approach to manage actual risk, emotional risk and perceived risk through: risk assessment, utilization of management and instructional resources, and development and execution of emergency protocols.

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2 “This curriculum is intended for the outdoor professional that leads outdoor experiences 4 nights in length or longer and/or has the responsibility of training field staff.” ([www.weainfo.org](http://www.weainfo.org))
• Understanding and demonstration of the knowledge, skills and abilities needed to engage the process of identifying and implementing plans that control risk in outdoor activities.
• Demonstrate ability to design, implement and evaluate an effective risk management plan.
• Demonstrate proper balance between the potential of risk with the educational benefits of adventure.
• Demonstrate ability to manage group travel by moving a group in a safe manner.
• Demonstrate the ability to organize and implement search/evacuation procedures to locate group members in need of assistance.

**Leadership**
The ability to accurately self-assess as well as those essential skills concerning or involving relationships between people; the ability to effectively implement a decision.
• Understanding and demonstration of ability to control ones own emotions and behaviors and adapt to stressful or dynamic situations.
• Understanding and demonstration of ability to maximize the potential of others and motivate them to attain shared goals to improve expedition behavior.
• Understanding and demonstration of task-specific knowledge to guide a group to attaining its goals.
• Understanding and demonstration of creativity while taking initiative and calculated risks.
• Understanding and demonstration of integrity and honesty putting the best interest of a group before individual desires.

**Environmental Integration**
The concepts that embody ecological and cultural literacy along with the cooperative planning and management skills needed to ensure preservation of resources, through personal connections, for past, present and future generations.
• Understanding and demonstration of concepts that embody ecological and cultural literacy along with the cooperative planning and management skills needed to ensure preservation of resources.
• Demonstrates the capacity to perceive and interpret the basic health of environmental systems and take appropriate action to maintain, restore, or improve the health of those systems.
• Demonstrates the understanding of the theoretical foundations of environmental education.
• Understanding and demonstration of the civic responsibly to educate land users to reduce their impact in backcountry as well as in their day-to-day lives.

**Education**
The ability to know and implement theories and practices of teaching, processing, and transfer.
• Demonstrates understanding of education theory and foundations.
• Demonstrates a variety of effective teaching and learning strategies in both traditional and outdoor environments.
• Demonstrates knowledge of teaching and learning skills to plan educational strategies and progressions. Demonstrates problem solving and critical thinking skills to understand instruction and learner achievement.
• Demonstrates understanding of appropriate educational assessment practices and procedures.

These competencies form the basis for our development this semester. You should return to this framework when faced with questions on the minimum expectations for competency in Outdoor Leadership.
The Core Skill Set  
(Adapted from Nicolazzo, 2007)

Outdoor Skills:  
Those functional – often “technical” – skills needed to:  
- participate in a given activity;  
- handle any potential emergency in that activity;  
- respond to medical emergencies in that setting;  
- recognize activity-specific hazards; and  
- select, use, and repair necessary gear and equipment for that activity.

Examples:  
Climbing: anchor building, belay technique, efficient physical movement, knowledge of activity language/jargon, geological knowledge, belay escapes, rope ascension, hauling systems, rescue systems, WFR, minimum impact practices, etc.

Human Skills:  
Those skills that allow us to (a) interact effectively with other people, beginning with knowing and accepting your authentic self; and (b) assess ourselves and others accurately on outdoor, human, and educational skills.  
- Self:  
  o Knowing and acting in alignment with who you are:  
    ▪ Operating from a place of integrity: moral character, honesty, trustworthiness.  
    ▪ Owning your experiences, your fears; accepting yourself, warts and all.  
    ▪ Accurate self-assessment of outdoor, human, and educational skills.  
  o The ability to recognize inconsistencies in your personal way of being.  
  o Acting in alignment with the program’s core principles and strategies.

- Others:  
  o Seeing other people as people, not as obstacles or threats to our own goals and desires  
  o The ability to recognize inconsistencies in other’s ways of being.  
  o Empathic understanding of others.

Examples:  
Giving and receiving feedback effectively; knowing what you know and knowing what you don’t know – and being honest about both; reading people and responding to them in a way that they feel safe to fail while striving to grow.

Educational Skills:  
Those skills needed to design, implement, and evaluate a structured learning experience to meet multiple, intentional outcomes:  
- Functional understanding of outdoor program structure and basic instructional strategies.  
- Functional understanding of learning styles/theories, and the ability to design an activity that can reach multiple types at once.  
- Mastery of all skill sets to be taught.  
- The ability to develop in others a conscious awareness of way-of-being inconsistencies through the design and management of specific activities. This may include specific facilitation/counseling skills appropriate for the local and isolated context.
- Functional understanding of assessment and strategies for determining teaching effectiveness.

**Examples:**
Writing desired learning outcomes; balancing challenge and skill; blocking and nesting; coaching during an activity; confirming outcomes; using processing techniques appropriately; functional use of SPEC.


**Integrated Skills:**
It is this blending of skill sets that is perhaps the most challenging concept to grasp and one that will continue to develop for each of us. To set you off your own journey towards understanding, consider these few examples of integrated skills:

- **Effective Communication:** One must communicate to educate using multiple styles, proper voice and tone, enunciation, etc. (thus it is an Educational Skill); but in order to be effective, one’s communication must be influenced by and adjusted to the local and isolated audience in application, which requires accurate group assessment (thus a human skill).

- **Judgment:** One’s assessment of and response to situational variables includes Human (self- and group assessment) and Outdoor Skills (recognizing hazards),
while the style and approach to communicating one’s decision to the group also requires Human and Educational Skills.

A note about adapting this model from Nicolazzo’s “HOE” model (see next page):
The use of “Activity-Specific” rather than “Outdoor” can broaden the utility and application of the Core Skill Set to areas beyond field management. In any occupation or setting where one is working with people, using “activity-specific skills”, the model can assist communication between people or groups. For example, in the human resources industry, the Activity-Specific skills may include mastery of applicable computer systems and software to manage hiring, promotion, and benefits as well as mastery of legal obligations between government, employer, and employee – these are obviously not Outdoor skills. In this way, we can utilize this framework for communicating about the basic skills, knowledge, and dispositions critical for any professional position in any field.

Leadership begins with the natural feeling that one wants to serve, to serve first. Then conscious choice brings one to aspire to lead. --- Robert Greenleaf
Educational Skills
The skills and process of creating, delivering, and assessing structured learning experiences in the backcountry are captured here according to the following:
- Core principles and values (SPEC and DLOs)
- Basic structure
- Strategies, tools and techniques

The S.P.E.C. Approach
“In the simplest terms, learning in the classroom or the wilderness involves the interaction of three essential components: the student learning, the instructor (who also learns), and the context of challenging experiences (whether planned or spontaneous) that may yield important understanding and insights” (Drury, et al., 2005, p. 13).

The Learning Cycle

The Instructor Cycle
Event planning begins with the instructor asking, “What is my level of expertise with this skill? What do I need to practice and/or read? Who else do I need to talk to about this?” Next – and equally as important – the instructor must consider the group’s abilities relative to the skill as well as how the event fits into the “bigger picture” of the course. Use the following to assist in planning your event:

DESIGN:
- Safety first
- Desired learning outcomes (“Knowledge Outcomes” in SPEC):
  - Identify the desired activity-specific and human skill learning outcomes for your students (OM). Keep in mind – If you want to teach a lot, teach a little.
    - Learning outcomes for a specific event must be in alignment with the overarching course outcomes.
    - Think enabling outcomes vs. terminal outcomes.
    - Are these appropriate for these individuals? Do they allow for an appropriate level of challenge?
    - What are your own educational skill outcomes? How will you improve as an instructor as a result of teaching this skill?
- Illuminate the Need: Use an Essential Question that gets to the heart of the Key Issue (SPEC).
  - Remember basic event anatomy:
    - Framing – Activity – Closure timing and strategies. How will you set up your event? When will you transition? How will you bring it to a close?
- **Content Criteria** – What must one know and be able to do in order to achieve a clean/functioning stove? The easiest way to be accurate, thorough and articulate with communicating content is to incorporate “focus questions.” For example, what makes a stove dirty? Why is a functioning stove so important? What are the parts of a stove? What tools do I have to fix the problem?
- **Form Criteria** – When your students have completed your activity, what will they have created/accomplished? What is the specific form? They should be able to answer for themselves: “How do I know I’ve done a good job?”
  - For example, stove repair: what is the end result of a proper event? The “form” is a clean and functioning stove. A clear and well-defined form makes confirmation of learning obvious.

- **Instructor positioning plan** – Where will you be physically, when and why?

**COACH:**
- Intervene only when safety or education may be compromised. Allow your design to work. (Plan your work, then work your plan).
- **Empower participants:** verbal persuasion and encouragement as needed; remind participants of skills learned and mastered.
- **Assessment:**
  - Safety first.
  - You will be challenged to know when to intervene and closely observe what happens so you can provide your students with effective feedback. Take notes!
    - *Your physical, intellectual, and emotional positioning as instructor is critical for this assessment.*
  - **Maintain a challenging learning environment** through skill progressions;
  - Use stationary sites to challenge to point of skill failure safely;
  - **SHIFT – CANCEL – GO:** Plan for shifts! Review your event plan and identify moments where things may go awry, where more/less direction may be needed. Then have some options available should the worst-case scenario appear.

**PROVIDE FEEDBACK:**
- **Empathic interaction** – consider their frame of reference and group culture. Can you meet your students where they are? Can you communicate in a way that they will hear you?
- **The learning confirmation:**
  - How will you evaluate successful learning? See Form above.
- **Responsibility**
- **Structure and balance formal and informal processing time.**

**FACILITATE CONNECTIONS:**
- **Empowering participants** – what can they do now as a result of your event?
- **Responsibility** – application and transfer to future settings?
- Closing: remember an effective closing is short and to the point. No need to drag it out unless students have been severely challenged on some level.
Table 1.1: CHARACTERISTICS OF A SPEC VERSUS "TRADITIONAL" LEARNING ENVIRONMENT

<table>
<thead>
<tr>
<th>SPEC Environment</th>
<th>&quot;Traditional&quot; Environment</th>
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<tbody>
<tr>
<td><strong>Student-centered:</strong> Students learn by talking, listening, writing, reading, creating, and reflecting on content, ideas, issues, and concerns as they work in small groups or individually to engage the curriculum. Authority is shared with the teacher in many ways. Students have direct access to knowledge. They are encouraged to develop their own questions and arrive at some of their own conclusions with teacher guidance. It is presumed that students have preexisting knowledge and skill that they can contribute to the learning. Students may learn from each other as much as they learn from the teacher. (See fig. 1.1.)</td>
<td></td>
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<tr>
<td><strong>Teacher-centered:</strong> The teacher is the center of authority. The teacher transmits most information and all knowledge to the learner. It is presumed that the teacher will ask most of the important questions and that these questions have a correct answer that must be validated by the teacher. Students are &quot;empty vessels&quot;—teachers are the experts that fill the vessels with appropriate knowledge. (See fig. 1.2.)</td>
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</tbody>
</table>

