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# Training New Outdoor Program Managers: Recommendations Based on an Exploration of the Management Beliefs and Practices of Outdoor Program Managers

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Training New Outdoor Program Managers:  
Recommendations Based on an Exploration  
of the Management Beliefs and Practices  
of Outdoor Program Managers.

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Portland State University and the Oregon Museum of Science and Industry

Fall, 2009

## **Introduction**

In 2004 I achieved my career goal about five years ahead of schedule. I was hired as the director of a large outdoor education program. I used skills that I had developed as a program leader, and read general management books recommended to me by my supervisor, a recent public administration graduate. I led and managed a staff of 60 people who provided environmental and sustainability science education experiences in the outdoors. Eighteen months later, I hired my first new direct report in a management position, and I realized the critical role training plays in leadership and management. As I struggled to develop a training program for this new manager, I realized how little in the way of formal support for new outdoor program managers is available. Shortly thereafter, I started this comprehensive project in order to synthesize the existing literature related to leading and managing outdoor programs and to explore the beliefs and experiences of outdoor program managers. My goal was to define the training needs of new outdoor program managers and suggest a potential training program for new outdoor program managers.

Volumes are available on how to deliver everything from mountaineering training to lessons on the life cycle of a newt. However, the information available on how to lead and manage an outdoor education organization is rather limited. This project focuses on the training needs of new outdoor program managers. To define these needs, I explored the body of available literature regarding outdoor program management and conducted a survey to explore 1) how outdoor program managers conceptualize and prioritize their management practices, and 2) what active outdoor program managers believe are the training needs for new program managers. This project includes a review of outdoor

program management literature and selected general management texts that I used in my own development as a manager and in training other outdoor program managers, data from an online survey I conducted, and reflections from my own practice as the director of outdoor science education for the Oregon Museum of Science and Industry.

## **Background**

“Ever since I was a boy, I have loved being outdoors” (p. 6), are the first words of *The Natural Step Story*, Karl-Henrik Robèrt’s (2002) account of how he started one of the most widely recognized sustainability movement of our time. Dr. Robèrt is not alone, researchers and commentators note that experiences in the outdoors occupy a critical role in the human relationship with nature (Carson, 1965; Khan,1999; Louv, 2005; Nabhan & Trimble, 1994). Education programs that facilitate engaging outdoor experiences can be a critical component of education for sustainability. (Louv, 2005; Priest, 1986) In examining the history and literature it is clear to me that outdoor education co-evolved, and in many ways, overlaps with environmental education, particularly environmental education that takes place outdoors.

Outdoor education can be defined simply as “education in the outdoors” (Hammerman, Hammerman, & Hammerman, 2001). This is more a rephrasing of the term itself than a true definition and is too broad to be of significant value. However it serves to illustrate that to some, everything from ski lessons to garden based education falls under the catch-all umbrella of ‘outdoor education.’ A richer and more complex definition of outdoor education is offered by Priest (1986) as "an experiential process of learning by doing, which takes place primarily through exposure to the out-of-doors" (p.13). This definition, particularly when combined with the idea of outdoor education as

"education in, about, and for the out of doors" (Donaldson & Donaldson, 1958, p.63), provides a richness appropriate to the field and a basis for connection to larger notions of conservation and sustainability. Sustainability education necessarily involves an emotional connection to nature (Carson, 1965; Louv, 2005; Nabhan & Trimble, 1994) that experiential outdoor education programs are especially well positioned to provide (Blanchard, Ford & Strong, 2007).

For the purposes of this paper, outdoor program management is defined by the author as the leadership and supervision of groups of people that deliver programs in, about and for the outdoors. This is a deliberate narrowing of focus relative to the literature, which—as previously mentioned—focuses on delivery of outdoor programming. For the purposes of this paper, outdoor programs are held to include a variety of recreational, educational and therapeutic programming that includes several nights spent in a camp or on an expedition-like excursion. Within the literature there are a group of programs that define themselves as outdoor programs that consist primarily of day programs in the out of doors (Hammerman, Hammerman, & Hammerman 2001). The residential outdoor program providers generally describe these programs as ‘environmental education’ or simply ‘day programs’ (Ford, 1986). In this comprehensive project the survey participants include representatives from outdoor schools connected to school districts, skill-building programs such as National Outdoor Leadership School (NOLS) and Outward Bound, wilderness therapy, college outdoors programs and so on. All these programs share a common history.

