

# IMPLEMENTATION OF EFFECTIVE EXPERIENTIAL LEARNING ENVIRONMENTS

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## ABSTRACT

*This paper applies the experiential learning theory of Kolb (1984), the sequential case study learning theory of Knoop (1984), the techniques of effective class role play (Gross Davis, 1993; Pike, 1994) and Rausch's (1999) recommendations for debriefing to a class exercise of graduate Hotel Administration students in teaching the necessity of crisis planning for hotel properties. Starting with the concept of four learning modalities presented by Kolb, we suggest introducing four instructional elements when developing effective experiential learning environments. As judged through qualitative assessment of student participation and the final product produced by the group as a result of its role play, the integration of these theories and techniques produced a dynamic, participative and productive environment. Presented first is a brief explanation of the theories, followed by a rationale for their use in this particular teaching objective, followed by detail of the manner in which the experience was framed, implemented, and discussed. While the role play presented is specifically aimed at demonstrating the critical importance of advance planning in responding to a crisis in a hotel setting, it is believed that the instructional model created herein may be generalized for application in other educational contexts.*

## INTRODUCTION

Experiential learning may assume many forms, from simulations to games to case studies or role plays. (Rausch, 1999) Instructional Designers may utilize experiential learning activities to teach the application of specific knowledge, encourage the utilization of knowledge in one area of study to another knowledge set, engage the affective domain of the learner, or push the level of participant learning to a higher level of what Bloom calls analysis, synthesis and evaluation (Cannon & Feinstein, 2005). Experiential learning environments foster an appreciation of the complexities of the workplace (Ettinger, 2001). It has been suggested that experiential learning is enhanced by the enthusiasm it first generates in the instructor, in turn

infecting the class with a greater motivation to learn the subject being presented (Gentry & McGinnis, 2007). Scalzo and Turner (2007) cited Dutton (1985) as advocating that the experiential format be applied to business instruction, creating an experimental laboratory for learning similar to that of natural science courses. It intuitively follows that if "education is the acquisition of the art of the utilization of knowledge" (Whitehead, 1929, p.6), opportunity to practice such utilization is a valuable part of the educational process.

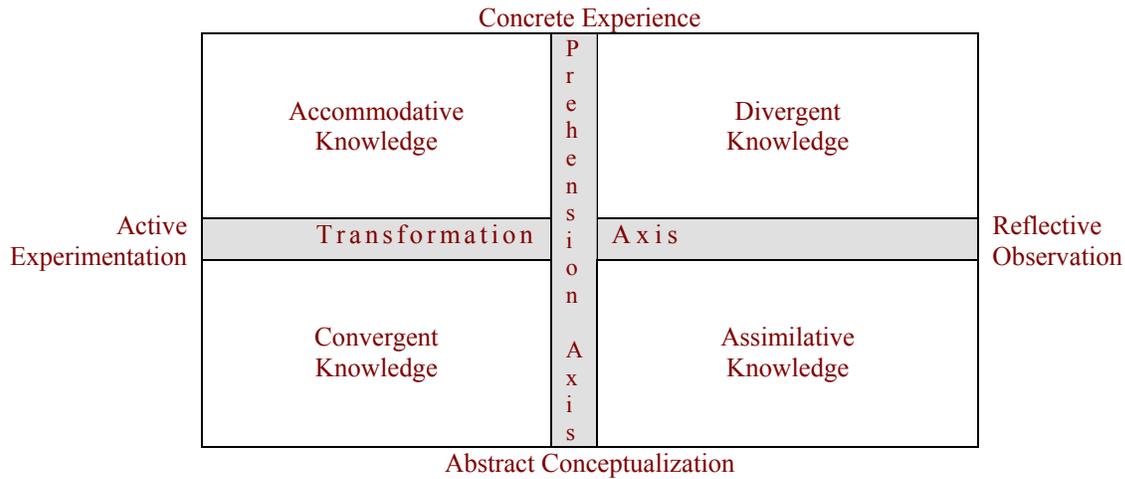
However, such experiences must be consciously shaped to assure that the optimal learning experience is presented. As cited by Scalzo and Turner (2007), Bowen (1987) suggests that such consideration include a) a tie to emotional arousal, b) the provision of a safe environment and c) sufficient processing or debriefing time so the process may be fully understood. When these elements are present, at least the minimal requirements are met so that students are immersed in a setting "in which they actively participate in acquiring knowledge" (Cannon & Feinstein, 2005, p. 349).

To move beyond the minimal requirements suggested above, we recommend that four elements must be considered when developing effective experiential learning environments. First, the design of the experience must be informed by learning theory, so all methods of learning are exploited. Second, the basic cognitive learning style of the participants in the class be considered (Ronchetto & Johnson, 1993). Third, as Rausch (1999) suggests, provide participants ample time to reflect on the experience both prior to and during the experience. Reflection prior to the experience provides opportunities to develop questions, concepts, and theories, to explore during the exercise; reflection during the experience provides opportunities for idea implementation.

Finally, a debriefing – oft referred to as "ill-defined, unsystematically used and not fully tested" (Markulis & Strang, 2003, p. 177) – process after the exercise should be implemented to provide participants a chance to reflect both on the experience and their behavior in it (Markulis & Strang, 2003).

What follows is a theoretically-grounded discussion defining the experiential learning model. We also discuss the importance of considering participants' learning styles to assure that Kolb's (1984) four theoretical learning

**FIGURE 1**  
**Kolb's (1984, p. 42) Model of Experiential Learning**



modalities are addressed. We include a discussion of the importance of providing focused opportunity for reflection as prescribed by Rausch (1999). We then introduce a case study and assigned role play as an example of the four element implementation. We conclude with a discussion on considerations made in debriefing to integrate direction provided by Markulis and Strang (2003).

### THEORETICAL EXPLANATION

Kreber (2001) notes that epistemological discussions related to education throughout much of the twentieth century have frequently focused on the interaction of objective knowledge with the experience of the learner (Dewey, 1938; Lewin, 1951; Piaget, 1952; Jung, 1971). From these and other theorists, the position that “knowledge results from the transaction between...objective and subjective experiences in a process called learning” (Kolb, 1984, p. 37) has led to an increased acceptance of experiential learning as a modality that seeks to combine these objective and subjective experiences (Kreber, 2001).

The model frequently cited in the development of experiential learning is that of Kolb (1984), who premised his work on that of Lewin (1951). In the model, Kolb first details the process of learner awareness by which, through either concrete experience or abstract conceptualization, a learner grasps an experience. This grasp, whether originating in the concrete, sensate realm, or the theoretical, abstract realm, must move to the abstract realm to give title and wording to the experience, thus allowing it to be remembered, recalled, and communicated.

Form, intensity, and conscious awareness of a learning opportunity shape the abstract way it may be conceptualized. That conceptualization necessarily has both objective and subjective elements to it. For purposes of this application, the philosophical ramifications of affect on knowledge are not explored; suffice it to say that the

experiential modality detailed below attempts to incorporate both of these realms into the exercise.

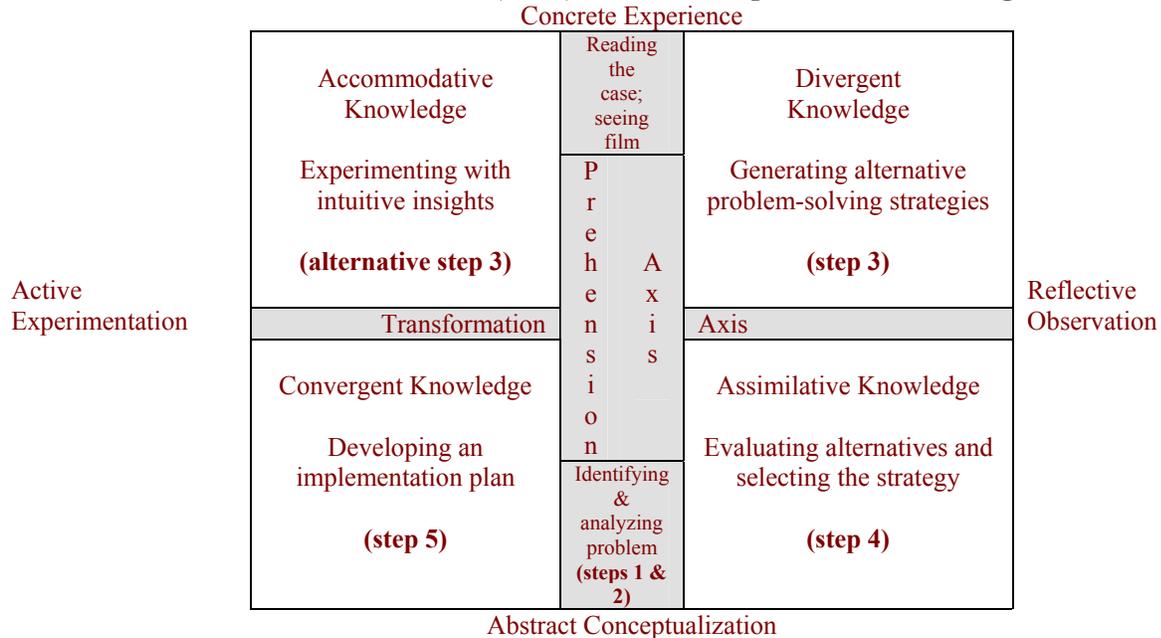
This concrete/abstract continuum represents one axis on Kolb's graphic model of learning (Figure 1). This awareness, Kolb (1984) suggests, only becomes “learning, the creation of knowledge and meaning” when the awareness is grounded for the learner, either by active application of the awareness in the external world or the internal reflection on the meaning of this awareness (p. 52). The manipulation of awareness, through extension, connection, classification, testing, or other active or reflective process is where learning occurs, and this continuum of active or reflective application represents the second of the axes in Kolb's model.

