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ADVENTURES IN CREATING AN OUTDOOR LEADERSHIP CHALLENGE
COURSE FOR AN EMBA PROGRAM

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ABSTRACT

Outdoor-based experiential training (OBET) experiences are a relatively new way to develop executive leadership potential. This paper documents the evolution of several OBET events over a three-year period in a prominent Executive MBA program. Along the way, we document what the designs and outcomes were for each OBET course. It is our hope that this paper will encourage others to experiment and share their own OBET experiences so that the potential of this approach can be realized, particularly in the area of evaluative studies.

I am a professor of management who is responsible for the leadership development aspects of our Executive MBA program in the College of Business at the University of Tennessee. Since we believe that leadership potential is “caught more than taught,” we pursue a rather eclectic approach to leadership development which focuses on providing opportunities for our students to improve their leadership competencies, but also encouraging examination

and development of one’s moral compass, or leadership character.

Specifically, we pursue a fourfold approach to leadership development as proposed by Jay Conger and Beth Benjamin (1999). Conger and Benjamin argue that previous mono-dimensional approaches to leadership development are limited in their impact. They propose that comprehensive leadership development programs: (1) expand conceptual awareness, (2) provide comprehensive and constructive feedback, (3) offer skill-building sessions, and (4) provide personal growth opportunities. Please refer to Table 1 for further details about these four approaches.

Our “capstone” leadership development session incorporate all four of these approaches into a daylong, outdoor leadership challenge course each September. Similar to increasing legions of corporate trainers (Cross, 2000), we see this approach holding much potential for executive education. Previous research suggests that this approach holds potential to positively influence managerial attitudes (Halterman & Sampson, 1992), increases trust within teams (Reina, 1995), and even helps to realize leadership potential (Buller & McEvoy, 1990). The purpose of this paper is to describe how this course has evolved and identify the lessons learned so that other faculty and trainers interested in experiential learning can benefit from our

Table 1
Typology of Leadership Training Methods

Training Approach	Typical Learning Methods	Typical Designer Backgrounds
Conceptual Awareness	Written and video case studies, lectures on conceptual models, discussion groups	Academics
Comprehensive Feedback	Observed exercises; fishbowls, survey and verbal feedback from trained observers	Psychologists
Skill building	Practice exercises, simulations, lecturettes, modeling by trainers; video case studies	Corporate Trainers
Personal Growth	Outdoor or indoor adventure exercises with emphasis on reflective learning, risk taking, teamwork, and personal life goals.	Adventure-based trainers

Source: Jay Conger & Beth Benjamin (1999)

experience.

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FIRST ADVENTURE: MOUNT LECONTE HIKE

In 1999, we expanded our outdoor leadership development activities beyond the traditional ropes course, classroom discussions, and assessment activities. With our close proximity to the Great Smokey Mountains, we focused this program around the metaphor of mountains and mountain climbing. We hired Ed Bernbaum, a world-class expert on sacred mountains and co-leader of Wharton's EMBA alumni trip to Mount Everest base camp in Nepal, to

The next morning, we rose early at 4:00 AM, ate breakfast, and then were on the hiking trail well before the sun rose. It was very dark so we used flashlights. The purpose of this early start was to give us time to walk the 14 miles trek in one day and to push the students outside of their comfort zone and have to rely on each other to deal with the darkness. At around 6:00 AM, the sun rose in glorious splendor. Fortunately, the weather was sunny,

work with us on our design and co-lead the actual trek. Ed lives and works out of Berkeley, California.

The evening before the event, we transported our 22 EMBA students and six faculty and staff to a hotel in the foothills of the Smokey Mountains. There, we briefed the students about the events for the next day. Next, Ed showed an impressive set of slides of mountains throughout the world and ended up with some exciting pictures of the Smokey Mountains (refer to Bernbaum, 1997 for details). We ended our preparations by assigning the students into teams and giving them a series of exercises that they were required to practice on the next day. These exercises are described in further detail in Table 2.