**FIGURE 1.1.** The student-centered learning environment

**FIGURE 1.2.** The teacher-centered learning environment
<table>
<thead>
<tr>
<th>SPEC Environment</th>
<th>&quot;Traditional&quot; Environment</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Problem-based:</strong> Teachers design complex and increasingly authentic problems for students to solve individually or in collaborative teams. Students must grapple with information (the content) as well as use skills (social, intellectual, emotional) to solve the problems successfully. Feedback and assessment is an integral and ongoing part of the process. Successful learning is assessed on multiple levels: content understanding, group process, individual skill development, etc. Students receive personalized narrative feedback regarding their performance from several sources: peers, teacher, and self-assessment. The teacher serves as a facilitator, guide, co-learner, mentor, and coach who helps students through the problem-solving/learning process.</td>
<td><strong>Content-based:</strong> The coverage of content is the focus of the learning. Teachers create structured lessons designed to help students understand and recall important facts, concepts, and processes that they will be expected to recall on tests and examinations. Concern for skill development is often tied directly only to those skills that are required for improved mastery of the content. Assessment often comes at the end of a unit of study and is frequently evaluated in terms of percentages of correct answers or expressions of understanding as shown on pencil-and-paper tests. The teacher may have little or no opportunity to share personalized, narrative feedback with each student to provide direction for future improvement.</td>
</tr>
<tr>
<td><strong>Experiential:</strong> Students learn by doing. All learning occurs within the context of real, firsthand experiences. Students participate, make choices, and accept some responsibility for their role in the learning process. The interactive nature of this approach creates a wealth of physical, intellectual, emotional, and social experiences. Learners construct their own meaning by reflecting on all these experiences. They are prompted to make connections to their own lives, larger contexts, and theory during this reflective stage.</td>
<td><strong>Theoretical:</strong> Students generally learn by listening, reading, writing, or following tightly scripted activities related to the curriculum. Students have very few choices of consequence. The curriculum exists in and of itself. Passing exams is the primary context for motivation. Curricular content is often prepackaged in discrete bundles of information to be learned in a prescribed, often linear sequence. Students may or may not recognize any connection between the content and their own lives.</td>
</tr>
<tr>
<td><strong>Collaborative:</strong> All learning takes place in a social context. Working as an individual or as part of a collaborative team, students consistently function as part of some larger &quot;community.&quot; While competition has its place, collaboration is the fundamental value. All learners are expected to work with and show respect for others. Through multiple experiences, reflection, and a conscious attention to the emotional health of the group members, students learn to value (rather than merely tolerate) the differences in each other. Success for both individuals and the group is recognized and rewarded.</td>
<td><strong>Individual:</strong> Individual performance is the primary measure of success. Competition is encouraged as a predominant value. Individual accountability and achievement is recognized and rewarded. Group accountability and achievement may go unrecognized or be actively discouraged. Little emphasis is placed on the development of social skills or group decision-making, management, or leadership skills. The emotional health of the group members is not as high a priority as individual grades on exams.</td>
</tr>
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</table>
**Desired Learning Outcomes (DLOs)**

**Key Concepts:**
- DLOs describe the desired after-effects of the learning experience – the products, not the strategies;
- Are essential to the Design Cycle and event structure and delivery;
- Must be based within the instructor’s core skill competencies;
- Crafted to develop students’ Outdoor and Human Skill competencies;
- Because they are used in evaluation and assessment of student, instructor, and course effectiveness, we utilize the language of learning domains.

**What do you want your students to feel, do, or think as a result of your event?**

Desired Learning Outcomes form a key element of the Design Cycle in Outdoor Education – **what do you want your students to feel, do, or know as a result of your event?** The DLO: (a) guides the instructor on what to teach, (b) influences teaching strategy, and (c) provides a means for assessing effectiveness. The DLOs are the beginning and the end of the event and the educational compass or anchor point along the way. An event without a clearly defined DLO may be fun, students may develop learning, but the actual outcomes are solely dependent on the group structure – the participants themselves (and the learning may or may not be what the instructor intended).

**Intentionality**

Effective educational design is defined by its intentionality. Random learning can (and does) occur within a well-managed event; a consistent result is the mark of an effective outdoor educator and is achieved only through intentionality in design. What does it mean to be intentional? Primarily, being intentional means not only having a reason for what you are doing; but also being able to answer the question, “Why?” as in “why are we doing this?” Let’s look at this in comparison to an outdoor skill. Take, for example, Navigation; here, the primary question is “Where?” (as in where are we, where are we going, etc.). The answer to that is triangulated in relation to magnetic north. In educational settings, to answer the question, Why?, we triangulate our event planning and structure and evaluation on the DLOs. The rest of the event then – the design (what are we going to do?) and assessment during the event (do I need to change what we’re doing) – is guided by the DLOs.

A consistent result is the mark of an effective outdoor educator and is achieved only through intentionality in design.

We can safely conclude that if the answer to “Why?” is found in the DLOs, then we must be able to respond adequately to the logical follow-up – why these DLOs? DLOs must be based on an accurate assessment of instructor and participant competencies and sound educational theory.
**Instructor Competencies**
Create outcomes within your topics that are in alignment with your current skill progression. We cannot teach what we do not know. As we have seen through the Competency Levels initiative, neither can we teach what we only know through intuition (we know, but we don’t know how we know and thus cannot explain). Yet, it is easy to fall into the trap of designing DLOs for our events that reach beyond our own competency levels; particularly in instructional settings such as ours.

**Do not be fooled:** no one expects you to teach what you do not know or understand; your DLOs must reflect your current state of knowledge. Address this teaching trap by taking an in-depth assessment of your own skill level relative to your teaching topic. Remember that in this class we have determined that the standard for our own teaching rests at the level of Conscious Competence. So, given where your competency level is now relative to the expected competency level, you have a better picture of the necessary training and development you will need in order to meet that goal. In reality, each of us will have differing levels of success in meeting that competency level when it comes time to design and deliver our events.

**Participant Competencies**
Similar to Instructor Competencies, we must be conscious of our participants’ current Outdoor and Human competency levels when designing our events. Given their current levels, what are the next skills needed to move forward in their skill progressions? For example, it would be a faulty progression to begin teaching anchor placement to a group of novice rock climbers. They have not yet mastered the basic concepts (climb safely and comfortably); anchor placement is an advanced skill that builds on those basic concepts in climbing. This element of DLO development requires pre-knowledge of participants and their abilities.

In some programs, initial group assessment is done through a process called Client Intake, where the program coordinator speaks with participant leaders to determine their goals and objectives, needs, and abilities (in some cases, participant goals/objectives are known simply by the type of programming offered, e.g., recreational guiding). In other cases, we utilize the first few activities with the group to identify particular areas of need. We might ask:

- What Outdoor Skills do my participants possess?
  - What areas need improvement?
- And the same for Human Skills: How is the group working together?
  - What areas need improvement?
- What issues of communication, collaboration, or collective identity do I see?
- What challenges the group/individuals?
- How do they prefer to learn, to interact, to laugh?
- What are the emotional, behavioral, and cognitive strengths and challenges in the group?
Make notes on your observations, record them, and return to them as you plan your event(s).

The Learning Domains
When we refer to “learning,” we are really talking about expanding our boundaries of feeling, acting, or thinking. In other words, when we are learning, we are actually growing emotionally, behaviorally, or intellectually. We refer to these three areas as learning “domains” and they are known as the Affective (emotional), Behavioral (doing), and Cognitive (thinking) domains (or ABCs). The learning domains serve us by improving our ability to be more specific and complex in our DLOs. When we consider what we want our students to feel, do, or think as a result of our events, we can write better and more attainable outcomes – meaning our overall instructional effectiveness improves.

It is important to understand that we do not write outcomes to be labeled as Affective/Behavioral/Cognitive. We write Outdoor and Human skill outcomes for our participants. But considering the ABCs as we write those outcomes, means our DLOs can be more concise and precise.

Determining Effectiveness
Evaluating an educational event requires an objective goal or standard by which the performance is judged. That goal or standard determines what is expected, what is
sufficient, or what is acceptable. The Desired Learning Outcomes fill this purpose as well. They provide a means by which the instructor and participants can determine progress both during and after the event. Throughout the event, the instructor must monitor participants in terms of the DLOs to confirm the learning – they are after all the basis for the entire learning experience, right? **We measure effectiveness by examining how close we came to reaching the desired learning outcomes.**

**Checklist for Writing DLOs**

When writing DLOs, I need to:  
*Adapted from BCIT, 2003.*

- Focus on outcomes, not processes.
- Start each outcome with an action verb.
- Use only one action verb per learning outcome.
- Avoid vague verbs such as *know* or *understand*.
- Check that the verbs used reflect the level of learning required.
- Ensure that outcomes are observable and measurable.
- Write the outcomes in terms of what the learner does, not what the instructor does.
- Crafted to develop students’ Activity-specific and Human Skill competencies.
- Check for appropriate number: no more than three per major topic.
- Be aware of the sub-, or enabling, outcomes for each outcome.
- Make sure your outcomes are in alignment with the larger event, program, trip, and semester outcomes.

**The DLO Skill Matrix:**

Identifying your own competencies and those of your participants, is critical to developing appropriate, meaningful, and strategic DLOs that follow a clear progression and fit within the larger mission of the course (in our case, ODED 6913).

The matrix on the next page provides space for you to capture the EXISTING skill competencies held by you and your participants relative to your specific topic (i.e., that you and your ppts will have to use to engage in the event successfully). I have provided a brief example in each box to help. Form is not nearly as important (in fact, not at all) as Process. Making accurate assessments of ourselves and others is critical to successful program design. Work the process and let the results fall where they may. Honesty and accuracy are paramount.

**Summary**

So, the Desired Learning Outcomes form the basis for the entire learning experience. They must be couched firmly within the instructor’s and participants’ competency levels. The expression of DLOs within the core skill areas of Human and Outdoor competencies must consider the primary learning domains in order to improve specificity and precision. Thereafter, our activities, initiatives, and problems are all determined according to their efficacy in supporting the DLOs. Our ongoing assessment during the event is based on *safety first*, and then on how well things are going relative to the DLOs. Our final evaluation of the event returns to DLOs as (contra)indicators of our success.

Desired Learning Outcomes must be the focus of intense working and reworking until they meet these basic parameters, a sometimes frustrating and tedious process. The rewards are nothing less than utter freedom during and after the event, as all decisions are now easily assessed against an objective standard that is easily
and clearly communicated to others. Work the process and you’ll find yourself designing and leading more engaging, more interactive, and more effective learning experiences.

<table>
<thead>
<tr>
<th>Example: Stove Operation</th>
<th>Outdoor Skills</th>
<th>Human Skills</th>
<th>Educational Skills</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instructor Competencies</td>
<td><strong>What outdoor skill competencies do you currently have mastery of relative to teaching this specific topic?</strong>&lt;br&gt;Assembling, priming, lighting Whisperlite stoves; fixing non-lighting stoves; conceptual understanding of stove function; GCSU LOPs; etc.</td>
<td><strong>What human skill competencies do you currently have mastery of relative to teaching this specific topic?</strong>&lt;br&gt;Knowledge of common fears in skill learning; empathy as a former outdoor student; patience; honesty about my own learning process;</td>
<td><strong>What educational skill competencies do you currently have mastery of relative to teaching this specific topic?</strong>&lt;br&gt;Intimate knowledge of event anatomy, progressions, learning confirmation; experience in teaching this event before; ability to design appropriate DLOs.</td>
</tr>
<tr>
<td>Participant Competencies</td>
<td><strong>What outdoor skill competencies do your ppts currently have mastery of relative to this specific topic?</strong>&lt;br&gt;Operating a cigarette lighter; safe understanding of fire danger; basic understanding of fuel combustion</td>
<td><strong>What human skill competencies do your ppts currently have mastery of relative to this specific topic?</strong>&lt;br&gt;Able to follow directions; honest assessment of abilities; internally honest about their (if not external) willingness to learn (admit lack of knowledge); ability to interact with others safely; ability to communicate.</td>
<td><strong>We don’t write Edu. Skills for ppts.</strong>&lt;br&gt;&lt;br&gt;NOTE: Determine EXISTING skill mastery in yourself and ppts; NOT what they need, but what they already have that they will have to use relative to the topic.</td>
</tr>
</tbody>
</table>
**Event Anatomy**

Each field event has distinct parts, each part with a specific purpose. These structural units are the beginning of the micro to macro design progression – a concept involving the use of course "blocks." This basic block (FAC) serves as the platform to layering on the concepts among micro- and macro-program design.