Kolb labels the first axis of awareness, as the “prehension” axis (p. 43) and the second application axis as the “transformation” axis (p. 51). From these two axes, four different ways of learning may be categorized. It is these realms of learning which are concern here, for it is postulated by Lewin, Dewey, Jung, and Kolb (Kreber, 2001) that the highest level, most fully integrated learning occurs when the learners progress through each of these quadrants. Therefore, a strength of experiential education is its ability to incorporate the concrete, sensate experience into the learning process, whereas much university teaching emphasizes only the conceptual aspects of awareness (Kreber, 2001). Although experiential education may be incorporated on solely an abstract, cognitive level, such learning does preclude two of the four types of learning identified by Kolb.

A specific sort of experiential learning is the case study. The same year that Kolb developed the theory summarized above, Knoop developed the *Pragmatic Problem-Solving Model* to be applied to the use of case studies in education (Kreber, 2001). The model involves 5 steps:

**FIGURE 2**

**Kreber’s (2001, p. 223) Model of Integration of Knoop’s (1984) “Pragmatic Problem-Solving Model” to Kolb’s (1984) Model of Experiential Learning**



- Step 1 Identifying the problem
- Step 2 Distinguishing the problem from its underlying causes and overt symptoms
- Step 3 Generating alternative problem-solving strategies
- Step 4 Evaluating each alternative; selecting the best strategy
- Step 5 Developing a plan for implementing the preferred change (Kreber, 2001)

Kreber (2001) proposed a model merging Kolb’s graphic model of learning with Knoop’s five-step case study model. Kreber offered that when students are presented with a case study, they are confronted with Kolb’s definition of a concrete experience (i.e., a real life experience). Consistent with the Kolb model, students must first identify and analyze the case, which represents the first two steps in Knoop’s model. Once the situation is examined and grasped, the case study approach calls for a brainstorming of possible solutions – Knoop’s step 3 – which returns the student participants to the actual experience under consideration. They may generate solutions through intuitively applying their own insights to develop a list of potential solutions in what Kolb calls “divergent knowledge” (p. 42), and also through building upon the shared ideas from others, as an example of “accommodative knowledge” (Kolb, 1984, p. 42). This sharing of ideas with others in the group is what Kolb would label “active experimentation” (p. 42). Once the group reaches Knoop’s stage 4, where they are evaluating alternatives, Kreber identifies the applicable Kolb mode of operation as “assimilative knowledge” (p. 42). Finally, when the students seek to apply their findings to the case study, Kreber

suggests that they are active with their abstract concepts, and thus operating in Kolb’s “convergent knowledge” (Figure 2) sector (Kreber, 2001, p.42).

The proposition that the use of case studies engage students in multiple ways of learning makes their use most attractive from a theoretical perspective. Their appeal is strong from a practical perspective, too, as they tend to engage students (Gross Davis, 1993). The case study may be from an actual situation and thereby provide some closure for students at the completion of the discussion, or they may be hypothetical which can serve to capture student imaginations (Gross Davis, 1993). In either case, their application features certain key characteristics:

- Tells a “real” story
- Raises a thought-provoking issue
- Has elements of conflict
- Promotes empathy with the central characters
- Lacks an obvious or clear-cut right answer
- Encourages students to think and take a position
- Demands a decision
- Is relatively concise (Gross David, 1993)

The final element that was included in the construction of this classroom experience was that of role play. Role plays can enhance the degree of involvement by helping to capture the affective and human dynamics sides of a situation (Gross Davis, 1993; Pike, 1994). The notion of casting all students into a common situation, such as a leadership committee at a resort, was advanced as a suggested manner of role play by Erickson and Strommer (1991). Pike (1994) details that such casting needs to include written details adequate to fully frame the situation for the participant, provide information on the specific role a participant is being asked to assume, and establish any

attitudes or concerns specific to the assigned role which should be incorporated into the role play.

## APPLICATION RATIONALE

The above theory was utilized in constructing a role play / case study of crisis management for hotel administration graduate students at UNLV. The hypothetical situation was a hurricane warning that had been issued for a beachfront property. Class participants represented leaders from different departments within the hotel. In addition to the theoretical underpinnings just explained, this method of presenting subject matter was selected for several specific reasons.

First, a hurricane scenario was chosen to represent one of the most damaging of all naturally occurring disasters for resort properties, and in certain areas, one of the most common (Burby & Wagner, 1996). Additionally, if a property has a hurricane plan in place, typically that plan is adequate for most other sort of disasters, due to the extensive planning requirements they demand, so for the broader lesson point of emergency preparation, hurricanes provide a good foundation for discussion.

Perhaps most importantly, hurricanes represent one of the few large disasters a hotel property might withstand in which there is advance warning, thereby allowing for some preparation. This preparation could include convening a group of top management within a resort a few hours prior to the anticipated arrival of the storm. This is a realistic, even likely, occurrence. The storm's hypothetical imminence helps to focus the discussion and demands prioritization of actions.

It is hoped that resort properties would have a response plan already detailed and ready for implementation. If there were the case, such a meeting would amount to little more than assuring all managers were doing as called for in the prepared plan. However, research done to prepare this educational module revealed that only 2.4% of hotel properties had a property-specific emergency plan which included written evacuation details (Drabek, 1995). The frenzied urgency represented in this case study is an important affective element desired to help illustrate the folly in trying to develop a plan at the last minute.

Second, although all students to whom this experience is targeted may be within the UNLV Hotel College, there are specialty units within the College that create what is sometimes called on college campuses, "silos" (Buchbinder, Alt, Eskow, Forbes, Hester, Struck, & Taylor, 2005). These specializations mean that within the academic setting there is limited opportunity for a student with financial expertise to learn the role of a food and beverage manager, or a hotel operator, or an accountant, etc. This role play was designed to allow each student to bring to the study their own expertise while requiring them to consider how that area interacts with the greater needs of the resort. Additionally, the exercise not only encourages, but requires skills of cooperation, collaboration, and interdependence – all qualities not necessarily fostered by "hierarchical specialty units" (Buchbinder, et al, 2005).

Third, as Kolb reported, majors tend to have a greater number of learners of one style (1984). He found managers tended to cluster in the "accommodative knowledge" quadrant (p. 167) meaning that they focused on the concrete in an active, experimental way. Observation of Hotel Management students would tend to verify such a learning style. Their career positions often demand they "think on their feet" and it is not uncommon to observe in them impatience with theory as their focus is clearly on the concrete and the immediate. We suggest that since each learner tends to favor his or her favored style, activity design needs to assure other styles are also built into the experience to satisfy Kolb's (1984) contention that the most thorough learning occurs when all four modalities of learning are utilized.

Therefore, a teaching modality that moves them through other learning styles is one that may be of benefit to their academic development above and beyond the specific lessons of emergency preparation.