## **Historical Context**

Within the history of education for sustainability, programs in, for and about the outdoors play a rich and important role. This history has provided a significant body of knowledge and a rich tradition of best practices and self examination at the program provider level. In a historical context, both education in the outdoors and "education in, about, and for the out of doors" (Donaldson & Donaldson, 1958 p. 63) diverged early from outdoor recreation. Following the development of National Parks in the United States in the late 19<sup>th</sup> Century and building on the writings of John Muir and glamorized tales of mountain men and cowboys, outdoor recreation blossomed (Ford, Blanchard & Strong, 2007). At the same time in Britain, the first in a series of connections of outdoor education to the military was initiated. In 1907, at the dawn of the 20<sup>th</sup> century, Thomas Baden Powell established organized scouting in Britain (Scout Association, 2005). With its uniforms, discipline and advancement, it was modeled on the military and designed to develop military officers from a young age. In 1910 the Boy Scouts of America was founded (Scout Association, 2005). Scouting includes skill-building exercises and experiential reflection, both hallmarks of the modern conception of outdoor education.

The next big evolution in outdoor education was also strongly influenced by military traditions. In 1944 Kurt Hahn, a refugee from Nazi Germany, founded Outward Bound in Wales. Initially Outward Bound was established to "instill spiritual tenacity and the will to survive in young British seamen being torpedoed by German U-boats" (Isaac & Goth, 1991, p. 12). After the war it was used as a workforce training program, and to this day Outward Bound UK retains a distinct character from Outward Bound USA because the majority of its participants are sent by their employers (Mann, 1997).

Outward Bound USA and its counterpart the National Outdoor Leadership School (NOLS) are internationally recognized outdoor education providers. Paul Petzhold, a mountaineer and former Outward Bound instructor, founded NOLS in 1964. It is worth noting that NOLS focuses almost exclusively on skills, while Outward Bound maintains a reflective, “character-building” experiential focus. Outward bound was even used in early Peace Corps training (Mann, 1997). The history of outdoor education is also the history of education for sustainability, these stories have come full circle.

### **Current Trends**

Like many other industries in the 21<sup>st</sup> century the outdoor program industry is changing. Authors such as Louv (2005), Nabhan (1994), and Carson (1965) have been clamoring for young people to spend more time in the outdoors. At the same time, adult participation in guided or facilitated outdoor recreation programs is declining every year (Leisure Trends Group, 2006). Yet, outdoor education is an important part of education for sustainability. The connection to nature and personal empowerment that good outdoor programs foster is a critical component of the sustainability movement. Managers in these programs are leaders in ecology, culture and learning. They set the tone and objectives of their programs, provide support and training for their staff, and insure that the programs are successful at connecting participants to nature.

The literature directly related to the management of outdoor programs is not robust and can be improved by comprehensive projects like this one. This project next explores the outdoor program management literature and the management beliefs of active outdoor program managers in order to determine the training needs of new outdoor program managers.

### **Literature Review**

The outdoor program management literature, in my experience, is limited and consists predominantly of primary source material. A handful of articles, mostly from non-peer reviewed sources, and a few books make up the existent literature regarding the administration and management of organizations that provide overnight outdoor experiences to youth and adults. In addition to the work pertaining specifically to outdoor program management, this literature review will also include some relevant works from the educational leadership and business management fields.

Overall there is almost no research-based literature related to outdoor program management. The single research article is about the hiring practices of outdoor program managers (Mannigas & Simpson, 2003). The remainder of the articles have drawn primarily on the personal experiences of the authors (Borton & Neilsen 1993; Jackson, 2007; Morris & Upchurch 2002; Nicolazzo, 2009; Teschner & Wolter, 1990; Watters 1998). The books available on the subject are primarily textbooks from recreation education programs (Blanchard, Strong & Ford, 2007; Kraus & Curtis, 1990; Edington, Hudson & Ford, 1999). The texts focus primarily on program delivery models, often include extensive facility management information, and generally do not cover staff management in depth.

Three broad themes from the literature were particularly relevant in developing survey questions related to how active outdoor program managers conceptualize and prioritize their management practices and the training needs of new outdoor program managers: 1) the characteristics of good managers and leaders, 2) the roles that leaders take on in management capacities, and 3) the functions that they perform.