![Diagram of Framing, Activity, Closure]

**Framing**

Integrating SPEC into an event requires a significant effort from the instructor to engage the audience authentically. The framing is the gateway to informing participants of the structure, outcomes, and need for your topic.

*Key concepts:*
- Share the DLOs
- Identify any safety concerns
- Explain rules & boundaries
- Must be suited for participant's frame of reference

**Activity**

What activity/initiative/strategy do you want to use through the course of your discussion?

*Key Concepts:*
- It is the primary teaching tool thus, length should be substantially longer than the framing. Indeed, some events string multiple activities together.
- Use Basic Instructional Strategies, including a progression that falls within the your existing skills progression.

**Closing**

How will you know it is over? How will you determine if your outcomes were met?

*Key concepts:*
- Based on what happened (thus one must take good notes during the event)
- Loops back to framing, and also connects to immediate future.
- Reinforces lessons learned without introducing new information.
- Effective closures tend to be short, to the point, and simple.
- In-depth reflection is necessary ONLY when values, beliefs, or learning strategies have been challenged severely.

Every program, course, event, and activity consists of these basic structural units, **sequenced together in an intentional progression.** Activities are **nested** together within Event Blocks that create a seamless progression. Event blocks are nested together within Course Blocks that create a seamless progression.
Consider this:
These same principles that work for individual events also apply to larger course blocks. The basics of event planning work when you are designing a full day’s program as well. So a programmed day ALSO has outcomes (developed according to the group), framing, a large activity block (made up of many events), and a closing. Thus, we must utilize the Instructor Cycle and Basic Instructional Strategies throughout our management of a course day.

Basic Instructional Strategies
Although basic strategies are integrated throughout the outline on the following pages, there are some concepts that are important to tease out and explain in greater detail. This section draws from Nicolazzo’s “Basic Outdoor Education Strategies” (pp. 24 – 26) and the SPEC approach in The Backcountry Classroom (TBC) (pp. 4 – 60).

Safety First: Every decision in the field is based on two primary concepts – safety and/or education. When designing your field events, safety is your primary concern. Never allow education to take precedence over safety. Expand your risk horizon beyond what you can see; consider emotional risks, intellectual risks, spiritual risks, etc. Consider how your positioning as instructor may help or hinder your ability to adequately and continuously assess your group.

Consider Group Culture: As the instructor, you are ultimately responsible for the mood, atmosphere, and participant disposition during and after your event. You are also responsible for noting and adjusting to incoming attitudes, physical needs, and energy levels. As you design Human Skill outcomes, you should do so in alignment with the above, and in alignment with your personal vision of the group’s potential. How will the group function better as a result of your teaching?

Responsibility: Both instructors and students are involved by choice; that choice requires a commitment to give and receive feedback with humility and honesty. Participants are able to make good choices only to the degree that they are aware of the consequences of those decisions. As a member of the course and group, you also have the responsibility to ensure that your event is designed and managed in alignment with your core principles and strategies, the group’s norms and rules, and the course mission.

Create the Need: When learners become aware of a need – a deficiency of some sort – they have a greater motivation to seek out answers or solutions to that need; this can facilitate the integration of new knowledge, skills, or abilities. SPEC suggests using the Essential Question concept as one approach to helping students discover their need (TBC, p. 20). It is vital that learners understand the core reasons for engaging in an activity, learning experience, or initiative. The key components of this strategy include designing an activity that requires the skills to be taught (immediate, practical application and consequences); working within a logical skill progression that increase challenge (from previous events or experiences); and examining the “big picture” concepts in a topic.

Balance Challenge and Skill: Nicolazzo refers to this as “creative tension” and it is an important component for sparking learning opportunities and maintaining student interest. Elements of perceived and actual risk, assessment of students’ Outdoor and Human skills, and flexibility built into the event design (to adjust C&S) are critical for developing sound strategies. “More incidents occur when participants are (a) bored and seeking to relieve their boredom, or (b) when they are overwhelmed and functioning poorly, than when they are fully engaged” (Nicolazzo, 2007, p. 17).
Teach concepts inherent to the topic: This is a challenging strategy for many instructors. In short, it suggests that we teach the whys, rather than simply how. For example, if we simply describe how to light a stove, then participants are only capable of following those steps and cannot create solutions when those steps fail. However, if we explain why that procedure works based on concepts inherent to fuel combustion and stove operation, then problem-solving is much more advanced and successful. If we develop effective Essential Questions at the outset (that ask why, that address big picture concepts), then it is easier to design an activity that seeks to answer those questions. Another example: we could teach the mechanics of throwing a bear bag (teaching a specific skill), or provide learning space for students to develop their own solutions for food protection (teaching the concept inherent to bear bagging). Which is more important – the how, or the why? Your answer will shed some light on your own personal philosophy of teaching.

Balance Directive and Experiential Styles: Intentionality of course, is key here. The proper application of the SPEC model would imply that the style is based on the students’ aptitudes and learning styles. However, there must be vigilance during the event on the part of the instructor in order to maintain the balance as needed. There are times when the instructor must be more directive, and others where students can explore freely. As an instructor, “become more directive to relieve participant frustration and decrease risk. Become more experiential to increase creative tension or need” (Nicolazzo, 2007, p. 25).

Empower the Participants: Design your event to maximize participants’ control and discovery. Challenge-by-choice is the reigning philosophy aso far as participants control and manage their own risk. This requires a logical progression of skills from one event to the next, i.e., participants must have the requisite skills for success before engaging in your event. A well-designed event runs seamlessly with intervention from the instructor only for safety or education.

Confirm the Learning: Often, we see student instructors confirming their teaching. This is not the same as confirming learning. This should be an ongoing process during the event as participants develop and demonstrate skill competency. It may be a reflective process that occurs via journaling or one-on-one conversations after the fact. Of primary importance is whether you know if your students have learned what you set before them, or not.

Structure and balance formal and informal processing time: Structured debriefs must not be overused. Indeed, “debrief circles” should be applied only in circumstances where participants’ beliefs, values, or learning strategies have been severely challenged. Most often than not, instructors facilitate student processing one-on-one during other course activities.
The SPEC Teacher’s Tool Bucket

Brainstorm: A tool where an individual or group first attempts to spontaneously create (Brainstorm) ideas that might provide a possible solution to an issue or problem, and then narrows down (Distills) the ideas to the ones that seem to be “best.”

Carousel: A Carousel is where you arrange participants into groups and rotate them around and have them respond to a series of questions or issues. Three to five people make an ideal group. You may want to decide how many groups to have based on the number of questions or issues you want to explore.

Challenges: Challenges are SPEC learning experiences that progress with increasing authenticity, complexity, and uncertainty, requiring an increasing variety of resources and degrees of student self-direction to accomplish.
- Academic: Learning experiences structured as a problem for learners to solve.
- Scenario: Similar to the Academic Challenge, but its authenticity is enhanced by placing the problem within the context of a current, historic, or futuristic role play where the roles are either reality-based or fictional.
- Real Life: A real-life problem is driven by a real situation that requires a real “solution.” It usually comes from the larger community, is authentic, and has real-life consequences.

Check-in: The Check-In is a ritualized activity where the group goes around to all group members and invites them to share one of two things:
1. Anything that is going on in their life outside of the immediate learning environment that might affect their role of learner on that day.
2. Any observations about what they have learned or experienced that has had an impact on their learning.

Chunking: Chunking is a technique for getting and keeping information in short-term memory; it is also a type of elaboration that will help get information into long-term memory. For our purpose, Chunking is a technique we use for breaking down a task or challenge into understandable “chunks,” i.e., we chunk a challenge by breaking it down into smaller understandable units so that everyone has a clear understanding of what the task is.

Collaborative: While Collaborative Learning has many features of Cooperative Learning (such as working in small groups, interaction with peers, active participation, groups grappling with understanding concepts, ideas, addressing issues and producing results that would be impossible individually), Collaborative Learning has some unique characteristics that define it as different from Cooperative Learning:
1. Collaboration requires more than just getting along and doing a share of the tasks. Collaboration requires an investment in the group’s goals and sharing in the group vision. It means that members are willing to disagree and “bang heads” in a positive way in order to insure that the
task gets done to the highest standards possible given the resources available.

(2) Successful Collaborative Learning requires learners to recognize that learners have different learning/collaboration styles and that successful teams require representation from all of these different approaches. Collaborative learners recognize that working with learners whose style is different from their own is frequently painful, but that without the diversity of styles the team is incomplete.

**Jigsaw:** A Jigsaw is a cooperative learning activity that promotes the sharing and understanding of ideas or texts by creating “expert” groups and then mixing the groups into “task” teams so they get to share and use their expertise. It can be tricky to do your first Jigsaw. You really have to be organized and plan the whole activity through. When you try this for the first time, don’t be too ambitious. Choose a fairly straightforward topic. Work on the logistics, i.e., what you want the students to do and when, how long each grouping will take, how students will apply the information they teach/learn, what happens next (an Academic Challenge?).

**PMI (Plus – Minus – Interesting):** Using a chart with three columns, one each for P, M, & I, an individual or group can look at the plusses, minuses, and interesting characteristics of an issue or option.

**Sweep:** To Sweep is to go around and individually ask each person for input or their opinion on the issue or problem at hand. You Sweep around the group inviting input. Individuals respond or have the option to “pass” without saying anything. People who pass are invited to give input again once the Sweep is completed.

**Thumb Tool (Thumb-O-Meter):** The Thumb Tool is a consensus “voting” tool that allows each person to share their position on an issue. There are three ways to “vote”:

1. A thumb up means that the person enthusiastically supports the decision
2. A horizontal thumb means that the person supports the decision but has reservations or doesn’t have strong feelings one way or the other;
3. A thumb down means the person cannot accept the decision. The person giving a thumb down must provide a rationale for their position and provide an option that they would find acceptable
4. For an issue to be approved, all thumbs must be either up or horizontal; there must be no thumbs down.
Human Skills

Expedition Behavior (EB)

What is EB?

An awareness of the relationships of individual to individual, individual to group, group to individual, group to other groups, individuals and groups to the multi-users of the region, individual and group to administrative agencies, and individual and group to local populace. **Good Expedition Behavior** is the awareness, plus the motivation and character, to be concerned for others in every respect one is for oneself. **Poor expedition behavior** is a breakdown in human relations caused by selfishness, rationalization, ignorance of personal faults, dodging blame or responsibility, physical weakness and in extreme cases, not being able to risk one's own survival to insure that of a companion.

--- Paul Petzoldt

**Expedition Behavior and Self-Deception**

Expedition behavior is interdependent on all members of the group. Thus, EB is dictated by each member and is only truly functioning if each member is avoiding self-deception. EB does not mean tiptoeing around or avoiding conflict. It means that outcomes are the focus, and group members are working together diligently to reach those outcomes. Group challenges will occur. How you choose to perceive and behave towards those with whom you interact determines productive or counter-productive EB.