## EXERCISE IMPLEMENTATION

The exercise was designed for 14 students – the number in the class - and a class length of one and one half hours. Each student was assigned a specific role corresponding to a leadership position in a 550 room resort hotel. While the size of the resort is not large by Las Vegas standards, outside of Las Vegas it would generally be considered a large resort, and its size assures that the full array of services and departments found in a typical resort would be present. For this role play, roles included: General Manager, Assistant General Manager, Business Manager, Conference Services, Engineering/Grounds, Food and Beverage, Front Desk, Housekeeping, Human Resources, PR/Marketing/Guest Relations, Secretary to the GM, Security, Technology Support, and Legal Advisor. If a greater number of students had been in the class, Engineering would have been split from Grounds, Public Relations/Guest Relations would have been split from Sales/Marketing, and an Executive Chef and a Spa Manager could have been added. If numbers demanded yet more positions, Assistant Managers in Food and Beverage, Housekeeping, Engineering, Human Resources and Security might be added, as these are the areas with the greatest usual workload in such situations.

At the class meeting prior to the role play, each of these individuals received a one to two page summary of their role. These are distributed to permit review of the information prior to class so time is not lost as they familiarize themselves with their roles. More importantly, it provides each participant time to reflect on the demands of his or her position prior to the start of the role play. Each sheet provides detail of their general responsibilities during regular operations, specific considerations for the position in regard to disaster preparation, issues that may be particularly important to the position as preparation plans proceed, additional notes relevant to the position as the hurricane approaches, and a brief summary of a personal situation each is asked to assume (such as the resort's

proximity from home, marital status, etc.). Each summary sheet also asks that the participant keep notes of what they understand their responsibilities to be. These summaries are included in Appendix A.

No instructions were given to participants about whether they were to conduct any research into what might be expected of their roles in the event of a hurricane. It was believed that, as in real life, a few might prepare themselves, but most would not without explicit directives. Two exceptions to this were made; the person serving as General Manager, a role which was given to the most experienced hotelier of the group, was briefed prior to class. This person was also provided the summary sheets for all other roles, and given instructions not to be explicitly directive in the conduct of the role play. Rather, this person was asked to serve in a facilitative role, drawing out opinions and concerns from other group members, advocating for interdepartmental cooperation, and reinforcing the urgency of the discussion. Other group members were not aware of these instructions provided to this position.

The person with the most experience with hurricanes, based upon inquiry in class of those who had been through such storms, was assigned the role of Secretary. A pre-class meeting was also held with this person, as this person was not an active participant in discussions. Rather, as the one position that did require some acting, they were to enter the room at various points directed by the instructor to introduce new elements to the role play, such as to inform the group that a television station was calling, that workers at the spa wished to close and head home to be with their families, that a telephone call had been received reporting a rumor that the storm was intensifying, that a union representative had called agitated that workers had not yet been released, that a participant's wife was insisting to speak to her spouse immediately, etc. This role was designed to re-create the fluid and unpredictable nature of the situation, as well as raise personal concerns that, in a real situation would likely be in the forefront of some individual concerns but which could otherwise be brushed aside in a role play setting. Selecting someone with hurricane experience to be placed in this role was done because they would have an appreciation for the sort of concerns their role was charged with raising in the exercise.

Assignment of other roles was made as near as possible to correspond to actual roles students held or had previous experience filling. When exact matches were not possible, related positions were assigned. For instance, individuals with operations experience might be assigned any of the operations positions. This past experience had been defined during the first days of class when the opportunity had been presented to discuss one's background and areas of expertise.

On the day of the exercise, students were seated around a conference table. A twenty-minute portion of a video special on the nature of hurricanes (National Geographic, 1994) was shown to set a tone and introduce the nature of the storms to anyone unfamiliar with hurricanes. This was supplemented by a handout detailing hurricane categories and anticipated hurricane effects as summarized by the

NOAA website. (National Oceanic and Atmospheric Administration, 2004).

Following the National Geographic presentation, a PowerPoint presentation briefly summarized the general level of hurricane preparedness done by resorts, and provided specific details, services, pictures, and a floor map of the Breaker's Hotel, in Boca Raton, Florida. This hotel was selected due to its location, its size, and its reputation as a renowned five-star resort. Pictures and maps were accurate representations of the property and this material was also provided in writing so participants could refer to it if needed. Finally, provided was a written and oral explanation of the imagined weather situation, anticipated storm strength, expected landfall time, and conditions in the immediate surrounds. The handout is included in Appendix B.

With that as a lead-up, the group was told that as leaders of this resort, they had been called together by the general manager to determine the necessary preparations required and the role play began.

The role play lasted the remainder of the class period – approximately one hour. At the end of the class, each participant was asked to prepare in writing his or her notes on what their duties and responsibilities were, as they understood them from the meeting, and the priority they understood or felt these duties needed to be completed. They were also asked to identify any questions or concerns related to their area of which they felt unclear or which they felt had not been sufficiently addressed. This report was to be submitted electronically 24 hours prior to the next class meeting.

The class meeting started with asking for general reactions to the experience. As noted above, this is a key element in maximizing learning (Markulis & Strang, 2003) so it was approached with a full class period available if needed to adequately discuss the experience. Questions were consciously designed to attempt to elicit a variety of information, including individual observations of the group process, exploring emotions associated with the exercise, assessing the adequacy of the plan developed by the group, and reflecting on how the information might be used in future situations. These questions followed the phases of debriefing suggested in part by Steinwachs (1992) and reported by Markulis and Strang (2003).

After general reactions were offered by group participants, the group was asked to discuss the relative weight the role play discussion had placed on human safety concerns and property protection issues. An opportunity was given to respond to the level of cooperation felt, and whether efforts seemed to dovetail or conflict between functional areas during the role play. Students were also asked to comment on strains they had felt between the professional responsibilities they held in their role and the personal situation that had been created for them as part of the role play.

The tremendous difficulty of trying to do such planning on a restricted timetable was noted, as a preface to the next section of the debriefing. It was noted that the group had been given an impossible task to fully complete – one of the

essential points to be made by the exercise. In the light of such monumental tasks in limited time, each role was then analyzed and compared to experts' assessment of each role's duties in disaster mitigation. The person serving the role was asked to summarize the responsibilities he or she believed had been assigned to them as a result of the meeting, whether there were other duties they felt they should not have, or perhaps should have in addition to those on their list. They were also asked if, given the time frame provided in the mock situation, they felt they would have had time to complete all duties assigned to them. After each person debriefed his or her individual role, then expert opinion of responsibilities normally assigned to each role was provided via power point.

### **APPLICATION OF THEORY TO THE EXERCISE**

Knoop's five steps of case analysis (1984) is the natural flow of most case analyses, and as shown above, these five steps lead participants through the four conceptual modalities of learning identified by Kolb. However, the structure of this exercise was designed to further emphasize certain stages thought to be important to participant learning. By presenting students with their role assignment prior to the role play, we encouraged more time in Knoop's first two stages of problem identification and distinguishing the overt problem and the underlying ramifications. It was also an attempt to obtain student buy-in for the case study, the success of which was to be judged by active involvement in the case discussion during and after the role play.

Based upon previous observation of hospitality student behavior, and noting their tendency toward the concrete and active, this was considered a way to encourage that the reflective and the abstract were not discounted. Likewise, the assignment of preparing the paper detailing student understanding of their role's duties as a result of the role play and asking them to consider if additional considerations had been overlooked in the development of the hurricane plan, again encouraged reflection and abstract consideration.

Clearly, Gross Davis' prescribed characteristics of a good case study (1993) were present throughout, as the case was a thought-provoking and realistic story with elements of conflict, no clear-cut answers, and significant time constraints manner. The addition of personal elements to the situation, as detailed in the role assignment sheets and further emphasized in the role of the Secretary, also encouraged an empathetic understanding of the difficult situation faced by leadership in such a situation. The dimensions of the situation were illustrated through the National Geographic video (1994), which helped provide a concrete understanding (Kolb, 1984) of the situation, as did the property pictures and maps.

The manipulated roles of the General Manager and the Secretary also provided an element of control to assure the experience stayed on track and allowed Knoop's third,

fourth and fifth stages (1984) to be fully explored and developed.

### **RESULTS**

The success of this exercise was judged in four ways. The first was the demonstrated understanding by the student of his or her role and active participation in the role play. Since a portion of the exercise was a demonstration of the need for pre-planning prior to the presentation of an impending crisis, the quality of the solutions developed in the case study was of less importance than the expressed understanding of the magnitude of the problem as the case study progressed. This was evaluated holistically, although in future applications of this exercise, a rubric to assess each student's engagement and contribution might add more precision to this evaluation.