### **Characteristics of Outdoor Program Managers**

The literature related to management in general, and outdoor program management in particular, often describes the characteristics of effective or successful managers (Collins, 2001; Gordon & Berry, 2006; Graham, 1997; Kouzes & Posner, 2003). Contrasted with words that describe the functions, or things managers *do*—typically verbs—or the roles, typically nouns used to describe managers, characteristics are used to describe qualities managers possess or cultivate.

In *Good to Great*, Collins (2001) focuses on what he calls level five leadership. Collins uses level five leadership to describe the leadership qualities that he found common among executives at high performing firms. The first four levels are the highly capable individual, the contributing team member, the competent manager and the effective leader. According to Collins, a level five leader possesses the characteristics personal humility and a professional ego. Gordon and Berry (2006) describe 7 essential leadership attributes in *Environmental leadership equals essential leadership*: vision, inclusion, decision, dispatch, empathy, humor and understanding. In their previous work Berry and Gordon (1993) identify ‘six insights’ about leadership in the environmental field that include the characteristics ethical behavior, life-long learner, thinking about change, breadth and flexibility as well as filling the roles of leader and follower, developing breadth and flexibility, and developing the skills to effectively use the good listener role.. Other insights from Berry and Gordon may more properly be considered roles or functions. Leadership and interpersonal skills are emphasized in leadership development programs within outdoor education (Blanchard, Ford, & Strong, 2007; Graham, 1997).

Kouzes and Posner (2003) specifically researched characteristics of effective leaders using survey methodology. Their survey respondents ranked the twenty characteristics of effective leaders from a list developed over the course of several years of research on business leaders. The top ten characteristics were: honest, forward looking, competent, inspiring, intelligent, fair-minded, broad minded, supportive, straightforward, and dependable.

The literature regarding characteristics of good managers and leaders discussed above describes a wide variety of traits and attributes. Some of these characteristics are described as innate, some as characteristics that can be developed or acquired. Many of the authors explicitly state that leadership and good management can be learned. How these characteristics are valued within the outdoor programs industry can provide a valuable basis for training new outdoor program managers.

### **Roles Outdoor Program Managers Perform**

The literature related to management in general, and outdoor program management in particular, often describe the roles of effective or successful managers. Contrasted with words that describe the functions, or things managers *do*, and the characteristics that describe qualities managers possess or cultivate, the roles are used to describe the 'hats' managers wear.

In my observation, most outdoor program management books focus on program delivery instead discussions of management. Therefore the roles and functions of managers are more prominent in the outdoor program management literature than in general management texts. For example, Kraus and Curtis (1986) list over ten roles in their discussion of effective management, including actor, catalyzer, disciplinarian,

friend, guardian, innovator model figure, spokesperson, technician, value shaper, and strategist. This list shows the variety of roles outdoor program managers perform and subsequently demonstrates the need for comprehensive training of new outdoor program managers.

In *Outdoor Leadership: Technique, Common Sense & Self-confidence* by John Graham (1997) focuses primarily on leadership in mountaineering expeditions and field leadership in general, it also includes a chapter on organizational leadership roles. Graham discusses vision, momentum and values; setting the tone; taking charge of leadership issues (pushing for leadership development, leadership quality control, and promoting leadership as a discipline); taking care of the details (meetings, paperwork etc.); and knowing when to move on. Graham notes, “leadership is not just giving directions—it’s liberating people to do what’s need[ed] in the best possible way. Good leaders don’t depend on their position to give them authority; they depend on earning trust. They don’t mandate good performance from those they lead; they inspire it” (p. 12). In this way, Graham indicates that a good manager’s role is to inspire and support staff to perform.

Perhaps even more so than characteristics, it is clear that the roles outdoor program managers undertake can be learned. Mentorship and explicit training can help to support a new outdoor program manager in prioritizing and learning these roles. Comparing the roles from the literature to the perceptions of the outdoor program management community can provide clear training guidelines for new outdoor program managers.

### **Functions of Outdoor Program Managers**

In addition to looking at characteristics and roles, the literature related to management in general, and outdoor program management in particular, often describes the functions of effective or successful managers.

For example, Bolman and Deal (2003) discuss hiring and retention, providing symbols and stories, and empowering people as specific functions that managers perform. Collins (2001) discusses providing vision, organizing people and resources, confronting brutal facts, hiring and the right people and retaining them as functions that highly effective or 'level five' managers perform. Gordon and Berry (1993) identify listening, setting an ethical example and being both a leader and a follower as functions leaders undertake.