We often hear of marriage referred to as a 50-50 proposition, right? That comes from the idea that two 50%s create a 100% whole. Consider that for a moment in a group context. If we have five people in a group, then we have a 20-20-20-20-20 proposition right? Makes sense, 'til you look at the actual numbers. Does this mean that, in marriage, we should only give half of ourselves? Or that in a group of five, we are expected to commit only 20% of ourselves? You would say, “Of course not!” Sounds a bit silly doesn’t it? Because it is.

The challenge before all of us is to discover those internal obstacles (that we have created) that are preventing us from devoting 100% of ourselves to our relationships. I have to realize that I cannot become fully integrated into the group until I become fully integrated within myself, moving into deeper awareness and acceptance of self.

What if we feel overwhelmed? I like what Lou says in *Leadership & Self-Deception*:

**It generally isn’t our obligation to others [that overwhelms us], but our in-the-box desperation to prove something about ourselves.**

How will you choose to proceed?

**Option B**

The Option B approach to expedition behavior involves recognizing that our actions and reactions stem first from a choice. We always have a choice. We are
never in a position where one Human Skill action or reaction is the only option. We always have a choice.

The key to recognizing this choice is found in dismantling the false walls and screens that we construct in our minds to cope with the cognitive dissonance created by self-betrayal (I know I am not acting/thinking appropriately towards another person). Those walls insulate us from that harsh reality so that we can simply continue to function. Can we be free from self-betrayal? Ask yourself, “Am I willing to work that hard? For others? Am I willing to examine my motives, my boxes? Will I end the war in my heart?”

But when we break down those walls, own our hopes and fears and the fact that we are not thinking/behaving in alignment with our core principles and strategies, we find that we do have a choice in every situation. It is in that moment – in that place – that we can move as the narrator in Frost’s poem and “take the road less traveled” – Option B.

Where are you exerting most of your energy in your relationships? *Helping things go right, or reacting when things go wrong?*

**The Change Pyramid**

Most time and effort should be spent at the lower levels of the pyramid.

1. One’s effectiveness at each level of the pyramid depends on one’s effectiveness at the level below.
2. The solution to a problem at one level of the pyramid is always below that level of the pyramid.
Group Member Checklist
Use these questions to guide your behavior and reflections throughout the day.

1. How do I feel physically? Emotionally? Do I need to address my co-leader, instructor or group about anything?
2. How is my E.B.? Am I self-maintaining well enough, i.e., bathroom, cleanliness, feet, hydration and mental focus?
3. Am I a good tent/tarp resident? Is my stuff organized?
4. Am I willing to be an exemplary follower today?
5. What initiatives will we engage in today? Am I ready to learn?
6. Am I in the box towards anyone? Do I see any signs of the box (blaming, justification, false attributions, etc.)? Do I see collusion?
7. Am I as ready for my event as I can be? Have I honestly given it all I have?
8. Am I keeping up with my journal? If not – you NEED to make some time for this.

What else is important to you in your interactions with others?
Jot down a few thoughts here.
We must value reality more than we value our ego.

Feedback Looping
Perhaps the most challenging skill, and most critical in leadership development, is the ability to create, share, and receive feedback on our leadership performance. Why is it so difficult to give and receive feedback? Many variables are involved here, and most can be distilled down to issues of ego, pride, self-deception, and fear. This is a part of being human – we like ourselves and would prefer that others like us (or at least appear to like us!).

As we’ve already seen, in order to become the most effective leaders we can become, we must value reality more than we value our ego, and we must encourage our students to value the same. There is a way of creating and delivering feedback that can allow us to engage with reality without causing undue stress and anxiety in our group. We do this by avoiding the subjective, the emotional and irrelevant, and couching our feedback in very clear and precise terms that have shared meanings – a common framework that is understood by everyone: Human, Outdoor, and Educational Skills (HOE).

Effective feedback is achieved through a clear, meaningful, and objective (CMO) process.

**CLEAR:** The feedback is communicated with empathy in a safe environment in terms the listener can understand and connect to.

**MEANINGFUL:** The feedback is derived directly from the core principles and strategies of the program, course, day, and event; i.e., is shared in direct connection to the DLOs. The feedback is generated from direct, relevant observation of behavior and attitudes, and is delivered in a timely manner. The feedback process is efficient and concise, i.e., each giver of feedback should strive to develop insightful and original comments and take care not to repeat points mentioned by other group members.

**OBJECTIVE:** The feedback is based upon a framework that exists outside the leader, group, course, or program; a benchmark or standard that all must adhere to. In outdoor leadership, that framework for leadership is the integration of the core skill areas.

One approach to developing this sort of feedback is known as **Feedback Looping:** a process of structured reflection and exchange by leader(s) and group that builds a database of information on both leader and group performance. The process is described as follows (see Figure 1.1):

1. At the end of a designated leadership block, both leader(s) and group reflect separately on the leadership demonstrated during the block. In most cases, the group reflection and assessment is best accomplished in pairs. Ideas generated during this reflection time should be recorded in terms of HOE skills.

2. When the whole group reconvenes, the leader(s) debrief themselves first, sharing with the group their own self-assessment of leadership performance according to HOE skills. If the leader(s) mention an item on a group list, the
group should check the item off and not mention it during their debrief time. Utilize “snaps” here to indicate agreement.

3. Once the leader has finished, the group then debriefs the leader(s) in terms of leadership performance according to HOE skills. If one group pair mentions an item on another pair’s list, it should be checked off and not mentioned again.

4. If outcomes were severely challenged by group dynamics, the leader may choose to debrief the group on HOE skills s/he observed in the group.

5. Finally, the group may or may not choose to provide feedback to other group members, again according to HOE skills observed during the leadership block.

Figure 1.1: Feedback Looping

NOTES:
The listening party may ask questions for clarification during the feedback session, but should refrain from responding to the feedback for a designated time period. This is very important. The feedback session is not a time for defensiveness or justification, but for listening. A “waiting period” helps reduce the emotional component and thereby adds clarity to the message. The role of the leader during group feedback is to listen, to hear the group’s comments, take notes as needed, and reflect over time on the feedback. For this course, we will use a 24-hour waiting period before responding to feedback.

A FINAL WORD:
Obviously, in order for feedback looping to be truly successful (CMO), each participant and leader must “buy-in” to the process and be engaged in assessment throughout the leadership block. This requires an attentiveness and level of organization many students are not accustomed to in many outdoor trips.

| Reflection period post-experience | Leader to self | Group to leader | Leader to group | Group to group |

It has always been very easy for me to put on a show and be cocky, and be flooded with a cocky feeling and feel pretty cool and all that. I can make all kinds of phony things. Blinded by it. Or I can show some really fancy movement.

But to experience one’s self honestly, not lying to one’s self, and to express one’s self honestly; now, that is very hard to do.

– Bruce Lee
The Outcome Model (OM) was born out of 25 plus years of field time by Paul Nicolazzo. Paul was an Outward Bound instructor for many years, eventually ascending to Lead Instructor-Trainer. Through the course of leading and teaching in the field, Paul devised multiple systems for teaching, risk management, and managing sites; when put together, his systems became the Outcome Model. As with any model, over time it must be refined and adjusted to more accurately reflect real-life. The OM is not exempt from this process. Indeed, the model you see above is continually being adapted by numerous outdoor professionals. However, it is a useful tool for beginning the conversation of holistic program design and management and the development of a universal operational language.

In the field, instructors engage with ever-changing conditions relative to students, equipment, risks and emotions. An instructor’s ability to consistently and accurately re-assess these conditions is the indication that good judgment is present. The OM highlights the importance of assessment and re-assessment, and if implemented properly, allows instructors to remain seamless in their teaching/trip progressions. Indeed, the entire model is designed to reduce complexity and provide a framework for making sound decisions in the field.
Reducing Complexity
When we consider the vast array of skills, qualities, abilities, characteristics, etc. that are expected and required of outdoor leaders, it can become unwieldy to communicate, much less train someone. To that end, the Core Skill Sets provide a way of compressing the scope of outdoor leadership into a manageable context. We can also look to the simplicity of Event Anatomy (framing, activity, closing) as another example of reducing the complexity of the program planning process at the micro and macro levels.

The Outcome Model also provides a systematic structure that informs our judgment and clarifies our decision-making process. Again, if we are interested in reducing our dependence on intuition and making our leadership processes more conscious (and thus transferrable), then we need to work to explain what’s happening in our minds.

- What are the critical facts? Situational Awareness
- How do we gather this information? Situational Assessment
- How do we determine legitimate options? Judgment
- How do we choose the best? Decision-making

Situational Awareness
Our situational awareness (SA) is the result of our ongoing assessment (gathering of facts) that occurs by analyzing SSRSR. Outdoor leaders “read” a moment in the field by paying attention to “the nature of situational interactions through perception, observation, knowing about themselves, the group, and the circumstances of any specific situation” (Cockrell, et al., 1991). SA is further explained as the ability to identify, process, and comprehend the critical elements of information (SSRSR) about what is happening to the group with regards to the program goals/outcomes (adapted from Endsley, 2000).

Situational Awareness is the ability to identify, process, and comprehend the critical elements of information about what is happening to the group with regards to the program goals/outcomes.

Situational Assessment (SSRSR)
Identifying and gathering the critical facts in the field is essential. It is of utmost importance to assess these variables as they exist at the moment of decision. That means the instructor must set aside ideas about how things should be and focus in on what is. This is the value of ongoing assessment – the (re) in (re)assessment – and provides the information vital to an appropriate and safe decision.  

Situational Assessment is a practical strategy for identifying, processing, and comprehending the key variables as they exist at the moment of decision.
Staff:
Does your instructional team have the Activity-specific, Human, and Educational skills necessary to successfully design and manage the site right now?
- Does their level of skill mastery match the activity?
- Can they effectively assess/pause action/intervene/rescue a student?
- What is their current position?
  o Position includes current physical, emotional, and intellectual state

Students:
Do your students have the Activity-specific and Human skills necessary to successfully complete the proposed activity right now?
- Does their level of skill mastery match the activity in play right now?
- Can they effectively self-assess?
- What is the current state of interpersonal relationships with each student and the group/staff?
- What is the current level of trust in the group?
- Level of maturity?
- Level of decision-making ability?
- Level of communication skills?

Resources:
What resources are at your disposal both within the group and at your location, but within reach with travel?
- Additional Staff/Backup
- Staff and student knowledge and expertise, including medical training
- Equipment, supplies, tools, etc.
- Course area guide
- Instructor manual, policy & procedures, etc.
- Commercial guidebooks, maps, logistical support
- Emergency services information, local hospital location and number, etc.
Should the known hazards result in injury, are you able to respond effectively given the resources at your disposal?

Site:
What physical, emotional, and environmental hazards are present?
Where are the safe zones between those hazards and how do you move the students from safe zone to safe zone?

Risk:
What are the real consequences associated with the actual risk?
- Identify the existing potential for loss in the situation. Extend your visual and risk horizon to all sides.
- Distinguish between perceived and actual risk.
Identify the challenges posed by managing the actual risk.
- Note your staff, students, and resources.
Does the site management plan reduce any actual risk to acceptable standards?
Be sure that the activity framing is directive and covers all aspects of your risk management plan.
**Judgment**
Can judgment be taught? How do we develop the cognitive ability to bridge a gap between known information and intuition? Through the Situational Assessment we can work to increase the quantity of our known information; bringing experience to bear increases the *quality* of that known information. But how do we improve intuition? *Experience, feedback, and reflection.* This is a primary goal of the Leader-Of-The-Day exercises here. Build your experience, provide feedback, and guide your reflection so you can begin to “see” what’s happening around you.