Happily, students appeared ready for the case study upon arrival and the National Geographic video seemed to further energize the group, for discussion advanced quickly once the case study / role play started, and distancing comments (such as "If I were really in this situation...") were not present. It was expected that the person in the role of General Manager would need to actively encourage a consideration by the other roles of the ramifications their needs and suggestions had on other roles. This proved not necessary, and the collaborative needs an impending storm would necessitate in real life were present throughout the discussion, breaking down the "silo" effect of subject specialization (Buchbinder, et al, 2005).

The role of the Secretary also served the purpose intended. Role players responded to the additional elements introduced by this person by integrating those elements in manner that demonstrated in observable ways that the introduced elements were being taken into consideration. For instance, there was a notable consideration shift when one of the role players was told that his wife had just called, concerned for her safety and that of their child (this was perhaps fostered by the planned selection of a person who actually had a wife and child, but it introduced the element of conflict between professional and personal duties that was later discussed in the debriefing).

A second element of evaluation was based upon the written reports submitted electronically between the role play class period and the debriefing discussion. Every student had thought of additional elements pertaining to their assigned role which had not been discussed, demonstrating that reflection had in fact occurred.

Participation in the debriefing discussion during the class period following the role play was identified as the third method of evaluation. Students noted how clearly important was critical pre-planning for such an impending crisis, without this point needing to be raised or emphasized by the debriefing facilitator. Participation remained high throughout the debriefing, in part because each role was individually discussed, but also due to student curiosity as to how well they had taken into consideration the items identified by crisis preparation professionals as important to their particular role.

Finally, an essay question on the course final asked students to summarize their experience, demonstrating retention of knowledge from the exercise. The quality of the essay responses, in comparison to responses to other essay questions pertaining to more traditionally-presented material, showed a greater retention of information, a greater and more personal retention, and a favorable disposition toward the experience.

This was the only graded element of the experience, as it was believed that grades on participation during the role play might add an artificial dimension that would promote students to try to score points through interaction for that purpose alone. While this proved to be a reasonable belief for this class of graduate students, the weight of an immediate grade to foster participation may be necessary with undergraduate students who are more often provided incentive in such a manner.

## CONCLUSION

This report is more qualitative in nature, with results being analyzed in observable, non-quantitative terms. While results proved very satisfactory in this specific setting, several aspects regarding the participants undoubtedly aided in its success. All were graduate students, ostensibly functioning at a higher level of abstract conceptualization than undergraduate students. All had hotel industry experience upon which to draw (although only two had ever experienced a hurricane), and several had been managers, so the role as decision makers was not new to them. Familiarity with the students prior to the assignment of roles played an important role in its success, as in most cases students could be placed in positions to which they could draw from previous experience.

Four aspects of the role play added some distinction to that of other role plays observed previously. Each was consciously done as prescribed by the above theorists and practitioners. First, the role each participant was to play was provided to him or her during the class period prior to the actual exercise. This gave them two days to consider their roles, and such consideration was fostered by a partial listing of concerns their role would likely have as a hurricane approached. Unlike many role plays, where reactions must be developed on-the-spot, this time for reflection seemed to result in a richer, more dynamic role play.

Secondly, the inclusion of personal information served to develop the affective aspects of the experience. As we assumed might be the case, these aspects were largely ignored by all participants as the role play started, but the inclusion of the role of Secretary to frequently urge these matters to the forefront of discussion proved successful, as witnessed by the inclusion of these dynamics in the group discussion. Undoubtedly, we were unable to recreate the intensity these matters would have in a real experience, but the fact that they were seriously considered, not discounted, satisfied us that the role play had addressed affective issues in a useful and instructive way.

Third, reflection was once again fostered by requiring participants to write an understanding of their role's duties as they understood them after the group role play. This occurred between the end of the role play and the start of the following class period and served to start the reflection on a foundation of content – a foundation that is congruent with the manner of thinking of the majority of managers, according to Kolb (1984). From this foundation, participants were asked to reflect on the process of the experience; in other words, how did the process shape the outcome? Was the outcome reasonable, thorough, and congruent with the situation presented? This written presentation provided insight into individual understanding and level of reflection. It also assured that the debriefing time would be enriched by the preceding time for individual reflection.

Finally, as advised by Rausch (1999), debriefing was not rushed, in fact taking as long as the role play. The result was a debriefing period that balanced content and process issues, initiated discussion in the concrete realm most comfortable for most participants, then moved into the more abstract and process-oriented arena.

In addition to balancing content and process, debriefing progressively focused on the role and outcomes for each participant. By ending the debriefing of each individual role with a presentation of expert recommendations of the duties each manager should address in preparation for a hurricane, participants remained engaged as each individual wanted to discover how his or her role, as developed in the role play, compared to that of expert advice. The integration of this information throughout the debriefing process also allowed for its presentation in a format that was much more interactive than would have been possible in a straight lecture format.

One of the greatest strengths of this experience was that each participant had a specific role to serve, with the need for him or her to develop specific tasks for that role by the end of the exercise. Unlike many case studies, where a singular group course of action is sought, this required coordinated agreement by the group on specific individual actions. As such, no participant could be passive. Also, at the end, decisions were compared to expert advice. Unlike many role plays or case studies, where a variety of outcomes may be equally plausible, this situation provided expert demarcations of what actions were required, and the group was able to judge its performance against this standard during the debriefing. In what may appear to be a paradox, the further away the group answers were from the experts' advice, the closer one of educational objectives became – the need for advance planning in crisis management.

Due to the nature of the task and the composition of the participants, the reader is required to determine the applicability of different modalities of subject presentation. However, the experiential method of case study / role play, preceded by an opportunity for individual student reflection, and followed by another opportunity for reflection and group discussion, served to present this topic in a manner much more "real" than a coolly-analytical discourse on the expected role to be served by various resort department

managers when faced with a crisis. The engagement seemed to set the stage for much greater receptivity to the theoretically-based recommendations by experts which concluded this crisis preparation portion of the class. The involvement and active experimentation with the topic exceeded that of any other more traditionally-presented topics in the class during the course of the semester.

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## APPENDIX A ROLE PLAY ASSIGNMENT SHEETS

### GENERAL MANAGER

You are general manager of a 560 room, 5 star resort hotel, with accompanying conference center and adjacent spa, golf courses and tennis centers. Attached are photos of the property, floor plans, and a summary of the services you provide. Also in the enclosures is a summary of the current weather situation. The spa area, the floor plan of which is also included, is detached from the main building, sitting south of the main facility and parallel to the coastline. Both properties are within 100 yards of the coast at low tide.

The property recently underwent renovations – mostly cosmetic – and during that time, the parent company brought in several new leadership folks. Most have not been at the property more than 2-3 years, and most came from other parts of the country. However, all seem very competent at their jobs, and if asked can probably help raise the issues their department faces in planning for the storm.

It is 11:00 a.m. on Wednesday morning. Currently, your room occupancy is 73%, and it was to rise to 86% this evening, but it is anticipated that virtually none of those folks will show up given the current conditions. It is too soon after the news of the new hurricane threat to know how many people will elect to cut short their visits and leave, but you are aware that the front desk is getting many inquiries about weather conditions. If those scheduled to leave today do in fact leave, and no new guests arrive, your room occupancy would be approximately 52% (about 364 guests, with the average of 1.25 guests per room).

You have one of the most financially profitable trade shows of your property's year scheduled to set up this afternoon and tomorrow morning, with the trade show opening the next day. In fact, during this period of time – September/October – more of your business comes from meeting attendees than vacationers. It is expected that roughly 65% of your mid-week occupancy now are business travelers, and the remaining 35% who are tourists are predominately retirees.

It is assumed that you are usually very competent at your position and you have the respect of your staff with whom you have a good working relationship. You have been at the property only 5 months, and are appalled to find that there is no emergency plan written. You have already called a meeting of your property's leadership team. At the meeting will be the leadership for:

- Business Office
- Conference Services
- Engineering (including Grounds)
- Food and Beverage
- Front Desk
- Housekeeping
- Human Resources
- P.R./Marketing
- Security
- Technology Support

With the sudden unanticipated change of direction of Hurricane Brian, you are forced to make several decisions quickly. *You first need to identify what those decisions are, then either discuss them with your staff, or instruct them in what they are to do if you have already made your decisions.* The staff meeting is to convene in only a few minutes, and it will need to set the agenda for the next 12-14 hours prior to the expected landfall of the storm.

Additionally, yesterday you met the lead attorney from the firm that does most the outside legal work for your parent company. He is staying on property, and with the sudden change of events, you have been asked by your parent corporation to include him/her in the meeting that will be held with your directors.