Around lunchtime, we scaled the nine-mile climb and arrived at our destination – the top of Mount LeConte. There, we had a hearty lunch at the top and then relaxed in the warm sun, cool breeze, and comfortable grass. An optional exercise at the top was for students and faculty to gather in a circle and share a story, quotation, or thought about what was most meaningful to them as leaders. Roughly half of the group participated in this, but it was a

Table 2
Leadership Practices During the 1999 Mountain Trek

Practice #	Practice Name	Practice Objective
1	Balancing Goals and Process	To explore how leaders achieve goals while building relationships while traveling in pairs in the darkness
2	Positioning the Leader	To assign leaders in the front, middle, and back of the group and learn how the nature of leadership changes
3	Leading in Silence	To learn that leadership is mostly about communication, but communication isn't limited to conversations
4	Blending Perceptions	To learn that each member of the group brings a unique perspective to any challenge facing the group; even if they are looking at the same challenge
5	Making Meaning (optional)	To learn that leadership is more about values and purpose than it is about technique and efficiency

Source: Ed Bernbaum.

clear, and comfortable all day long.

At designated places along the way up the mountain, individual teams stopped to debrief their experiences with their faculty leader. For example, one person in the team was designated as the leader and s/he led from the front, back and middle of the group. Then we debriefed how leadership was different depending on where you are relative to the group. Over the course of the trek up the mountain, there were four such exercises and one optional exercise at the top of the mountain.

very moving experience for those involved according to student evaluations and faculty comments.

Next, we descended down another five-mile trail to some waiting vans. During this part of the trek, there was no formal learning program. After this descent, the students were driven to a nearby restaurant where we had a sumptuous, celebratory meal and listened to a local expert talk about the uniqueness and splendor of the Smokey Mountains. Around 10:00 PM, an invigorated, but physically worn out group of EMBA students returned to their hotel rooms.

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LEARNING LESSONS FROM FIRST ADVENTURE

In retrospect, several things worked and several things did not. In general, the students liked the novelty of this experience, but they felt that there were too many design and execution problems to make it truly effective (see Table 3).

There were several reasons for this. First, the faculty and staff were not experienced in debriefing adventure-based experiences. Second, the hike was too physically grueling for many of the students (even though all of them completed it). Third, the metaphor of mountains did not resonate with the students as we had hoped. Fourth, there was no body of leadership skills or concepts to frame and

Table 3
Student Evaluations of 1999 Leadership Mountain Trek
(N = 13)

Criterion	Average Response	Standard Deviation
1. The readings assigned were valuable and thought provoking	4.3	0.7
2. The student leadership insight presentations were valuable and thought provoking	4.4	0.8
3. Ed Bernbaum gave valuable and interesting insights, new thinking	3.5	0.9
4. Ed Bernbaum gave useful and new ways to think about business	3.4	0.6
5. John Molloy's talk was valuable and thought provoking	3.1	0.8
6. Leadership activities done up the mountain were valuable and thought provoking	3.5	0.6
7. Overall, this was a valuable learning experience.	3.1	0.5
Comments: <ol style="list-style-type: none"> 1. Excellent break from the classroom. It was very well organized. Fit in with practical applications. 2. A ropes course might be a better use of our time. We talked about leadership, but didn't do any leadership activities. There is substantial room for improvement here. 3. There was no leadership challenge. We were too pampered. Make this harder! 4. Keep this event. Staying on the top of the mountain the night before would have been great. 5. Terrific! Overnight on top would have been better. Set up teams with challenges and objectives to bring out leadership rather than just talk about it. 6. Experiential learning is more valuable than lectures and discussion. Couldn't we accomplish this in less than 14 miles? 7. Keep this with a focus on leadership. Split the hike into two days. 8. Excellent and well planned. Good ties to business learning. Timing to walk in darkness was an interesting way to start. Keep this with continuous improvement. 9. Definite keeper. Hats off to the faculty. Like the team activity – brought the group together like no other we have done previously. It would be beneficial to do this earlier in the year. The hike is too long. 10. Enjoyed this, but it was too long and tiring. Doing something outdoors is a good change of pace and gets the mind and body working. 		

What did work was that an innovative outdoor experience was fun and unique experience that was appreciated by students and the faculty. Student evaluations clearly indicated that it was a fun and memorable event. What did not work was that the hike was not a capstone leadership development experience for many of the students.