To make sense of all the complex information happening in an outdoor program, we need to put some labels on the myriad phenomena. The intuitive leader senses the information but can’t describe it. Let me illustrate further. Let’s pretend the outdoor program is akin to a kitchen pantry. Suppose you go to your kitchen pantry to see what there is to eat. When you open the door, you find fully stocked shelves with cans, jars, boxes, bags, all full and ready to eat. Quite lovely! It’s the same with an outdoor program – lots of opportunities for learning. The intuitive leader (seeing but not describing) opens the pantry and finds the same cans and packages, but none of them have labels. The intuitive leader knows instinctively what to grab and fix, but has no idea why *that* can, *that* box, *that* bag. The intuitive leader needs labels on the food. The intuitive leader needs labels on the essential elements of the outdoor program. This is what the Outcome Model gives us – an operational language with which we can communicate changes, needs, and vision for the outdoor program. *If we can describe what’s going on around us, we can manipulate what’s going on around us. We can control it with purpose.* We can design each experience more efficiently and with greater insightfulness and surgical precision towards client outcomes.

**Decision-making**
This is what you do with your assessment and your judgment. We have three options in every decision. This is the core of judgment and outdoor instructorship: (re)assessment of multiple variables, weighing each, and determining a course of action that maximizes safety and desired outcomes (*SHIFT – CANCEL – GO*). Canceling or “GO” are pretty self-explanatory. Stop activity or press on. When we *shift* our program, we are moving from one option to another, a different direction. To make this happen and maintain our intentionality, we must plan for shifts and have multiple options. Often, we will find ourselves shifting from two different types of sites in the outdoor program – this is *Site Management*.

**Site Management**
“*Site Management*” in the Outcome Model is defined as a continual process of (re)assessing multiple variables and adjusting activity design accordingly in order to maintain creative tension (challenge vs. skill) and to manage risk effectively.

To see how this process works in the field, we must first understand that ALL field operations can, at any moment, be split into one of two types – *stationary* or *moving* sites. This approach asserts that every action that takes place in an
outdoor program occurs either in one of these two types, or in the naturally occurring transitions between them. NOTE: *It is not the activity that determines a situation’s type – it is the status of the hazards, safe zones, boundaries, and communication.* Let’s look at that a little closer:

**Stationary Site Management (SSM)**
- **Minimized actual risk.** The risk inherent to the activity still exists but is managed properly.
- **Clear and fixed boundaries** (time, space, movement, participants, activity rules, etc);
- Potential and actual **hazards:** Mostly known and accounted for.
- **Safe zones are known and identified PRIOR** to the start of the activity.
- Instructor is **able to communicate easily and effectively** with participants/co-instructor, and intervene quickly if safety is compromised.

**DISCUSSION:** *How do we use stationary sites?*
Through the application of the Outcome Model to program/event/activity design, the instructor team can intentionally create a stationary site as needed in order to meet specific desired outcomes. These sites are most effective for the basic transfer of information; for the sharing of knowledge. **Stationary sites are common throughout the Training phase of a course when participants are initially learning activity-specific and human skills.**

*Can you identify a few examples of stationary sites you have experienced whilst at Georgia College? Explain.*

**Moving Site Management (MSM)**
- **Critical information** such as boundaries, hazards, weather conditions, safe zones for traveling and coralling is unknown prior to start.
- Timely and effective **communication is often difficult** due to activity “noise” (distance, environmental interferences, etc.).
- The **instructor has less control** over participants and movement than in a stationary site. This may be due to necessary instructor movement (during travel, etc.) and is influenced by the speed of the activity (e.g., mountain biking).
- Thus, **actual risk is increased** in a moving site (relative to a stationary site).
- **Can still be intentionally designed** to meet specific DLOs.
- Can also be unplanned and uncontrolled when key variables change and are not accounted for by the instructor – not good!

**DISCUSSION: How do we use moving sites?**

Through the application of the Outcome Model to program/event/activity design, the instructor team can intentionally create a moving site as needed in order to meet specific desired outcomes – usually advanced in nature. The management approach required to safely navigate through a moving site is very different from that required in a stationary site. First and foremost, safe and effective use of a moving site requires that participants and instructors have skill mastery in all the skills necessary. This is a major factor in MSM. To establish skill mastery, participants must have tested to failure in MULTIPLE stationary sites before using a moving site. Moving sites are most effective for the application and confirmation of learning. Moving sites are common throughout the Mastery and Finals phases of a course when participants are demonstrating competency in activity-specific and human skills.

**Analysis**

Ok, so that means we have a site-type with minimal actual risk, good communication lines and easy control of the group (stationary site), and we have a site-type with unknowns, difficult communication, reduced instructor control, and increased risk (moving site). It sounds like we should always work to create stationary sites, and avoid moving sites as much as possible. Not really! And it all boils down to the management strategy. Let’s compare:

**SAFETY:** It depends. What is the management strategy at work? Moving sites have higher risk, true. However, a well-managed moving site can be just as safe as a stationary site.

**EDUCATION:** It depends. What are the DLOs? Here we begin to see the availability of these categories as educational strategies – they can become very effective tools in the educator’s bag of tricks.

**EFFICIENCY OF MOVEMENT:** Moving sites are far more efficient at moving groups from A to B, physically, intellectually, and emotionally.

By now you should be picking up that it is very difficult to continue our discussion of these two types of field sites without inserting management strategies into it. If the instructors have intentionally designed a program using an appropriate management style and are competent in all the skills necessary, then stationary and moving sites are utilized as needed to meet differing DLOs. If properly managed, one type of site is not better than the other – they both serve different purposes and roles.

On the reverse, if the management strategy is inappropriate, then we do find many challenges to safety and education, as a poorly designed activity in a stationary site can easily become an unplanned and uncontrolled moving site – a

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A moving site must not be used if the consequences of skill failure could be catastrophic.
recipe for disaster. When can this happen? Whenever physical, social, or environmental conditions change, a stationary site can become a moving site. Whenever a participant moves beyond a set boundary, a stationary site can become a moving site. Whenever a shift occurs in an activity or event and new boundaries are not set, a stationary site becomes a moving site. Any time the inherent risk in an activity changes, a stationary site can become a moving site. Any time that communication between instructors or between instructors and participants is reduced, a stationary site can become a moving site. **It is not the activity that determines a situation’s type – it is the status of the hazards, safe zones, boundaries, and communication.**

**Example:**
Let’s look at one example of an *unplanned transition*:

A group of high-schoolers are on their first multi-night backpacking trip with a pair of college-aged leaders. They have made camp just after dark after an easy day on the trail in a hardwood forest. One leader has planned a brief lesson on bear bagging and has decided to deliver it before setting up tents. The group has shed packs and is reclined at the base of tree while the leader explains and demonstrates the basic knots and technique for the two-tree method. **[This is an example of a stationary site. Can you explain why?]***

Once the basic information has been delivered, the second leader throws out a bag full of cord and carabiners and says, “Alright, go find you a tree and hang a bag!” The group slowly gets up, separates into pairs and singles and trudges off into the woods to “find a tree and hang a bag.”

Is it still a stationary site? No! It is now a moving site. How did this happen? 1) There are no boundaries – no time limit was specified (“Take x minutes for this activity”), no area was specified (“Stay within sight of this tree”); 2) because there are no boundaries, sight and communication with participants is challenged and no instructions were given on communicating with instructors if help is needed; 3) should an emergency arise, there is no safe zone specified for participants to corral in; 4) we may also wonder if the instructor has properly scouted the terrain outside of the camp for gullies, cliff edges, widowmakers (potential hazards) and if these hazards were communicated to participants properly.

**LIGHTBULB: How can we use Framing to form the site type?**
In the space below, describe an example from your own experience of:

**A Stationary Site:**

**A Moving Site:**
Core Concept Initiatives

**Initiative #1** – Core Skill Sets: In classroom. This initiative introduces the core skill sets and frames the beginning of our operational language.

**Initiative #2** – Competency Levels: In classroom. This initiative helps develop critical and accurate self-assessment.

**Initiative #3** – Establishing Desired Learning Outcomes: In classroom. This initiative allows students to incorporate self-assessment to establish their teaching outcomes.

**Initiative #4** - Event Anatomy: In classroom. This initiative highlights the basic structural units of event management.

**Initiative #5** – Basic Instructional Strategies: There are a variety of ways to teach effectively. This initiative encourages students to consciously choose a strategy and incorporate a plan so that a teaching performance can be more easily assessed.

**Initiative #6** – Situational Assessment: This initiative is designed to introduce SSRSR and allow students to develop competency in verbal assessment.

**Initiative #7** – Instructor Positioning Systems: This initiative assists students in understanding the importance of emotional and physical presence and will allow them to make accurate assessments of their own students.

**Initiative #8** – No-Doze Leadership: An initiative developed by Molly Doran (NOLS) and adapted for our use here to continue the conversation on leadership styles and approaches in the field.

**Initiative #9** – Feedback Looping: Bringing to life objective feedback techniques, this initiative invites students to learn the concepts associated with delivering and accepting clear, meaningful, and objective feedback.

**Initiative Note:**
Much happens while teaching site management and the outcome model concepts; every group is truly unique. These initiatives are not meant to be followed lock-step, but rather to merely suggest a way to approach the concepts of site management and the Outcome Model. Further, these initiatives represent only the core concepts. Instructors have the liberty of incorporating related topics as they wish.
The Core Skill Sets
This initiative digs deeper into the discriminating factors between Human, Outdoor, and Educational Skills. The initiative is best suited for early in the course as the CSS serve as the frame for all subsequent initiatives.

Instructor Notes:
Desired Learning Outcome – To improve cognitive understandings of the individual skill sets, how they can be and are integrated, and begin the process of self-assessment relative to the CSS.
Time Requirements – Approximately 45-60 minutes.
Location – This initiative is best done prior to field sections.
Resources – Whiteboard
Instructional Caveat – Must have a command of the core skill sets including definitions, concepts such as integration, and growth.

Framing: Check for current understanding of key concepts. A quick check: on a sheet of paper, please share your current understanding of the terms: Outdoor, Human, and Educational Skills. If you have a question about these terms or their relationship, please write that at the bottom.

The CSS form the base layer for our class this semester. Everything from peer assessment, developing outcomes, and determining appropriate teaching strategies to assessing situational risk factors, providing feedback, and plotting a course for self-improvement takes place in the context of the CSS.

Activity:
Step 1 – Brainstorm with the group: what are the essential skills, knowledge, abilities, dispositions, and attitudes necessary for the outdoor leader. Ask for both simple and complex skills. Be sure to define outdoor leader in a relevant context for the group. Accept all answers and write them on the board.

Step 2 – When exhausted, it should be obvious to the group that some skills are related. Begin with any item on the board, identify it as a CSS, and make connections to other items also within that skill set. Circle the related skills with the same color marker. Repeat with the remaining two skill sets. NOTE: Some skills may fit into multiple skill sets – these are useful for discussing skill integration.

Step 3 – Once circling is complete, begin with the identified outdoor skills and ask students to suggest some way of describing the commonalities among the listed skills. Acknowledge all responses, but guide the discussion towards the stated definition. As each Skill Set is described by the students, summarize the findings with 4-5 key points from the CSS definition. Be sure to identify these points clearly to the group.

Step 4 – What about integrated skills? Choose one item that the group placed in multiple CSS and walk students through the logic. Check for understanding by utilizing a second integrated skill from the list. Guide their response accordingly.
Closing – Have students return to their notes from the beginning and review their answers. Ask 1-2 volunteers to share any discrepancies that have been cleared up. Ask another 1-2 to share their initial questions and check to see if they still exist. Review accordingly.