You have an Assistant General Manager who can help you plan this meeting if you choose. S/he has been at the property longer than most other leadership, but does not have any hurricane experience. S/he does have experience in responding to earthquakes, since s/he lived in San Francisco prior to assuming the job at the Breakers.

In this meeting, you need an action plan for the next 12 hours - you need to reach conclusions about what needs to be done, and in what priority. A core decision is whether or not to evacuate, and if so, what level of responsibility the property would

choose to assume for its guests in such an evacuation. The property has never before evacuated. Evacuation would be required by civil authorities if the storm rose to level 3 status. At a level 2 storm, one could expect some significant flood damage throughout much of the first floor due to storm surge if precautions were not adequate and successful in protecting the property. Level one storms are all this property has ever faced, with the last one causing approximately \$400,000 damage, but that was nearly 40 years ago. Some of it was caused by storm surge and some by wind damage.

If transportation issues are discussed, you know that the property owns one 20 passenger mini-bus. Additionally, your car is company owned.

Whether the choice is made to evacuate or make preparations to weather the storm, protection of this multi-million dollar building must be done.

This will probably be the only opportunity to assemble this entire group prior to the storm, so while some details can be hammered out individually with a single director, anything requiring coordination or the assignment of limited person-power should be finalized at this meeting. The answers you get, and the input you provide, are essential for properly addressing this crisis; however, the longer you spend in this meeting, the less time you have in carrying out your urgent duties.

► **Personal situation:** You are single and have lived on property since being hired for the GM role.

## ASSISTANT GENERAL MANAGER

It is assumed that you are competent at your position and are normally able to conduct your responsibilities without detailed directions. You have worked at the property for several years and know it well. Your job is to support the General Manager as s/he coordinates preparation efforts, shielding the GM from unnecessary bothers, and thinking through situations so if s/he seems to be forgetting to consider something, you can bring it up. You are not sure the level of autonomy you should assume in this situation, and need to get indication of that from the GM. Therefore, at this meeting you need to learn of expectations on you that are beyond the norm, and to coordinate those responsibilities with others so preparations progress as efficiently as possible. You may also need to determine what items are “priority” for their completion impacts other areas. The answers you get, and the input you provide, are essential for properly addressing this crisis; however, the longer you spend in this meeting, the less time you have in a carrying out your urgent duties.

► **Specifically, you may want to know:**

- Items you can take off the GM’s plate, so s/he isn’t so swamped.
- Areas most in need of your assistance.

*These are NOT the only concerns you should have – they are offered only to start the thinking process.*

► **You may want to advocate on:**

- How does the response of the leadership team balance concerns for property, for guests, and for staff?
- Anything you see as missing from the impromptu plan.

*These are NOT the only issues you may need to express an opinion on – they are offered only to start the thinking process.*

► **ADDITIONAL NOTES:**

You have been through earthquakes before, so you have a good idea of the coordination needed after a crisis strikes, but this is the first time you have been facing a hurricane.

► **Personal situation:** You were married a year and a half ago. Your wife is 6 ½ months pregnant. It has not been an easy pregnancy. She is at home alone.

► **Additional Information also known by the General Manager:** This is a 560 room, 5 star resort hotel, with accompanying conference center and adjacent spa, golf courses and tennis centers. The main building is within 100 yards of the coast at low tide.

The property recently underwent renovations – mostly cosmetic – and during that time, the parent company brought in several new leadership folks. Most have not been at the property more than 2-3 years, and most came from other parts of the country.

It is 11:00 a.m. on Wednesday morning. Currently, your room occupancy is 73%, and it was to rise to 86% this evening, but it is anticipated that virtually none of those folks will show up given the current conditions. It is too soon after the news of the new hurricane threat to know how many people will elect to cut short their visits and leave, but you are aware that the front desk is getting many inquiries about weather conditions. If those scheduled to leave today do in fact leave, and no new guests arrive, your room occupancy would be approximately 52% (about 364 guests, with the average of 1.25 guests per room).

You have one of the most financially profitable trade shows of your property’s year scheduled to set up this afternoon and tomorrow morning, with the trade show opening the next day. In fact, during this period of time – September/October – more of your business comes from meeting attendees than vacationers. It is expected that roughly 65% of your mid-week occupancy now are business travelers, and the remaining 35% who are tourists are predominately retirees.

With the sudden unanticipated change of direction of Hurricane Brian, several decisions need to be made quickly. *You first need to identify what those decisions are.* A meeting of your leadership team is to happen in just a few minutes and it will need to set the agenda for the next 12-14 hours prior to the expected landfall of the storm. At the meeting will be the leadership for:

- Business Office
- Conference Services

- Engineering (including Grounds)
- Food and Beverage
- Front Desk
- Housekeeping
- Human Resources
- P.R./Marketing
- Security
- Technology Support

A core decision is whether or not to evacuate, and if so, what level of responsibility the property would choose to assume for its guests in such an evacuation. The property has never before evacuated. Evacuation would be required by civil authorities if the storm rose to level 3 status. At a level 2 storm, one could expect some significant flood damage throughout much of the first floor due to storm surge if precautions were not adequate and successful in protecting the property. Level one storms are all this property has ever faced.

*Please keep notes, as you will be asked at conclusion what you understand your responsibilities are.*

## SECRETARY

Of the assigned roles to play in this exercise, this is the only one which involves true “acting”. Your job is to pop in at various times and deliver messages to the assembled group. *The purpose behind this is to help convey a sense of urgency in the proceedings, to keep it from becoming solely an academic exercise.* You also help introduce the “personal” element to what could otherwise be only analytical and theoretical discussions.

The timing of your appearances is mostly up to your discretion – facilitators may cue you with a number (corresponding to the situation) if they feel the timing is good for a particular subject, but you may take the initiative and deliver one of these messages at any time that seems appropriate to you. Try to match your delivery of the message to a time where it is likely to stir most discussion and/or debate.

The messages are presented here in a suggested order, but if it appears that going out of order may achieve the goal of advancing discussion, that is fine, too. Messages should be delivered to the General Manager. Messages to be delivered:

1. “Lots” of guests are asking questions – especially about refunds or the property’s plans for their safety. Some want to know if the property is providing transportation to inland locations. A few want to stay but change rooms. A few of them seem pretty anxious and demanding.
2. You just heard from your mother that the storm has been upgraded to a level two and may grow even stronger. (If asked, your mother heard this news from her friend across town.)
3. TV Channel 6 just called back. They apparently left a message with the Marketing department, wanting to set up on property one of their remote reporting stations. They said they need to know right away, because they have equipment to route to the property, and microwave lines to test to make sure they have a good connection.
4. Workers at the spa want to close and go home – say business is dead, and they have lots of home preparations themselves to do before storm hits. Other staff say if they get to go, they want to go, too, because they have home preparations, too.
5. A guy who says he is a representative of the union that represents the spa workers just called, pretty agitated. He says he *thinks* that by their union rules, the spa workers have the right to go home. He did not leave his name or number. (only use this message if message 4 has already been delivered)
6. The wife of the Food and Beverage manager is at home with their child. She has been calling and is insistent on speaking with her husband, “right now”. Although you said you cannot interrupt, you promised you would pass along her sense that she and the child are feeling abandoned.

## **BUSINESS OFFICE**

It is assumed that you are competent at your position and are normally able to conduct your responsibilities without detailed directions. Therefore, at this meeting you need to learn of expectations on you that are beyond the norm, and to coordinate those responsibilities with others so preparations progress as efficiently as possible. You may also need to determine what items are “priority” for their completion impacts other areas. The answers you get, and the input you provide, are essential for properly addressing this crisis; however, the longer you spend in this meeting, the less time you have in a carrying out your urgent duties. You also serve as property’s risk manager in conjunction with human resources.

► **Specifically, you may want to know:**

- Policy of early checkout. (Financial policy – refunds provided?)
- Liability insurance coverage – is it worth the risk to stay open? Risk associated with evacuation?
- What plans can be made so business operation could continue if all electricity were lost for an extended period.

*These are NOT the only concerns you should have – they are offered only to start the thinking process.*

► **You may want to advocate on:**

- Safest place for record storage (business office and safe are on first floor of hotel)
- How to best position property so it can collect on any insurance claims it may need to make.
- What foreseeable dangers can be identified from a risk management perspective?
- From a financial and risk management viewpoint, what is your best advice to the general manager on what should be done?