ADVENTURE #2: CHALLENGE COURSE NEAR SMOKEY MOUNTAINS

In 2000, we arranged for a daylong outdoor adventure-based leadership development experience in wooded areas in the foothills of the Smokey Mountains. This time, we hired five "New Horizons" staff, well-respected, local, adventure-based training organization that handled our ropes course training earlier in the year (New Horizons

focus the learnings. Fifth, there was no element of competition or evaluation so many of the students did not take the event seriously. Finally, two students sustained superficial, but not insignificant injuries to their face and legs due to exhausted falls at the end of the trip.

Center for Experiential Learning). Prior to the event, each of the 22 students self assessed him or herself using the Leadership Practices Inventory to determine where s/he was strong and weak on these five best practices of leadership (Kouzes & Posner, 1995). We framed the day as an opportunity to learn these five best leadership practices while competing with other teams to get the best results.

The day began early in the morning at 8 AM. The weather was drizzling, but not a downpour. We got started a bit late because one student failed to board the van on time and had to drive her car to our site. We provided an

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orientation to the day's events when she arrived and framed the day around three teams competing with each other to launch a rocket.

Each team had two evaluators, both part of the UTK faculty and staff. One evaluator observed the team in its efforts to get results. The other evaluator observed the processes used using Kouzes and Posner's (1995) five best practices of leadership. After each of the three initiatives, the evaluators would take time to provide some real-time feedback and evaluations to the teams.

The three initiatives were: (1) climbing up a steep cliff and rappelling down, (2) building a bridge to cross a small river bed, and (3) going on an orienteering trip through the woods while roped together as a group. During each initiative, the team members tried to recover components of the rocket as quickly as possible while focusing on the five leadership practices. Each event lasted approximately 90

This second iteration of the challenge course improved in several areas from the first challenge course. The tasks were more competitive, and less physically demanding – like their working world. The students received better

minutes. A public scoreboard posted results throughout the day of how each team performed.

At the end of the day, each team gathered in an open grassy field to assemble their rockets. Unfortunately, components for completing only two of the three rockets were available. Each rocket shot up and was promptly lost in the woods. After this event, the students and faculty gathered at a local restaurant to celebrate the day and reminisce.

LEARNING LESSONS FROM ADVENTURE #2

The student feedback from this event was more positive than the previous year, but there still were considerable rough edges. Specific student feedback is listed in Table 4 where we offer the aggregate student evaluations on a 1 to 5 Likert scale to a variety of questions. anecdotal reports about striking leadership lessons that they discovered over the course of the day.

However, there were some new problems that arose from this refined design. First, too many students stood

Table 4
Student Evaluations of 2000 Leadership Challenge Course
(N = 17)

Criterion	Average Response	Standard Deviation
1. The concepts/skills in these sessions are important for the work I am usually involved in	4.1	0.8
2. The concepts/skills in these sessions are important in preparing me to operate at higher levels in my organization	4.0	0.7
3. The activities for these sessions were effective in engaging me and causing learning to occur	4.0	0.7
4. The faculty leader was prepared and well organized	4.6	0.6
5. The sessions were well designed by the faculty leader and New Horizons	3.9	0.6
6. The sessions were well executed by the faculty, staff, and New Horizons	4.5	0.6
7. Overall, this was a valuable learning experience.	4.1	0.6
Comments: 1. Good experience. It was obvious how much work and planning went into this. If address rough edges, this can be fabulous. 2. The rain made this challenging in the beginning, but eventually the weather cooperated. 3. Overall, a good learning experience. However, the feedback on our team and leadership processes was biased and not constructive. 4. There was too much standing around between and during the events. Otherwise, a good day.		

feedback, and it was tied to a relevant set of leadership skills and concepts. Also, the rocket launch resonated better with them as a metaphor for leadership focus. Notably, the students could more easily see the connection to leadership development in this course than the previous year. Finally, the student evaluations generally agreed that this event was a fun and memorable event, and some students provided

around while others were active. This was especially true during the rocket launch at the end of the day where three or four worked while the rest of the class disengaged from the activities. Second, timing was unbalanced between each initiative. The rock climb took much more time than all the other events and was a bottleneck. This led to rushing some activities, and too much waiting around for others. Third,

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some of the less mature students objected to being evaluated on anything but the team's results. In other words, we failed to get across the importance of the leader paying attention to results and relationships. Fourth, the amenities for bathrooms and eating were too spread out to make this place logistically efficient. As a result, too much time was lost traversing engaging with bathrooms breaks and meals. Finally, we neglected to collect some post hoc data on the impact of the challenge course. Without this data, we really didn't have a means for evaluating impact (e.g., Keller & Olson, 2000).