Perhaps even more so than roles, the functions of outdoor program managers are prominent in the literature. Blanchard, Strong and Ford (2007) focus almost exclusively on program delivery and provide a good overview of management functions, including hiring, risk management, and public relations.

The functions of supervision, staff development, and sharing the organizational vision in particular occupy a very prominent role in the outdoor program management literature. Graham (1997) discusses the importance of trust in supervision and describes the outdoor program manager's supervisory role as "liberating people to do what's needed in the best possible way" (p. 12). Borton and Neilson (1993) focus on staff supervision, discussing it from the point of view of setting staff up for success, stating that staff, "need to be given the *tools* they need to do their job well" (p. 78). Borton and Neilson go on to discuss the importance of creating community within the staff team as a

an important function of the manager. Ron Watters (1998) focuses on combating burnout as a critical component of the supervision function for outdoor program managers, particularly by ensuring that staff take time off to recharge.

Further exploring the staff management supervision function, Teschner and Wolter (1990) divide supervision into two types: “directive” and “collegial” (p. 281). Directive supervision is described as “hierarchical, involving a traditional superior-subordinate relationship between a supervisor and staff member.” Collegial supervision on the other hand, involves a “supervisor and staff member [who] are engaged in a mutually supportive, dialogical relationship in which they work jointly to develop and achieve the staff member’s goals as consistent with the organizational needs.” (Teschner & Wolter, 1990, p. 281).

Also focusing on the staff supervision function, Jeff Jackson (2007) writes exclusively about the challenges and rewards of staff supervision function in the context of outdoor program management. Jackson posits that professional outdoor leaders are required to simultaneously work for someone else, do as instructed, while “following ones own ethical guidelines and doing what an individual believes to be right.” (para. 3). Jackson (2007) goes on to align formal learning (such as outdoor recreation degrees), and informal learning (such as learning to sea kayak independently) with different supervision expectations. He correlates clear boundary setting and direction as the preference of staff with stronger formal learning backgrounds. Conversely, minimal interference is the supervision strategy desired by staff with strong informal learning backgrounds. Jackson goes on to explore incidental training as a collaborative, ‘on-the-job,’ unplanned form of training, that while embedded in formal training and informal

learning, is “more importantly a vital learning tool that stands on its own once an individual is established in the workplace” (para. 5). Together these statements suggests that when an individual has learned how to do their job mostly on their own, a minimally interfering supervision strategy would be the most appropriate. This is an important insight for a new outdoor program manager, varying management technique as appropriate to the individual is clearly and important element of staff supervision. It also has implications for the supervision and development of new outdoor program managers. For example if a new outdoor program manager learns their job on their own, they would be more likely to respond positively to a supervisor who does not micro-manage.

Continuing the focus on the staff management and supervision function of outdoor program managers; Paul Nicolazzo’s (n.d) *The Components of an Effective Staff Development System* focuses primarily on professional development as a staff management tool. It begins with the very useful proposition that a professional development plan should have five major structural components:

1. principle centered leadership
2. shared mission, vision, and structural strategies at all levels
3. individual and organizational feedback loops at all levels
4. competency-based hiring and promotional standards that supports the mission, vision and structural strategies
5. an effective staff development system (para. 2)

Nicolazzo goes on to describe the components of an effective staff development system, providing guidelines for outdoor program managers on this important function. In outlining a staff development system Nicolazzo identifies three key components: ensuring full knowledge of the size and scope of their authority and responsibility, awareness of who to report to and get support from, and having the skills, knowledge and support to effectively do their jobs. Nicolazzo provides several strongly stated points

regarding documentation and clear communication in the process of hiring and supervising staff.

Teschner and Wolter (1990), Jackson (2007) and Nicolazzo (n.d.) provide a strong framework for a new outdoor program manager to develop the staff hiring training and supervision functions. Exploring the importance of these functions can provide a rationale for training new outdoor program managers in these areas.

## **Conclusions**

On the whole, the literature related to the management of outdoor programs is sparse and focuses primarily on program delivery. What little literature there is related to management of programs and staff is based on personal narratives. The general management literature offers several insights and ideas that may be useful to outdoor program managers. This gap in the literature suggests that further study of outdoor program management would strengthen the field and support improved experiences for participants, promoting more connections with nature and supporting sustainability education with the critical sense of connection and wonder. To help fill this gap in the literature I developed an internet survey to assess the attitudes and beliefs of the outdoor program management field in a systematic way that could be used to support training new outdoor program managers.