Competency Levels
This initiative helps students realize the skill of accurate self-assessment by highlighting what would be expected from another instructor. For example, when a person attends a kayaking clinic they have certain expectations relative to an instructor’s ability. One of the most effective ways to uncover competence is to have students identify their own level of competence through an initiative that insists they self-assess.

Instructor Notes:
Desired Learning Outcomes – This event is designed to HS: Improve our ability to assess personal skills, local context, and intended audience accurately, and adjust instructional strategies accordingly; and ES: Deepen their awareness of their own instructional and leadership capacities.
Time Requirements – Approximately 45-60 minutes.
Location – This initiative is best done prior to field courses.
Resources – Whiteboard.
Instructional Caveat – Anyone teaching this initiative must have cognitive mastery of the levels of competence presented in Nicolazzo (2007).

Framing: How do we know when we are ready to lead? How do we know when we are skilled enough to teach? Can we identify what “skill mastery” means? Let’s take a closer look...

Step 1 – Reflect on past teaching: have students identify and write down a topic that they have experience teaching in a field setting. Next, have the students identify their level of expertise with that topic on a scale from 1 to 5 (1 = low level of expertise and 5 = very high).

Step 2 – Introduce the levels of competence rubric (Nicolazzo, 2007). Draw the table and ask the group to define each level. Guide the discussion to follow the actual definitions.

Step 3 – After checking for understanding, present a hypothetical. Ex. If you were to attend a whitewater kayaking instructional workshop, what level of competence would you expect your instructor to have and why?

Step 4 – Have students return to the initial self-ratings of expertise relative to field topic (in Step 1) and note how high or low they rated themselves.

Step 5 – Number the levels on the board 1 through 5.
1 - Unconscious incompetence
2 - Conscious incompetence
3 - Intuitive competence
4 - Conscious competence
5 - Subconscious competence
Closing – The initiative will highlight the work and preparation that needs to be done prior to an upcoming field course, assuming students hold themselves at the same level of expectations that they expect themselves. This closing will be fairly obvious to both instructor and students. Discussion and the level of questions will reveal how comfortable students are feeling.

Establishing Desired Learning Outcomes (DLOs)
Desired Learning Outcomes form a key element of the Design Cycle in Outdoor Education – what do you want your students to feel, do, or know as a result of your event? An event without a clearly defined DLO may be fun, students may develop learning, but the actual outcomes are solely dependent on the group structure – the participants themselves (and the learning may or may not be what the instructor intended).

Instructor Notes:
Desired Learning Outcomes: Students will: (HS) be able to discuss their own instructional and leadership capacities; (ES) improve ability to Design, Implement, and Evaluate effective event plans; demonstrate competency in developing and evaluating DLOs, progressions, and control plans;
Time Requirements: 65 to 75 minutes. May be a fair bit longer depending on group size or how the instructor wishes to shift the activity.
Location Requirements: Classroom or field.
Resources: A whiteboard.
Instructor Caveat: Instructor must understand the learning domains concept and have mastery in establishing their own DLOs.

Framing
What do DLOs do for us? Discuss the basics of the design cycle (assess—identify—design).

Step 1
Check-in with student’s current understanding of the Core Skill Sets (e.g., Quiz?) and ask students to recall the teaching topic selected during the Competency Levels initiative.

Step 2
Allot 7 minutes for students to craft three DLOs for their chosen teaching topic. Set aside.

Step 3
Next, introduce the key DLOs concepts and expand as necessary:
1. Utilize Core Skill Sets.
2. Work within your competency level as an instructor.
3. Appropriate for Local and Isolated Context (audience, setting, time, etc).
4. Focus on products, not process.
5. Refer to Learning Domains.

**Step 4**
Provide a sampling of DLOs from a previous student event as a context for discussion, and work together to apply the key concepts as a group.

**Step 5**
Introduce the Skills Matrix (next page). *SubFrame*: Now that we can identify what we want the students have after an event, we must identify what skills the participants and instructors must possess to be effective in their roles. Discuss an example, e.g., stove operation.

**Closing:**
Have students return to their three DLOs and apply the key concepts, including a new Skill Matrix, by the next class session.

---

**Event Anatomy**
Each field initiative has distinct parts, each part with a specific purpose. This initiative breaks each down in an effort to assist students in preparing their field events.

**Instructor Notes:**
*Desired Learning Outcomes* – To gain a working knowledge of an event’s key parts and pieces and what each part does.
*Time Requirements* – 45 minutes +
*Location Requirements* – Classroom or field; this initiative goes best if the instructor has asked students to research their field topics beforehand.
*Resources* – Whiteboard and/or something for all to write on.
*Instructor Caveat* – A command of event anatomy and how it is structured. Some instructors may chose to do this initiative after desired learning outcomes and basic instructional strategies as both are closely connected to event anatomy.

**Framing**
Explain the three basic components of Events: Structural Units (FAC), Progressions, and Nesting. Note that this event will focus on the structural units as the beginning of the micro to macro design progression. Write "Framing - Activity - Closure" on the board. Share the outcomes for your audience clearly. Then, have students identify one of their assigned topics as the context for this event.

**Activity**
**Step 1** – Through dialogue with the group, connect the terms, FAC, to other similar phrases they have used or heard of in the past. Some examples may include: beginning-middle-end, intro-body-conclusion, frontload-initiative-debrief, and so on. Accept all answers and spend only a modest amount of time shaping responses to FAC.

**Step 2** – *Framing*: Integrating SPEC into an event requires a significant effort from the instructor to engage the audience authentically. Ask students to reflect on their current topics and ask how they plan to garner interest in the topic (motivation for
their audience?). On a sheet of paper, have students briefly explain how they plan to introduce the topic.

**Step 3 – The Activity:** Ask students to quickly list the main activities and initiatives they intend to use to teach their topic on a sheet of paper.

**Step 4 – Closing:** Ask students how they might go about ending their event when they feel the event it is over. How will they know it is over? Ask them to jot down a few ideas on how they plan to wrap up.

**Step 4 – Move into a brief conversation on the key concepts within FAC.** Be sure to engage the students in dialogue, allowing them to identify concepts as they are able.

Explain the key elements of framing:
- Share the DLOs
- Identify any safety concerns
- Explain rules & boundaries
- Must be suited for participant’s frame of reference

Explain the core concepts of the Activity:
- It is the primary teaching tool thus, length should be substantially longer than the framing. Indeed, some events string multiple activities together;
- Use basic instructional strategies, including a progression that falls within the instructors’ existing skills progression.

Explain the core concepts of Closing:
- Based on what happened (thus one must take good notes during the event)
- Loops back to framing, and also connects to immediate future
- Reinforces lessons learned without introducing new information
- Effective closures tend to be short, to the point, and simple
- In-depth reflection is necessary ONLY when values, beliefs, or learning strategies have been challenged severely.

**Step 6 – Ask for a volunteer to write what is on their sheet of paper on the board and diagram FAC using their work.** Have each student do the same. Remember, this is the first time students will see a “micro block."

**Closing**
Briefly recap the key elements of FAC; check for understanding. Explain that this initial "block" serves as the platform to layering on the concepts among site management and the outcome model. Instructors may choose to incorporate instructor “check ins” and transitions in this initiative as well. If no questions, move on.

**Basic Instructional Strategies**
The application of student-centered, problem-based, experiential, and collaborative learning events can be made more effective through the intentional use of several specific strategies.

**Instructor Notes:**
Desired Learning Outcomes: To develop mastery in applying several practical methods for integrating SPEC and the Outcome model approaches into field events; to provide yet another opportunity for group collaboration.

Time Requirements: 60 minutes +
Location Requirements: Classroom or field
Resources: A list of the strategies and a whiteboard.
Instructor Caveat: This instructional block is reserved for those instructors with experience. New instructors should shadow this event multiple times and continue to gain experience. Further, this initiative should follow a discussion and work on event anatomy (Framing, Activity & Closure).

Framing: Knowing specific techniques and developing mastery through repeated application is the main focus of this event. The BIS were developed through a blending of the SPEC descriptions in *The Backcountry Classroom* and the Basic Outdoor Education Strategies described by Nicolazzo (2007).

Activity
Step 1 – Ask students to recall a previous lesson that spoke to them and analyze the parts of the lesson. Have them attempt to extract the teaching strategies utilized by the instructor and describe how those strategies made the lesson more effective.

Step 2 – "How do we integrate this strategy into teaching this topic?" Ask students to identify a field topic to analyze together. Work through 1-2 instructional strategies (explaining key elements), and then have the group apply the strategy to the topic illustrated on a whiteboard or via discussion.

Step 3 – Individual Application: Pass out a list of the other strategies with brief descriptions among the students. Have each student choose at least two strategies. Some duplicates are OK. Ask students the same question: "How do we integrate this strategy into teaching this topic?" Provide 30-40 minutes for students to apply the strategy.

Step 4 – Bring students back together and have each share how they applied one strategy. Ask the larger group to provide feedback from a learner’s perspective. Discuss hazy areas and refine understanding as needed.

Closing: Encourage students to watch for the BIS in other’s presentations as an effective means of gaining insight into how to apply the strategies to their own topics. The instructor may utilize a pop-quiz style of learning confirmation. For example, once one student has presented, the instructor may turn to another and ask how they might go about using the same strategy.

Situational Assessment
Developed by Chris Bullard, 2010.
Judgment is something that cannot be taught. There is no curriculum that someone can use to develop judgment in you. Judgment comes from experiences in the field. There are models that one can use when assessing situations and making informed decisions. How can we use SSRSR when making decisions whilst building judgment?
Instructor Notes:

**Desired Learning Outcomes** – (HS) Knowledge of one's ability to make sound judgments; developing ability to identify shifting variables that affect decision making; (OS) Able to articulate what situational assessment means, and gain practice utilizing situational assessment to make sound decisions.

**Time Requirements** – 1 hr. The group must be mentally alert and ready to think critically.

**Location Requirements** – Field or classroom.

**Resources** – Note Cards with SSRSR on them, Whiteboard (why not?)

**Instructor Caveat** – This is an information heavy lesson, one must make an effort to bring in relevant group experiences to keep them on track and engaged. Instructors must be transparent in their decision making process to give students food for thought.

**Framing:** Describe a scenario and ask the group to walk me through their decision making process. Where does judgment fit into decision-making? Do you have good judgment? Why? Situation? Wouldn't it be nice to have a simple, streamlined way to make decisions given our lack of sound judgment?

**Activity**

**Step 1** – Introduce Situational Assessment. Walk through each letter of the acronym giving examples of what each letter stands for and how it is appropriate for decision-making. What skills are necessary for completing the Assessment?

**Step 2** – Break group into 2 groups. Each group must think of a decision that the instructor team made and identify the components of Situational Assessment in this decision. After identification of the components they must then explain their answers to the other group. The other group can debate back whether or not it is important to the situation. Switch Roles.

**Step 3** – Is the Assessment useful? Why? Why Not? Is anything missing?

**Closing**

- What is Situational Assessment? How do we use it?
- How can we all develop better judgment?
- In every decision the instructor team makes, feel free to ask why. We will run down the Assessment with you. If you are asked to make a decision, utilize what you have just learned and put it into practice.
- Any questions?

**Instructor Positioning Systems**

An instructor’s position can influence the quality and safety of event management, accuracy of assessments, feedback effectiveness, hazard recognition, group development, and can determine whether a site can be managed safely as a moving or stationary site.

**Instructor Notes:**

**Desired Learning Outcomes:** Understand that where you are physically and emotionally will have great influence on your effectiveness as an outdoor instructor;
practice in assessing a simple situation set up by the instructor; practice integrating instructor position in site management strategies.