ADVENTURE #3: CHALLENGE COURSE AT WHITESTONE COUNTRY INN

In 2001, we assembled in a third place in order to keep what worked in the past and improve on previous efforts. Working with the same New Horizons staff from the previous year, we assembled all the 29 students and six faculty and staff for this daylong event. Once again, we had the students pre-assess themselves using the leadership practices inventory, but we also included the students' supervisor's assessment. The day before the event, we handed this report out to the students to reflect on and to be clear about what their strengths and weaknesses were within this framework.

During the early morning ride to the wooded resort on the edge of the Tennessee river (Whitestone Country Inn) near the Cumberland mountains, we assembled the three teams of students into the three vans. During this shuttle operation, the students shared their personal goals for the day with their peers as well as jointly developed a team name. Upon arrival, the students ate breakfast and then attended a brief orientation for the day. The metaphor this time was that these three teams were competing with each other to build the first and best rocket that flies up in the air and strikes an on-coming asteroid that was hurtling toward the earth. To make this more visual, we showed the students a brief video clip from the movie "Armageddon".

The three initiatives for this day were: (1) rock climbing and rappelling event over a 90 foot high cliff (air), (2) object retrievals over a large pond (water), and (3) a caving expedition deep underground (earth). At each location, the entire team was engaged. Some members took on the physical challenges; other members tackled the intellectual challenges. During the course of the event, team members retrieved either money to buy rocket components, information on how to assemble the rocket, or coupons to

redeem at a "marketplace" where rocket components were available for sale or coupon redemption. Two of the three events were completed by lunchtime. Faculty evaluators were stationed at each of the three sites and staff evaluators traveled with each of the three teams. With this approach, we obtained comprehensive longitudinal evaluations across all 29 students and within each team. Ten minutes of debriefing was allocated for each event and this session was led by our adventure-based training staff.

During lunchtime, students had an opportunity to compare notes, trade money, information, or components with each other, or purchase rocket components for their teams. This all occurred in a large gazebo in the center of the resort grounds. This marketplace event engaged the entire team and brought more of a business connection to the training.

After lunchtime, the three teams each traveled to their third and last initiative using the same format as the morning sessions. Afterwards, they assembled back at a gazebo with a panoramic view of the surrounding tress and lake to enter their marketplace for the last time. From there, they proceeded to the launch pad at the top of a hill nearby and proceeded to assemble their rockets for launch.

At the conclusion of the day, the students ate a sumptuous meal near the launch pad in a private dining room. After the resort-quality meal, seven awards were presented by the faculty and staff evaluators to students who demonstrated excellence with each of the five leadership practices as well as an individual who demonstrated extraordinary character and integrity over the course of the day's events. Also, an overall team leadership award was given. In addition, the students gave seven awards to individuals for such distinctions as "muddiest person", "person who made most progress on his/her personal goal," and "person with best sense of humor." As such, evaluation was more focused on publicly celebrating accomplishments than embarrassing public discussions of failure.

LEARNING LESSONS FROM ADVENTURE #3

The anonymous student evaluations for this third attempt were universally positive. As Table 5 suggests, the day was seen as relevant to one's current and future job, well designed and executed, and a valuable learning experience. We are pleased with this strong student endorsement for this experience.