## **Methods**

### **Research Design**

The project relies on internet survey methodology. Survey methodology has been widely used in general management research (Kouzes & Posner, 2003; Collins, 2001).

Survey methodology was used in the single research-based outdoor program management article is a widely used and well-developed research tool (Dillman, 2008).

Internet surveys are a relatively recent phenomenon within the survey methodology. Web-based survey methodology builds on a rich history of mail and other written survey methods and is generally considered to be reliable and return rates are comparable or higher than more traditional survey methods (Haas & Vehovar, 2008; Sue & Ritter, 2007). Like all surveys, careful design and recruiting are critical to the success of internet based surveys (Dillman, 2008; Manfreda, Bosnjak, Berzelak, Haas & Vehovar, 2008; Sue & Ritter, 2007).

The research methodology of this project is centered around an on-line survey of outdoor program managers delivered using the SurveyMonkey web-based survey tool (see appendix A). Survey questions were developed from three research questions used as the basis of my logic model: 1) Who manages outdoor programs? 2) What is the relationship between field leadership and in-the-office leadership and management? and, 3) What are the training needs of outdoor program managers? From these research questions, 26 survey questions were developed. The questions can roughly be divided into three thematic categories: demographics, attitudes and beliefs about management, and perceived training needs. In accordance with Dillman (2008) question type varied between open ended, rating scale and multiple choice.

An expedited human subjects review was conducted in the fall of 2008 and approved by the Portland State University Human Subjects Review Committee (See appendix B). Informed consent was garnered through a two stage e-mail process. A recruiting e-mail was sent to survey candidates explaining the purpose of the survey that



included basic informed consent information. A second follow up e-mail was sent to encourage participation. Once candidates chose to click through the link to the survey, the first 'question' was a formal informed consent document. The respondents were not able to continue the survey if they did not chose "Yes, I understand these terms and consent to participate in this survey." Confidentiality was insured by not collecting any identifying information about the participants.

### **Participants**

Survey candidates were identified through the author's professional network and included colleagues of the author. Additional candidates were identified through detailed searches of various outdoor program websites and included management staff from outdoor school programs that provide residential outdoor education to school groups, outdoor behavioral health care or 'wilderness therapy' programs, and outdoor skills and leadership programs such as NOLS and Outward Bound and College Outdoors programs. Each candidate received a recruiting e-mail explaining the purpose of the survey, and the confidentiality of the responses. A follow up e-mail included a link to the web-based survey.

The survey was initially sent to 100 outdoor program managers. Thirty-four individuals responded. Not every respondent answered every question; individual questions were answered by between 19 and 23 of the participants.

Only 22 respondents answered the demographic question regarding gender; 18 of the respondents indicated that they were male (81.8%), while only four indicated that they were female (18.2%). This could be because of sample bias, however it seems to

match the my own experience of the outdoor programming industry as a male-dominated community.

Analysis of respondents' zip codes indicated that seven of them were from California and seven were from Oregon. Idaho, Mississippi, New York, Texas, Washington, Wisconsin and Wyoming were each represented by one respondent.

Respondents were between the ages of 29 and 65. The average age was 42.4, with a standard deviation of 9.5.

### **Survey**

A rating question was developed based on the leadership and management surveys conducted by Kouzes and Posner (2003) for *The Leadership Challenge*. Three sets of twenty items were identified from the outdoor program management literature review as important characteristics, roles, and functions of outdoor program managers. Characteristics included 'Creative,' 'Competitive', 'Adaptable,' and 'Ethical.' In the early part of the survey respondents were asked to rank the top seven in each category by importance. Roles included terms such as 'Information broker,' 'Coach,' and 'Friend.' Functions included options such as 'Fundraising,' 'Training,' and 'Customer Service.' The functions occupied a dominant place in the literature, this suggested a need for additional consideration. Later in the survey the functions rating question was rephrased to rate what functions take up the most time for outdoor program managers, and then rephrased again to rate what functions require the most attention during training for new outdoor program managers.

## **Data Analysis**

Survey responses were analyzed using SurveyMonkey's own quantitative analysis tools. Mean scores were calculated for ranked items. Open ended answers were not subjected to analysis but were used for qualitative support. Additional statistical analysis could be used to explore potential relationships between answers, such as the possible correlation between demographic information and management content responses to see if there are differences in management beliefs between new outdoor program managers and veteran outdoor program managers.