*These are NOT the only issues you may need to express an opinion on – they are offered only to start the thinking process.*

► **ADDITIONAL NOTES:**

1. Contracted transportation may be difficult or impossible to secure at this point. Indeed, any contracted services may be hard to find on the spur of the moment. If transportation issues are raised, the property has a 20 passenger mini-bus it owns. 2. Currently, room occupancy is 73%, and it was to rise to 86% this evening, but it is anticipated that virtually none of those folks will show up given the current conditions. It is too soon after the news of the new hurricane threat to know how many people will elect to cut short their visits and leave. If those scheduled to leave today do in fact leave, and no new guests arrive, room occupancy would be approximately 52% (about 364 guests, with the average of 1.25 guests per room). 3. You have one of the most financially profitable trade shows of your property’s year scheduled to set up this afternoon and tomorrow morning, with the trade show opening the next day.

► **Personal situation:** Your fiancé lives along the intercoastal waterway in an area that may be especially hard hit. S/he has called and wants to know if s/he may stay on property for the duration of the storm.

*Please keep notes, as you will be asked at conclusion what you understand your responsibilities are.*

## CONFERENCE SERVICES

It is assumed that you are competent at your position and are normally able to conduct your responsibilities without detailed directions. Therefore, at this meeting you need to learn of expectations on you that are beyond the norm, and to coordinate those responsibilities with others so preparations progress as efficiently as possible. You may also need to determine what items are “priority” for their completion impacts other areas. The answers you get, and the input you provide, are essential for properly addressing this crisis; however, the longer you spend in this meeting, the less time you have in a carrying out your urgent duties.

► **Specifically, you may want to know:**

- What you should do with two semi trucks in your loading dock area getting ready to transfer in drayage for tomorrow’s pharmaceutical trade show – tomorrow is expected arrival date of most trade show exhibitors and buyers – one of the most regular and profitable shows for the property.
- Concierge responsibilities and expectations

*These are NOT the only concerns you should have – they are offered only to start the thinking process.*

► **You may want to advocate on:**

- Speed of decisions to be made. You have a banquet this evening for 600 scheduled.
- Engineering checking strength of roof over main ballroom area – roof is flat and often has standing water on it.

*These are NOT the only issues you may need to express an opinion on – they are offered only to start the thinking process.*

► **ADDITIONAL NOTES:**

Group scheduled to arrive in 4 days calling to ask what they should do – they want to cancel contract now as they anticipate a greatly diminished quality of experience with cleanup and repair underway. Another group has called asking for definition of “act of god” in their contract – they are to arrive in 6 days and want to know their options.

► **Personal situation:** You just moved to the area from Nevada a couple months ago. You would like to know if there is anything you should be doing with your new car to protect it? Come to think about it, what about other staff and guest cars, too?

*Please keep notes, as you will be asked at conclusion what you understand your responsibilities are.*

## ENGINEERING

It is assumed that you are competent at your position and are normally able to conduct your responsibilities without detailed directions. Therefore, at this meeting you need to learn of expectations on you that are beyond the norm, and to coordinate those responsibilities with others so preparations progress as efficiently as possible. You may also need to determine what items are “priority” for their completion impacts other areas. The answers you get, and the input you provide, are essential for properly addressing this crisis; however, the longer you spend in this meeting, the less time you have in a carrying out your urgent duties.

► **Specifically, you may want to know:**

- Priorities of property protection efforts – is priority exterior, interior, guest areas, business areas? It is expected that you will not be able to comprehensively cover all areas in limited time
- Should swimming pool be closed now (so partial draining may be done)?
- Needs from engineering that other departments have in preparation

*These are NOT the only concerns you should have – they are offered only to start the thinking process.*

► **You may want to advocate on:**

- Your perspective of what the priorities of physical preparation should be
- Safest area for guests – should you evacuate facility entirely?

*These are NOT the only issues you may need to express an opinion on – they are offered only to start the thinking process.*

► **ADDITIONAL NOTES:**

1. You have a full array of equipment available to you that you would use in normal course and scope of duties – including heavy duty equipment such as forklift, cherry-picker, chain-saw. You do not have any equipment specifically purchases for hurricanes, that a hotel would not normally have in inventory. Are there any items you need to rent for this? 2. You are also responsible for the grounds staff.

► **Personal situation:** You have two semi-invalid parents living in a beachfront highrise. You are an only child, and there is no other family in immediate vicinity. Your home is inland about 10 miles.

*Please keep notes, as you will be asked at conclusion what you understand your responsibilities are.*

## FOOD AND BEVERAGE

It is assumed that you are competent at your position and are normally able to conduct your responsibilities without detailed directions. Therefore, at this meeting you need to learn of expectations on you that are beyond the norm, and to coordinate those responsibilities with others so preparations progress as efficiently as possible. You may also need to determine what items are “priority” for their completion impacts other areas. The answers you get, and the input you provide, are essential for properly addressing this crisis; however, the longer you spend in this meeting, the less time you have in a carrying out your urgent duties.

▶ **Specifically, you may want to know:**

- Numbers expected to remain on property
- Probability of losing gas and electric – and whether a backup generator could be run during the height of the storm

*These are NOT the only concerns you should have – they are offered only to start the thinking process.*

▶ **You may want to advocate on:**

- Speed of decisions made. You are scheduled to serve a banquet of 600 tonight.
- Where to best set up to serve guests remaining on property through storm.
- Availability of any emergency equipment you feel you may need.

*These are NOT the only issues you may need to express an opinion on – they are offered only to start the thinking process.*

▶ **ADDITIONAL NOTES:** Pantries and coolers are at normal levels of stock currently. No “special provision” stock has been stockpiled.

▶ **Personal situation:** You live with a roommate, in an apartment a considerable distance from the beach. All family members are out of state.

*Please keep notes, as you will be asked at conclusion what you understand your responsibilities are.*

## FRONT DESK

It is assumed that you are competent at your position and are normally able to conduct your responsibilities without detailed directions. Therefore, at this meeting you need to learn of expectations on you that are beyond the norm, and to coordinate those responsibilities with others so preparations progress as efficiently as possible. You may also need to determine what items are “priority” for their completion impacts other areas. The answers you get, and the input you provide, are essential for properly addressing this crisis; however, the longer you spend in this meeting, the less time you have in a carrying out your urgent duties.

► **Specifically, you may want to know:**

- Policy of early checkout. (Financial policy)
- Do guests need to be relocated?
- Concierge and valet responsibilities and expectations
- How to check on guests who may have just left without checking out.

*These are NOT the only concerns you should have – they are offered only to start the thinking process.*

► **You may want to advocate on:**

- Communication with guests – you fear being swamped under from inquiries
- Need for paper backup – when should this be produced?
- Policy to respond to phone inquiries from guests’ family members – do we change the policy of not giving out information on guests?

*These are NOT the only issues you may need to express an opinion on – they are offered only to start the thinking process.*

► **ADDITIONAL NOTES:**

You remember that one guest is in a wheelchair. That makes you wonder if there are any other medical considerations.

► **Personal situation:** You just moved into a new home 3 months ago – a townhouse 2 blocks from the beach. You live alone. You figure the house needs at least 2-3 hours of preparation to be ready for the storm.

*Please keep notes, as you will be asked at conclusion what you understand your responsibilities are.*

## HOUSEKEEPING

It is assumed that you are competent at your position and are normally able to conduct your responsibilities without detailed directions. Therefore, at this meeting you need to learn of expectations on you that are beyond the norm, and to coordinate those responsibilities with others so preparations progress as efficiently as possible. You may also need to determine what items are “priority” for their completion impacts other areas. The answers you get, and the input you provide, are essential for properly addressing this crisis; however, the longer you spend in this meeting, the less time you have in a carrying out your urgent duties.

▶ **Specifically, you may want to know:**

- Numbers expected to remain on property
- What else should your staff be doing for/with rooms
- What additional duties are expected of you – your operation is pretty routine usually

*These are NOT the only concerns you should have – they are offered only to start the thinking process.*

▶ **You may want to advocate on:**

- Where to move guests if they are to be moved.
- Equipment you may feel you will need to help engineering in preparation duties.

*These are NOT the only issues you may need to express an opinion on – they are offered only to start the thinking process.*

▶ **ADDITIONAL NOTES:**

Your staff is primarily housekeepers paid minimum wage; many are one-parent heads of house. Many come to work via public transportation, then walk the last quarter mile to the property.

▶ **Personal situation:** You live with a spouse about 2 miles from the property. Your spouse does not currently work.