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Table 5
Student Evaluations of 2001 Leadership Challenge Course
(N = 20)

Criterion	Average Response	Standard Deviation
1. The concepts/skills in these sessions are important for the work I am usually involved in	4.5	0.6
2. The concepts/skills in these sessions are important in preparing me to operate at higher levels in my organization	4.4	0.8
3. The activities for these sessions were effective in engaging me and causing learning to occur	4.4	0.9
4. The faculty leader was prepared and well organized	4.6	0.6
5. The sessions were well designed by the faculty and New Horizons	4.5	0.6
6. The sessions were well executed by the faculty, staff, and New Horizons	4.5	0.6
7. Overall, this was a valuable learning experience.	4.5	0.5
Comments: 1. Great overall course. Tremendous planning went into this. I would have enjoyed having more people getting to rappel. 2. Fabulous day. Don't change anything. 3. Overall, the events did cause/create opportunities to learn. Having been to several outward-bound events previously, I did not have to debrief as much as others. The discussion seemed redundant to me, but it seemed to have great value to others. 4. Keep this event. If you applied yourself, you really got a great opportunity to stretch yourself and your leadership abilities. I would have liked to see more people get a chance to rappel. 5. Excellent experience. Don't change anything except to allow more folks to get to rappel. Food and location couldn't have been better. Thanks for the experience! 6. Put us on an island, give us limited tools, and ask the group to find a way off without swimming in 1 day. This course was a good step in that direction. 7. This was a fun and valuable learning experience. 8. The day was full, with a good variety of activities that engaged almost everyone. It is a better learning experience than a ropes course because of the variety of challenges. 9. This event was not as good for leadership development as the ropes course earlier in the year. However, the location was excellent and the challenges facing the entire team had more variety. 10. The activities could have been more physically and intellectually challenging to generate more interaction and learning. 11. Those who did not get a chance to rappel did not learn as much as those who did. 12. The object retrieval over the pond was too easy. You need to make this harder. 13. Excellent day. Very well organized. Only suggested change would be to use smaller teams next time. 14. The course, food and setting were outstanding. 15. This was a great teamwork exercise. The debriefs were especially helpful to me and my team.		

However, we didn't want to stop with real-time student feedback – we also wanted to see what the delayed impact might be. Toward that end, we required the students to each write a one-page, single-spaced essay on how, if at all, their leadership skills and concepts were transformed by this experience. This report was filed by the student over two months after the event. Notably, each and every student indicated that there was some development that had occurred. Many students connected their leadership development goals to this experience; some indicated new insights into classroom concepts; a few students experimented with new leadership skills and behaviors. The students were universally enthusiastic for this type of

learning. In the future, we hope to obtain feedback from their supervisors on changes observed after the course.

SOME CONCLUSIONS ABOUT OUTDOOR-BASED EXPERIENTIAL TRAINING

Our adventure into outdoor adventure-based experiential leadership training is not complete. Each time that we take this approach, we retain previous design issues and experiment with improvements. In future years, we hope to add quantitative learning outcomes to evaluate the learning success of our efforts using pre- and post-assessment devices by the students as well as their supervisors (Albertson, 1995). In addition, we are exploring

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the possibility of using more “virtual reality” scenarios to add more relevance to this venue (Campbell, Diamond, & Wagner, 1995).

We have come a long way with this experiential learning technique, however. Always seen as fun, it now is viewed as a creative and effective new way to explore executive leadership skills and concepts. The logistical and safety challenges of such an approach cannot be underestimated, but we refine and improve the learning experience for each revision of our challenge course design. Partnering with trained and experienced facilitators who collaborate with a faculty owner within the program is essential for success.

We hope that this paper helps others who are considering such a complex event are encouraged to experiment with this novel approach to leadership development and to benefit from our previous failures and successes. We feel that all three attempts have been superior to separate instances of classroom instruction, individual feedback sessions, or isolated skill building exercises. As such, this venue, if designed and executed carefully, can serve as a memorable and productive capstone leadership training exercise that can comprehensively transform executives to a higher level of leadership skill and understanding.

Due to its broad scope and higher complexity, a higher order of collaboration and teamwork with faculty and staff is also required as well. We remain encouraged and convinced that adventure-based learning has enormous untapped potential, but because there aren't many templates for this approach we must all experiment more and share our experiences on the lessons learned. Finally, evaluative studies on the impact of outdoor-based experiential learning training sessions is fundamentally important for making sure that the time spent is educational as well as fun.

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