## **Results**

### **Demographics**

This survey was targeted to outdoor program managers. To confirm this assumption and to gather more detailed information, the first several questions related to the demographics of these positions.

In a question that asked the respondents to identify words in their job title that would indicate managerial responsibilities 16 respondents indicated that their title included the word 'director,' five answered 'coordinator,' four said 'manager,' three selected 'president,' two chose 'executive,' and one each for 'lead,' 'supervisor,' and 'administrator.' Only one respondent indicated that their title did not include a commonly used managerial indicator.

Two additional questions were asked regarding the number of staff supervised. Respondents supervised a minimum of two staff, and a maximum of 50. The mean number of staff supervised was 15.08 (sd=14.64). The total size of the programs that respondents were responsible for varied considerably as well. The programs contained a minimum of six staff and a maximum of 150. The mean program size was 50.85 staff

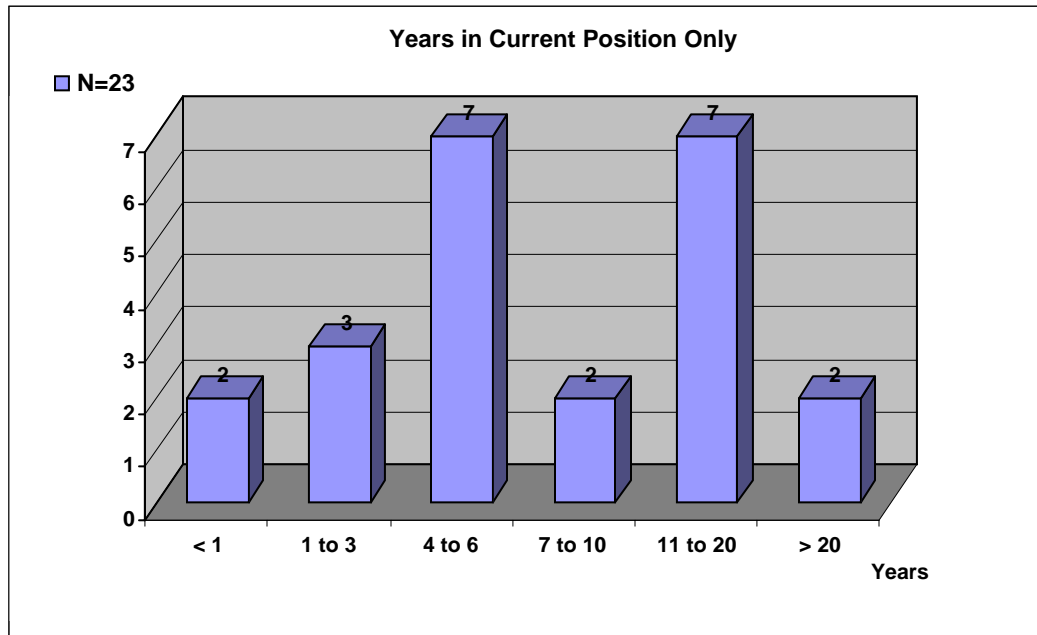
members (sd=37.84). Combined with a third question regarding the job duties of the staff supervised by the respondent, these questions confirmed that the respondents were in line with the goals of the project. Half of the managers surveyed indicated that the staff under their immediate supervision provided programming directly to participants. Survey responses indicated that a wide variety of outdoor industry segments were represented, including outdoor school, college outdoors, outdoor recreation, adventure education, environmental education, technical outdoor skills education, leadership and/or teambuilding and outdoor behavioral healthcare as shown in table 2.

Table 2  
*Industry Segment*

<b>Question: What segment of the outdoor industry does the program you are responsible for represent?</b>		
<b>Answer Options</b>	<b>Response Frequency</b>	<b>Response Count</b>
Outdoor School	31.8%	7
College Outdoors	22.7%	5
Outdoor Recreation	4.5%	1
Adventure Education	9.1%	2
Environmental Education	18.2%	4
Technical Outdoor Skills Education	4.5%	1
Leadership and/or Teambuilding	4.5%	1
Character Building	0.0%	0
Rite of Passage	0.0%	0
Traditional Skills Education	0.0%	0
Outdoor Behavioral Healthcare	4.5%	1
Other (please specify)	0.0%	0
<i>answered question</i>		<b>22</b>
<i>skipped question</i>		<b>12</b>

The managers surveyed indicated that they have a wide range of professional experience in outdoor education, with two distinct peaks around 5 years of experience and between 11 and 20 years of experience, as shown in table 3.