*Please keep notes, as you will be asked at conclusion what you understand your responsibilities are.*

## HUMAN RESOURCES

It is assumed that you are competent at your position and are normally able to conduct your responsibilities without detailed directions. Therefore, at this meeting you need to learn of expectations on you that are beyond the norm, and to coordinate those responsibilities with others so preparations progress as efficiently as possible. You may also need to determine what items are “priority” for their completion impacts other areas. The answers you get, and the input you provide, are essential for properly addressing this crisis; however, the longer you spend in this meeting, the less time you have in a carrying out your urgent duties.

You share risk management responsibilities with the business officer.

► **Specifically, you may want to know:**

- Staffing expectations – is staff being given time for preparing their own homes for the storm? If not, is it realistic to think they will show up for work?
- Who is vital and must stay on the property during the storm?
- Safest place for record storage (business office and safe are on first floor of hotel)

*These are NOT the only concerns you should have – they are offered only to start the thinking process.*

► **You may want to advocate on:**

- Most of the unions associated with the hotel workers have been pretty docile, but you don’t want to see this situation inflame issues with them.
- Safest area for guests – should you evacuate facility entirely?
- Should workers be able to bring family members to property? It raises additional liability but may assure workers stay on the job.
- There will be some risk to workers as storm approaches. What amount of risk is property ready to take?

*These are NOT the only issues you may need to express an opinion on – they are offered only to start the thinking process.*

► **ADDITIONAL NOTES:**

The group may be looking to you for an opinion on whether workers should be able to bring family members to the property for the duration of the storm. It would greatly calm their fears about family members, and help assure they stay on the job, but it also may increase the property’s liability.

► **Personal situation:** You have been living for a year with your boy/girl friend. They are off work now and ready to come to the property and lend a hand in getting things prepared. They could bring four or five friends along, too, realizing the staffing difficulties you may be facing.

*Please keep notes, as you will be asked at conclusion what you understand your responsibilities are.*

## LAWYER

You are here only by coincidence. You are the lead counsel on the law firm used by the corporation which owns the property when it needs outside legal representation. You just happened to be here on vacation. The general manager was instructed by the parent corporation to include you in the emergency management meeting. Your role is to provide advice on how to best minimize the corporation's liability and limit financial loss. You are aware that there exists no emergency management planning document to refer to.

► Specifically, you may want to advocated on:

- How to best position property so it can collect on any insurance claims it may need to make.
- What foreseeable dangers can be identified
- How to protect assets of corporation

*These are NOT the only issues you may need to express an opinion on – they are offered only to start the thinking process*

► **ADDITIONAL NOTES:** You realize the bad situation of not having an emergency plan in place, and believe that therefore you must be assertive to try to salvage what looks like a legally ugly situation developing. You believe (whether this is true or not) that since the parent corporation requested your attendance, your presence here will mean that they will expect you to do your best to assure their assets are being protected. Therefore, you must be willing to challenge anything said by the general manager that you disagree with. Remember, this is your largest client, and if they become displeased with you for any reason, you may lose their business – this is more important than having the general manager like you.

*Please keep notes, as you will be asked at conclusion what you understand your responsibilities are.*

## P.R./MARKETING/GUEST RELATIONS

It is assumed that you are competent at your position and are normally able to conduct your responsibilities without detailed directions. Therefore, at this meeting you need to learn of expectations on you that are beyond the norm, and to coordinate those responsibilities with others so preparations progress as efficiently as possible. You may also need to determine what items are “priority” for their completion impacts other areas. The answers you get, and the input you provide, are essential for properly addressing this crisis; however, the longer you spend in this meeting, the less time you have in a carrying out your urgent duties.

▶ **Specifically, you may want to know:**

- General approach property is taking in this situation so you can get it communicated
- How much information the property (G.M.) wants to release to general public and to guests (Proactively or solely responding to inquiries?)

*These are NOT the only concerns you should have – they are offered only to start the thinking process.*

▶ **You may want to advocate on:**

- Ways property can look good to media
- Keeping the “lid on” with guests, so panic doesn’t develop. This may be especially true with the guests who have families with children who are worried for their safety. There are about a dozen such families currently staying on property.

*These are NOT the only issues you may need to express an opinion on – they are offered only to start the thinking process.*

▶ **ADDITIONAL NOTES:**

You have already received three calls – one newspaper and two television stations. One television crew wants to set up and stay on property throughout the storm, using it as one of their remote broadcast areas.

▶ **Personal situation:** Your family is out of state on a trip – so far there has been no contact and you’ve been unable to reach them. The family dog, which is loved by your kids more than anything, is at home.

*Please keep notes, as you will be asked at conclusion what you understand your responsibilities are.*

## SECURITY

It is assumed that you are competent at your position and are normally able to conduct your responsibilities without detailed directions. Therefore, at this meeting you need to learn of expectations on you that are beyond the norm, and to coordinate those responsibilities with others so preparations progress as efficiently as possible. You may also need to determine what items are “priority” for their completion impacts other areas. The answers you get, and the input you provide, are essential for properly addressing this crisis; however, the longer you spend in this meeting, the less time you have in a carrying out your urgent duties.

► **Specifically, you may want to know:**

- What other areas are going to be doing, so you can assess how such efforts may assist or jeopardize security efforts (for instance, will the fire exit only doors need to be propped open for a while to allow easy access to engineering and grounds crew; will store proprietors on property be taking any special precautions to protect their stocks; will valet be moving cars to a different area or opening up valet parking area to self-parking? Etc.)
- Role your staff would be expected to serve in the event of an evacuation

*These are NOT the only concerns you should have – they are offered only to start the thinking process.*

► **You may want to advocate on:**

- Communication with guests – you fear your staff being prevented from doing their duties expediently because guests are stopping them wanting information
- Emergency equipment you may need, or support from other departments
- Ways to prevent looting if shops in hotel are damaged.

*These are NOT the only issues you may need to express an opinion on – they are offered only to start the thinking process.*

► **ADDITIONAL NOTES:**

You can expect little in the way of police or civil support immediately preceding and following the storm. Most security will need to be conducted without their help.

► **Personal situation:** You and your spouse live on the edge of the potential flood zone. Your spouse is receiving demands from his/her work to remain at work to assist in preparation for the storm. Your kids will be getting out of school in about one hour. They are seven and nine years of age.

*Please keep notes, as you will be asked at conclusion what you understand your responsibilities are.*

## TECHNOLOGICAL SUPPORT

It is assumed that you are competent at your position and are normally able to conduct your responsibilities without detailed directions. Therefore, at this meeting you need to learn of expectations on you that are beyond the norm, and to coordinate those responsibilities with others so preparations progress as efficiently as possible. You may also need to determine what items are “priority” for their completion impacts other areas. The answers you get, and the input you provide, are essential for properly addressing this crisis; however, the longer you spend in this meeting, the less time you have in a carrying out your urgent duties.

► **Specifically, you may want to know:**

- How soon can computers be moved to safer locations
- How can you use the property’s extensive technological setup to support preparation operations?
- Does marketing want information about the storm on the property’s website? Will this help communicate to others concerned about the safety of guests or will it raise anxieties?

*These are NOT the only concerns you should have – they are offered only to start the thinking process.*

► **You may want to advocate on:**

- What are the key computer support elements that are most critical, and how should they be protected.
- Closing down and moving computers to safer areas as soon as possible.
- Where is the safest place document backup to be stored

*These are NOT the only issues you may need to express an opinion on – they are offered only to start the thinking process.*

► **ADDITIONAL NOTES:**

Given the multiple demands on engineering, any computer relocation may need to be done by you unless this is made a high priority for engineering during this meeting. High priority means it will be done earlier in the process, limiting system use by other employees access to such things as food inventory, guest records, financial books, etc.

► **Personal situation:** You and your family of 5 live inland about 5 miles. Your spouse is home with the kids.

*Please keep notes, as you will be asked at conclusion what you understand your responsibilities are.*

## APPENDIX B HANDOUT OF INSTRUCTIONS

### THE SITUATION

Hurricane Brian took a surprising hook after passing over the Bahamas, and rather than heading toward the Florida Keys, suddenly is aimed directly at Palm Beach. A “warning” was just issued by the National Weather Service about 10 minutes ago. The storm is moving slowly, picking up some strength, but is not far away and expected to make landfall almost exactly where the Breakers Hotel is located in about 12-14 hours. This would be around 11:00 p.m. to 1:00 a.m. Currently, at 11:00 a.m. the weather is overcast, very humid (94%), 89 degrees, with barometer falling dramatically. The surf is calm, and there are only occasional gusts of wind. High tide should be at about 9:30 p.m.