**Time Requirements:** 60 minutes +  
**Location Requirements:** Best introduced in the classroom and followed-up in the field. A field laboratory such as a river crossing would be most effective.  
**Resources:** Writing materials to help illustrate movement, e.g., field whiteboard, etc. Gear and equipment appropriate for the field setting. Best conducted at a location with at least 2 different hazardous locations that can be safely managed as stationary sites.  
**Instructor Caveat:** Experience. Folks teaching the mechanics of instructor movement should be well versed in such systems and have the field management background to be an effective mentor in such venues.

**Framing:** Prep students for fieldwork, ensuring proper personal gear and equipment and medical response necessities are available, prior to the event. Remind students of the group goal of Conscious Competence. Briefly review SSRSR as needed, and stationary/moving site differences.

**Activity**

**Step 1 - In the Field:** At a managed stationary site, assign 1-2 student instructors as group leaders. The task is to approach a "live" hazard with the group, conduct the situational assessment, adjust position as needed, and assist the group to navigate the hazard. The fishbowl strategy works well here - student leaders should think aloud through this exercise.

**Step 2** - Thank the student leaders post-experience. Discuss their approach with the group: was it managed properly? Was it "over-managed," were the leaders doting and too motherly towards the group? Was it under-managed and verging on transitioning to an unplanned moving site? Modify the variables and allow the group to discuss if the instructor positions shift. Examples may include:  
- Course phase: training, mastery, finals?  
- Participant biographics  
- Time of day: available daylight, time on trail  
- Instructor recon knowledge  
- Participant abilities

**Step 3** - Move to second site and ask for 1-2 other student instructors. Repeat Step 1 and 2. Continue to discuss as the situations get more complex.

**Step 4** - **Group Reflection:** In a safe and comfortable environment (classroom, shelter, etc.), review the basics of instructor positioning.

**Step 5** - Have students look back to the DLOs in their field events. Initiate a discussion relative to instructor positioning systems and those desired outcomes. What should be the positioning during these events? Ask students which type of site they will utilize for their events. How does this choice change instructor position based on known (or unknown) hazards? Seek out reasons for specific choices relative to the topics that will be presented.

**Closing**
Reinforce the importance of relationship building and assisting student in moving through skill training to mastery and eventually finals (these concepts must come prior to this lesson in most teaching progressions). Ask for questions and review as needed.

Self-Guided Learning Confirmation:

Identify the positioning strategies below:

1. ______________________
2. ______________________
3. ______________________
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Feedback Looping (FL)
Perhaps the most challenging skill, and most critical in leadership development, is the ability to create, share, and receive feedback. Effective feedback is achieved through a clear, meaningful, and objective (CMO) process. We do this by avoiding the subjective, the emotional and irrelevant, and couching our feedback in very clear and precise terms that have shared meanings – a common framework that is understood by everyone: Human, Outdoor, and Educational Skills.

Instructor Notes:
Desired Learning Outcomes – (a) Improved comprehension of the core skills areas; (b) The ability to articulate accurate, objective and critical feedback to peers and co-workers.
Time Requirements – Approximately 45-60 minutes.
Location – Field or Classroom.
Resources – A whiteboard would be helpful, but is not necessary.
Instructional Caveat – Mastery of CSS and significant field experience giving - and receiving - feedback of all kinds; significant field experience with FL specifically.

Framing: Why is providing critical feedback so difficult?
1. Great feedback is often dismissed due to lousy delivery;
2. It is tough to deliver feedback to those with whom we have a personal history with. Think about collusion and self-deception!
3. It is very tough to deliver feedback that is objective without practice.
Take a moment and briefly review the CSS.

Activity:
Step 1 - Group Scenario: Split students into small groups. Distribute Scenario 1 to each group: 
“Think on these questions as you read:”
What feedback did the supervisor have for Jill about her performance?
What feedback did Jill have for her supervisor?

Step 2 - Bring the class back together. Ask group to provide Jill with as much feedback as they can think of and list items on the board in categories (HOE). Help out if they need it so the HOE are all equally represented.

Step 3 - Explain the process of feedback looping.

Step 4 - Return to the small groups, have the students select one “leader” in each group. Then practice FL as a group using the following (or similar) scenario. The student “leader” takes the role of the instructor in the scenario and begins the looping process.

Step 5 - Once group is back together, check time and if ahead of schedule, ask a group or two to share and give the whole group another opportunity to get at HOE skill feedback in a new context.

Closing:
To close this initiative, simply go back to the DLOs and ask group if the activity was successful. Ask group to categorize the objectives according to the CSS. If group is successful, closing is appropriate.
**The Scenarios:**

**Scenario 1:**
Jill started working at a local climbing shop leading beginning trips for the local community. Jill was a good climber, safe, knew her skill set well, and had a great demeanor about her that people related to easily. All said, she was ready to begin the work it would take to become a great instructor. As part of her new job she was asked to co-lead a two day course that included rappelling. In the afternoon on day two, Jill’s supervisor approached Jill and asked her to instruct the rappelling portion of the course. Up to this point, there had been no rappelling in the course. Jill was somewhat caught off guard, but felt she was ready. Jill reviewed the notes she had taken on the group members and went about developing a game plan. Excited to employ the releasable rappel with a live/real group, Jill went about setting up the system and making sure the site was safe, which included a 50’ vertical drop with a hard edge. Once the system was in place, Jill went about assisting folks with their rappel. After the rappelling session, the group was safely on the ground and seemed very happy. As Jill asked the group how they felt about their experience one of the group members said, “Whew…I had never been rappelling before and I was terrified, but I’m really glad I did it!” Once the group was gone, her supervisor had an opportunity to debrief the course.

**Scenario 2:**
Evan is an accomplished whitewater paddler. He has spent considerable time in both canoes and kayaks on a wide variety of water in the southern Appalachians, spending most time in playboats. He has also flirted with going “pro” as a kayaker, but was recently turned down. He is young, confident, sufficiently grizzled, and very sure of himself, sometimes appearing outwardly arrogant. He is now working for an outdoor education program as an assistant instructor and is on a 10-day river canoe course with 8 participants and another lead instructor. He is well-liked and generally accepted by the participants in the group. On Day 3 of the trip, Evan paddled in the next-to-sweep boat and had been watching a pair of students struggling to work together through most of the morning’s river section. As the group paddled into a series of low-flow, but technical Class I rapids (i.e., many pillows and obstacles) in a particularly rocky section of the river, the troubled students’ boat began to pinball off one rock then another. It finally got hung up on a large pillow rock and the two students got off balance and leaned upstream to catch themselves. The river quickly filled the boat and it began to bend around the rock. The students escaped unharmed and were able to stand cautiously in the 30” deep water. Evan steered his boat over to assist with a good-natured “siren” yell. He beached his boat nearby and quickly waded out to the students' boat, finding one student visibly upset and doing her best to hold back tears. The other student was quiet and making moves to get to shore. Evan and his boat partner first grabbed the rescue bag to begin setting up a z-drag (the first time Evan had to do so in a real situation). After surveying the situation again, Evan yelled for a few other paddlers and they excitedly applied their bodies to the pinned boat and muscled it free of the pillow rock. Once free, the boat began to head downstream and Evan jumped into the submerged boat to guide it through the rest of the rapid to the eddy at the bottom. No gear was lost, and no participants were physically harmed in this scenario.
Appendices

DLO Skill Matrix Blanks
Trip Information
SOAP Notes
Incident Form
Emergency Information
Consider whether you are open or closed to correction, whether you are actively seeking to learn and teaching enthusiastically when you have the chance.

Whether you are holding yourself fully accountable in your work, whether you take or shift responsibility when things go wrong. Whether you move quickly to solutions or instead find perverse value in problems.

Whether you are earning TRUST in those around you.

--- Lou Herbert, Leadership and Self-Deception
Use these blanks to help you prepare for your teaching events.

**Topic:**

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<th>Topic</th>
<th>Participant Competencies</th>
<th>Instructor Competencies</th>
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*NOTE: Determine EXISTING skill mastery in yourself and your ppts; NOT what they need, but what they already have that they will have to use relative to the topic.*

*We don't write Edu. Skills for ppts.*
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Additional Notes

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Patient Name: ____________________________ Date: ____________
### SOAP NOTE

#### SCENE

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#### LAST MEAL

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#### EVENTS

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### OBJECTIVE

#### EXAM:

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### VITAL SIGNS

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<th>Time</th>
<th>Pulse</th>
<th>Resp.</th>
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<th>Skin</th>
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<thead>
<tr>
<th>A = Assessment (Problem List)</th>
<th>A’ = Anticipated Problems</th>
<th>P = Treatment Plan</th>
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**ADDITIONAL NOTES**

Patient Name: ________________________________ Date: ________

________
GC Incident Report Form
Accident/Incident Report forms (I/A) are completed by OE Staff or program staff and normally signed by the injured party. Submit this form to the fulltime direct supervisor for review, presentation, and follow up by OE Staff.

Organization: Georgia College Outdoor Education Program

Program Type: Academic Class OC Program (circle one)

Program Location: ____________________________

Course/Program Name: ____________________________

Injured Party's Name(s): ____________________________

Age: _______________ ☐ Male ☐ Female ☐ Staff ☐ Student/Client

Incident Date: ___/___/_____ Time: ____:____ a.m./p.m.

Type of Environment. Check all that apply:
☐ Lake ☐ River ☐ Ocean ☐ Forest ☐ Cliff
☐ Challenge Course ☐ Indoors
☐ Other: ____________________________

Type of Incident: Check all that apply
☐ Near Miss ☐ Illness ☐ Injury ☐ Motivation/Behavioral
☐ Property

Did the patient leave the field? ☐ NO ☐ YES, Date: ___/___/____
If yes, provide the following information:

Evacuation Method: ☐ Unassisted ☐ Walking Assisted ☐ Litter Carry
☐ Vehicle ☐ Helicopter ☐ Other ____________________________

Did the patient visit a medical facility?
☐ NO ☐ YES, Outpatient only ☐ YES, Admitted

Did the patient return to the course? ☐ NO ☐ YES, Date ___/___/___

Property Damage?
☐ NO ☐ YES
☐ Vehicle ☐ Equipment ☐ Facility ☐ Other: ____________________________

Type of Activity. Check the activity at the time of the incident

Land ☐ Camping ☐ Solo ☐ Hiking or Backpacking ☐ Caving
☐ Biking ☐ Bouldering, Climbing, Rappelling

Water ☐ Swim/Dip ☐ FW Canoeing ☐ WW Canoeing, Kayaking, Rafting ☐ Kayak Touring

Challenge Course ☐ Group Development ☐ High Challenge Course ☐ Low Challenge Course
☐ Other (explain)

Other ☐ Service project ☐ Transportation ☐ Environmental Education ☐ Other (explain)
Type of Illness. Choose most significant
- Abdominal pain
- Allergic reaction
- Altitude illness
- Apparent food-related illness
- Chest pain or cardiac condition
- Dehydration
- Diarrhea
- Eye or ear infection
- Flu symptoms/"cold"

- Heat illness
- Hypothermia
- Nausea or vomiting
- Nonspecific fever illness
- Skin infection
- Upper respiratory illness
- Urinary tract infection
- Other (explain)

Type and Location of Injury. Select all significant types of injury and mark and label the affected areas on the diagram
- Athletic Injury (sprain, strain)
- Dental
- Eye injury
- Frostbite
- Head injury
- Near drowning or immersion
- Skeletal (dislocation, fracture)
- Soft tissue (bruise, burn, blister, wound, abrasion)
- Sunburn
- Other (explain)

Narrative: Provide a thorough description of the incident/accident to present a clear picture of what happened (attach extra pages if necessary).
1. Describe the context of the situation leading up to the accident. Address program activities, group dynamics, environment, etc.
2. Describe in detail the incident/accident. Provide specific information regarding the situation, extent of injury, mechanism of injury, witness accounts, etc.
3. Provide details regarding the immediate response and follow-up to the situation.
OE Staff Review:
OE Staff will review each Incident/Accident Report. Recommendations from the review are noted here.