Brian is a category 1 storm, but forecasters expect it to strengthen to at least a level 2 before landfall. I-95 serving the east coast of Florida is already crowded with tourist traffic which had been leaving the Keys. The Breakers staff is generally very competent, but there has never been an emergency plan written, so duties and expectations for this sort of situation are not clear. The Breakers withstood a level 1 storm about 4 decades ago, and has avoided all direct hits since then.

*Things you may want to know:*

### ABOUT HURRICANES

#### Hurricane Categories

Category 1	Winds 74-95 mph or storm surge 4-5 ft above normal.
Category 2	Winds 96-110 mph or storm surge 6-8 ft above normal.
Category 3	Winds 111-130 mph or storm surge 9-12 ft above normal.
Category 4	Winds between 130-155 mps or storm surge 12-18 feet above normal.
Category 5	Winds greater than 155 mph or storm surge greater than 18 ft above normal.

#### The Warning System

HURRICANE WATCH –	Possibility of immediate area being affected
HURRICANE WARNING –	Probability of immediate area being affected.
EMERGENCY PHASE -	Strike.

#### Hurricane Effects

- Wind damage - This is potentially one of the most destructive aspects of the hurricane. It can result in loss of roofs, windows, doors and vegetation.
- Collapse of buildings
- Damage by fallen trees - Disruption of electricity and telephone facilities, damage to buildings and blocking of roads.
- Flying debris - Zinc sheets, tree limbs, timber, roofing materials, fruits etc. can cause further damage to other structures.
- Rain Damage - Otherwise sturdy trees and light poles may collapse earlier than expected due to water saturation around their bases. Leaking roofs, from torrential downpour can saturate walls and destroy contents of buildings and cause the destruction of structures.
- Flood Damage - Disruption of surface communications. For example, roads, flooded or washed away; landslides; bridges destroyed; railway lines flooded or washed away; contamination of drinking water supplies.
- Storm Surge - Heavy seas, storm waves and storm surge can cause extensive damage and completely destroy structures and coastal features. The direction of approach of the hurricane and the physical form of the coastal area will influence the potential destructive force of the waves.

## ABOUT BREAKERS HOTEL

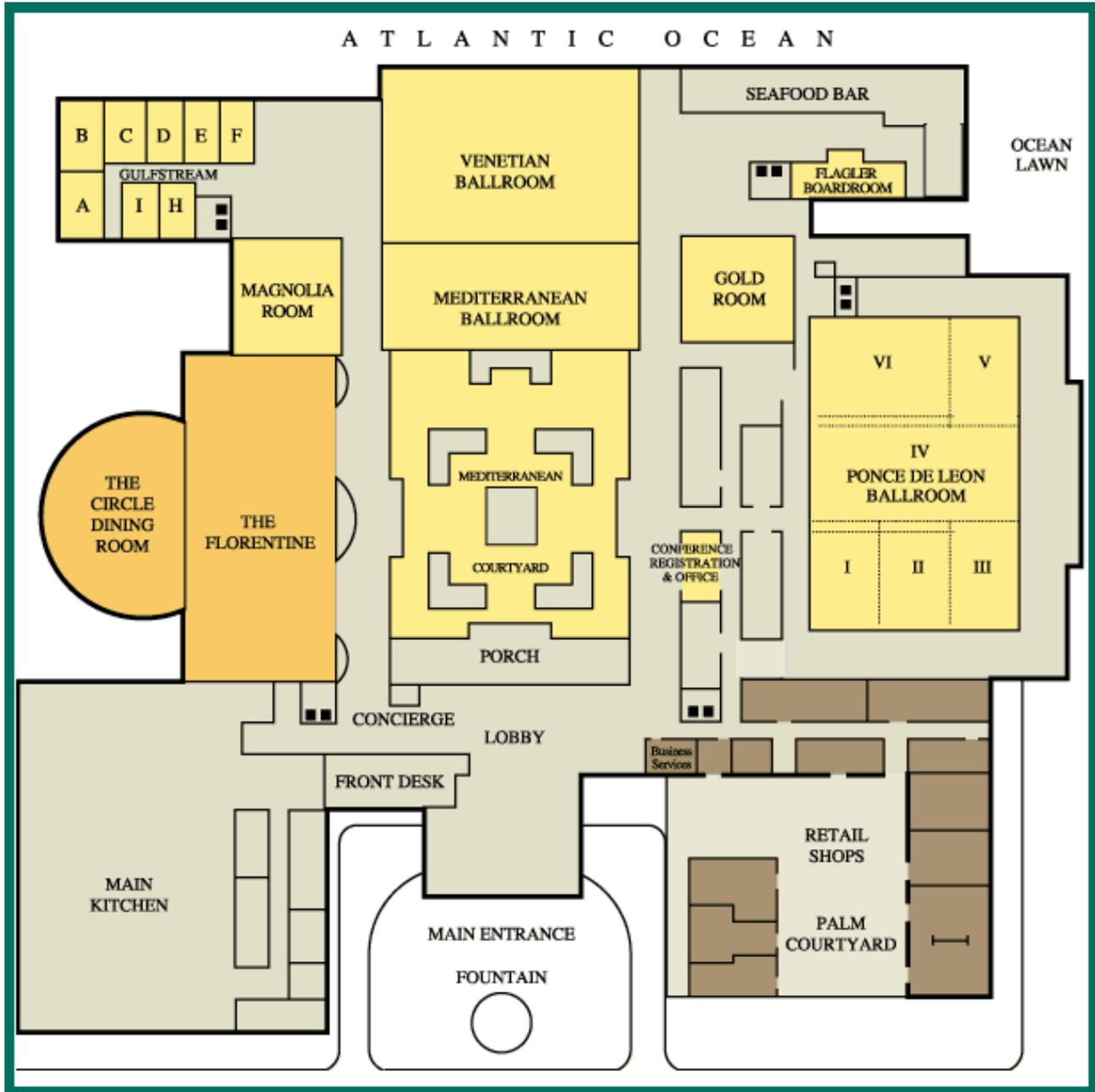
(the following is general information about the resort)

The Breakers Palm Beach is a Mobil Five-Star, AAA Five Diamond resort recognized as one of the finest in the world. The 560-room, Italian Renaissance-style hotel resides on 140 acres of oceanfront property in the heart of Palm Beach. Founded in 1896 and listed on the National Register of Historic Places, the hotel recently completed a ten-year, \$145 million revitalization and expansion effort, ushering in a new era of casual sophistication. The hotel is 10 stories high, located directly on the beach of the Atlantic Ocean. The resort features 36 holes of championship golf, 10 tennis courts, a 20,000 square foot luxury spa, a Mediterranean-style beach club overlooking one-half mile of private beach, an extensive program of family and children's activities and a variety of water sports. The Breakers also features a broad selection of restaurants, as well as an array of on-site boutiques. The Breakers is a member of The Leading Hotels of the World.

- **Climate and Suggested Dress** - Palm Beach enjoys a year-round average temperature in the low 80's. In the daytime, sportswear and casual attire are worn throughout the resort. Collared sport shirts are preferred for gentlemen. In the evening, jackets are recommended for gentlemen only in L'Escalier at the Florentine
- **Shopping** - Recognizing that shopping tops the list of preferred activities for vacationers, The Breakers has created an elegant on-property Via filled with exquisite boutiques. This collection of beautifully designed shops feature a unique selection of fine glass, clothing, jewelry, foods, wines and gifts.
- **Dining and Entertainment** - The Breakers offers 5 restaurants and 4 bars each having a unique menu and atmosphere. Enjoy classic European cuisine in L'Escalier at the Florentine Room or relax on the beach at The S.S. Reef Bar overlooking the beautiful Atlantic Ocean.
- **Child Safety** - The Breakers offers child-proofing services including: electrical outlet plugs, removal of matches, plastic trash liners, corner guards on furniture and night lights. Infant bottle warmers, bath tub rings and crib padding are also available.
- **Multi-Lingual Staff** - Members of The Breakers can fluently speak more than 25 different languages.
- **Parking** - Valet parking is available for \$17 per day.
- **Transportation** - Limousines, sedans, vans and busses are available for all of your transportation needs. For transportation reservations, please inform a sales associate when reserving your accommodation.
- **Guest Business Services** - The Guest Business Services offers personal computers, laptops, printers, copiers and facsimile machines for rental with advance notification.
- **Conference Space** - Meeting space totals 45,000 sq. ft., with the largest space the Ponce de Leon ballroom.

(Breakers Resort, 2007.)

Breakers Property layout:



(Breakers Resort, 2007.)