Administrator Review by: ________________ Position: __________  
Print Name
Administrator's Signature: ________________ Date: ___/___/___  
Signature

Staff Name: __________________________________________

Signature: __________________________________________ Date: ___/___/___

Patient/Witness Name: __________________________________________

Signature: __________________________________________ Date: ___/___/___

Developed from WRMC Incident Data Reporting Form September 2001
Form Revised S11
There are three kinds of people: Those who learn by reading and the few who learn by observation. The rest of them have to pee on the electric fence for themselves.

- Will Rogers
Natural & Cultural History of Big South Fork
The primary mammals of the area are: White-tailed deer, gray fox, bobcat, raccoon, mink, striped skunk, muskrat, and eastern gray squirrel. Also game birds like the wild turkey and ruffed grouse can be found in the hardwood/pine areas.

Threatened and Endangered Species of BSF
The following are some of the federally or state endangered species: 6 endangered freshwater mussels, 2 endangered fish species both in BSF river. The River otter is a state wide threatened mammal. The Red-cockaded woodpecker is also a federally listed species.

Wildlife Concerns
- Poisonous Snakes are common on land and sometimes in the water in this area. Always wear shoes and use a light in the dark
  - Copperheads
  - Rattlesnakes
- Ticks are also common in the BSF area. Use DEET and always do tick checks. One risk with ticks is that they may carry Lyme Disease.
- Black Bears are present in the BSF. To ensure your safety, take the proper food storage precautions when camping. They were released as part of an experiment in 1996 to the BSF area.
- Poison Ivy can be found along the edges of roads and trails that we may encounter. In early spring, the leaves are red and it can grow as a vine or a shrub. It has 3 leaves.
Cultural and historical information

- Early Indians were the first people to live in BSF area. They were hunters, gatherers, and fishers. By 900 AD they started to experiment with growing crops.
- In the late 1700s and early 1800s Europeans used treaties to force Indians off the land.
- The European settlers began farming and their homes developed as they became accustomed to the area.
- Saltpeter mining was big in the area from 1813 to 1860. The rock shelters and caves of the area were used to gather saltpeter, which is an ingredient in gunpowder and of high importance during the War of 1812 and Civil War.
- March 7th 1974, was signed into law as the Big South Fork National River and Recreation Area protecting over 123,000 acres. There were about 40 households there with people living off the lands and sustaining themselves. Their land was bought from them and included in the park.
- August 25, 1991, the park was transferred from the Army Corp of Engineers to the National Park Service.

Interesting Facts/Attractions/People

There are over 300 miles of trails in the BSFNRRA.

Bandy Creek
Name comes from an old abandoned homestead in the area. The word abandoned was somehow shortened and corrupted over the years to become bandy.

John Litton Farm ------------------------------
John Litton built the log cabin around 1900. After that the Slaven Family took over the farm and added additions onto the house.

Rock shelters
Were once used by Cherokee and Shawnee Indians as hunting camps, and then as shelters by the European settlers. You may even notice small holes in the ground of the rock shelters, which are spots where people would grind up food into the rock.

Leatherwood Ford
Has been the main crossing of the BSF river since the early years of settlement. There is an old bridge that was built in line with the hiking trail, but with heavy rains, it floods out.

Angel Falls
An area where there are large rapids in the river that are formed by boulders. Angel Falls used to be a waterfall but in the 1950s, fishermen, to improve navigation on the river, dynamited it, supposedly.

O&W Bridge
The O&W Bridge was once a link in the O&W railroad. The railroad connected Oneida with Jamestown and to the west. It was 37 miles and was built in 1915 and then abandoned in 1954. The design of the bridge is called a Whipple Truss, and originally came from another railroad before being brought to the area. Not many of these styles of bridges are still around today.

John Muir Trail
The Cumberland Mountains were the first that Muir explored. He explored the area in 1867. The trail has blue blazes of Muir himself, which marks the stretch of the trail.
Charit Creek ------------------------------
Currently operates as a hostel and concessions area where you can get food. It was originally named after a girl Charity who drowned in the creek next to the lodge.

Jonathan Blevins
He is one of the early settlers of the area that lived in the Charit Creek/Station Camp area. He is buried in the Hatfield Cemetery and died from bee stings in 1863. Many other families lived in the Charit Creek area including Blevin’s own descendants and the Hatfields.

Twin Arches
They are two of the largest sandstone arches in the east formed by headward erosion in which a gully erodes up a slope. The arches are called the North and South Arches. The South arch is the highest with a height of 103 feet and a clearance of 70 feet. The North Arch is 62 feet high and has a 51 ft clearance. Arches form along the edges of the gorge where the sandstone is able to support itself as the layers slowly erode away. The arches are known as the largest arches in the BSF and some of the largest in the eastern part of the US.

Jake’s Place
Jacob Blevins (grandson of Jonathan Blevins) was the last to live here with his wife. He died in 1935 and both of them are buried in the Katie Blevins Cemetery near Bandy Creek. The House was dismantled and moved to Charit Creek. All that remains are stones from the old chimney.

Maude’s Crack ------------------------------
The crack connects with the John Muir Trail. It is named after a woman, Minnie Roysden (called Maude) who lived in the area with her husband. She found the crack when she was bringing lunch to her husband and other workers who were cutting trees in the gorge. The crack provided for a shortcut from her house to the gorge.

No Business
The area used to serve as an old community along the No Business Creek. There are old foundations remains from those who lived here. It existed as a community from 1796 until 1960. The Slaven family was the first to settle and last to leave there. At one time, the No Business community had about 300 or more people living there. Eventually resources started to deplete, and people dispersed from the area.
Tackett Brothers gravesite
They were two teenagers who lived with an elderly female relative in a cabin near Station Camp Creek. The boys were in constant danger of being drafted into the Civil War. To hide the boys, the woman put them under the mattress and laid down on top pretending she was sick. The confederates who came to her house eventually left. When she got up, the boys suffocated to death under the feather mattress. The tombstones are hand made and located near the Charit Creek Lodge.

African Americans
By 1850, there were 39 African American slaves counted in the BSF area. Most of them worked as miners, tilling lumber, or building the railroad and were very important to the development but were behind the scenes for most of it. A lot of the African American history of the area was either lost or neglected.

Blue Heron
Also called Mine 18, Blue Heron is an abandoned coal mining town. Operated from 1937 until 1962 with the Stearns Coal and Lumber Company. From 1900- 1920, Stearns Coal and Lumber Company extracted a great deal of coal and lumber from the area. It abandoned the area in 1962. The buildings were either destroyed or decayed on their own. The community was recreated in the 1980s with an outdoor museum replicating the original area.

Cemeteries
There are a total of 58 cemeteries located throughout BSF area. 26 are private and family owned. As people in the area became more literate over time, the burial practices started to resemble what we do today. Before that, they were hand carved tombstones, or raised coffin-type graves.
Glossary of Key Terms
Basic Instructional Strategies

Blocking and Nesting

Challenge

Competency Levels

Core Skill Sets

Corral zones

Desired Learning outcomes

Feedback looping

Field vs. Administrative Lenses

Framing-Activity-Closure

Instructor cycle

Instructor positioning

Leapfrogging
Learning confirmation

Learning domains

Moving sites

Outcome Model

Parking

Pause

Progressions

Safety & Education

Site Management

Situational Assessment

SPEC

Stationary sites

Transitions
Sources:


Web Addresses:

http://www.nps.gov/biso/historyculture/index.htm


http://www.weainfo.org/wea-curriculum
Emergency Information

In case of emergency requiring assistance in the field:

3. First aid will be administered by trained personnel and in accordance with procedures set forth by the training organization.
   a. A Wilderness First Responder shall be present at all outdoor education programs that operate in wilderness contexts.
   b. A first aid, epinephrine administration, and CPR-certified person shall be present at all outdoor education programs in non-wilderness contexts.

4. General emergency response procedures shall include:
   m. Survey the situation.
   n. Eliminate dangers or remove people from dangerous situations.
   o. Develop an action plan taking into account the nature of the emergency, size of group, terrain, weather, time and distance from help, etc.
   p. Implement first aid, rescue, or search procedures as appropriate.
   q. Triage multiple patients to determine who to help first based on two criteria: 1) triage implies making the most efficient use of available resources and 2) do the most good for the most people.
   r. Attend to the physical and emotional needs of group members.
   s. Consider setting up a temporary base camp and keep the group informed, protected from elements, well-fed, etc.
   t. Keep group members safe and busy to reduce anxiety levels.
   u. Complete appropriate forms, e.g., incident report, SOAP note, etc.
   v. Obtain written statements from eyewitnesses to the accident and ask for signatures and printed names at an appropriate time;
   w. Facilitate emergency debrief with group members as needed.
   x. Communicate with the field supervisor or administrative backup continuously.

External Assistance

4. If the group is unable to manage an emergency situation on its own, external assistance shall be requested in consultation with the field supervisor or the administrative backup.

5. The field supervisor, administrative backup, or program staff will manage a request for external assistance and related logistics based on context and the nature of the emergency.
   c. Call 911 and ask for emergency personnel.
   d. Notify appropriate land management authorities (ranger, forester, etc) listed on the Route Plan.

6. If phone access is not available a messenger party should be sent to the most effective point of communication.
   l. Leave at least one medically qualified person with the patient.
   m. If possible assign three members to the messenger party including one staff member.
   n. Carry detailed information about the location of the accident or emergency response base (coordinates, map, description, etc.).
   o. Carry detailed information about the context and the situation.
   p. Carry field supervisor or administrative backup contact information.
   q. Use a SOAP note.
   r. Carry supplies and equipment as appropriate including, but not limited to food, water, extra clothing, and emergency shelter;
   s. Move quickly but without rushing.
   t. Avoid potential injury.
   u. Avoid splitting up.
   v. Conserve energy to lead the rescue party back to the emergency base camp.
Emergency Contact Information:

GC ODED Field Supervisor System: Pager #: 866.647.3157

Sheriff Ph#: Scott County (423) 663-3111

Campground Ph#: (423) 286-8368

Ranger Station Ph#: (423) 286-7275

Air Evac. Site: Bandy Creek Visitor Center or Charit Creek Lodge or No Business Valley

Hospital #: (931) 752-5762

Hospital: Jamestown Regional Medical Center

Directions to Hospital:
N on TN-297 W/Leatherwood Rd (13.1 mi)
Slight R toward TN-154 S/Pickett Park Hwy (151 ft)
L onto TN-154S/Pickett Park Hwy (7.0 mi)
R to stay on TN-154 S/Pickett Park Hwy (2.2 mi)
L onto TN-154 S/US-127 S/N York Hwy (2.0 mi)
R onto W Central Ave (0.7 mi)
Jamestown Regional Medical Center
436 W Central Ave
Jamestown, TN 38556
Learn the principle, abide by the principle, and dissolve the principle.

In short, enter a mold without being caged in it. Obey the principle without being bound by it.

LEARN, MASTER, AND ACHIEVE!!!

— Bruce Lee