Table 3  
Years of experience



### Attitudes and Beliefs about Management

Several questions were asked to explore the respondents’ attitudes and beliefs about management. One question was based on statements made regarding management and leadership in various texts reviewed as part of this project. Respondents were asked to choose the phrase that they thought best described the relationship between management and leadership. Eight (38.1%) chose “Successful leadership requires good management.” Seven (33.3%) chose “All managers are leaders, some are good some are bad.” Three (14.3%) chose “Some managers are leaders.” Two (9.5%) respondents believed that leadership and management are entirely separate. One respondent thought that leadership was necessary for outcomes to exceed expectations. This indicated that most outdoor program managers felt that there was a relationship between management and leadership.

As previously described, a set of questions based on Kouzes and Posner's (2003) work was developed to explore outdoor program managers' attitudes and beliefs about management and leadership. A common question structure was used to separately explore characteristics, roles and functions of outdoor program managers. The first question of this type focused on attributes or characteristics of outdoor program managers. The respondents were asked to rank the seven most important characteristic or attribute of an outdoor program manager. A weighted rank was then calculated for each characteristic or attribute. If a characteristic or attribute was ranked most important it received seven points, if it was ranked seventh it received one point. Cumulative points were calculated based on all the rankings and given characteristic or attribute received.

The characteristics most valued by the survey respondents focused primarily on traits one could consider as indicators of 'good character.' The top five included competent or dependable; honest and ethical, adaptable or flexible, organized and intelligent, as shown in table 4. Of these, intelligent stands out as not necessarily an indicator of 'good character.'

It is interesting to note that this was the only question of this type that had categories that did not receive a ranking by any of the respondents. It is also of note that one respondent added: "Any and all of these are important; it is virtually impossible to rank these with any degree of accuracy." The same respondent also added that 'optimistic' is also of importance (Personal Communication, May, 23<sup>rd</sup>, 2009)

Kouzes and Posner's (2003) surveys indicated that internationally the top five most valuable characteristics in effective leaders were: honest, forward looking, competent, inspiring and intelligent. While not statistically analyzed for correspondence,

there appears to be good alignment between this survey and Kouzes and Posner's broader work.

Table 4  
*Most important characteristics*

<b>Question: Please rank the most important attributes or characteristics of an outdoor program manager.</b>		
<b>Answer Options</b>	<b>Weighted Rank</b>	<b>Response Count</b>
Competent or dependable	71	14
Honest and ethical	64	13
Adaptable or flexible	62	14
Organized	57	14
Intelligent	32	7
Forward thinking	29	8
Determined	26	7
Visionary	26	5
Systems thinking	24	6
Inspiring	22	7
Personal humility	19	5
Self-reflective	17	4
Life long learner	16	8
Creative	15	8
Cooperative	15	4
Imaginative	12	3
Caring listener	12	3
Charismatic	5	1
Logical	0	0
Courageous	0	0

The second question of this type consisted of twenty roles that an outdoor program manager might take on in the course of their work. Respondents were asked to rank the 7 most important roles of an outdoor program manager. A weighted rank was then calculated for each role. If a role was ranked most important it received seven points, if it was ranked seventh it received one point. Cumulative points were calculated based on all the rankings and given role received.

Three responses were received under 'other:' two focused on risk management, the other indicated "first would be solid management skills" (Personal Communication, May, 23rd, 2009).

The roles most valued by the survey respondents focused on solid personnel management skills. As shown in table 5, the top five were: teacher, coach or mentor; coordinator or organizer, leader, enabling others to act, and visionary. This may indicate a strong bias towards traditional front-line type leadership, or the same leadership skills that are valuable in leading field expeditions.

Table 5  
Most important roles

<b>Question: Please rank the 7 most important roles of an outdoor program manager.</b>		
<b>Answer Options</b>	<b>Weighted Rank</b>	<b>Response Count</b>
Teacher, coach or mentor	86	19
Coordinator or organizer	72	14
Leader	59	14
Enabling others to act	53	13
Visionary	40	7
Communicator	40	8
Rolemodel	36	10
Community Builder	34	9
Decider	22	7
Value shaper	19	4
Team member	12	8
Spokesperson	12	4
Innovator	11	4
Change agent	11	2
Communicator	11	4
Connector	6	1
Confronting brutal facts	5	2
Friend	5	2
Inspiring hope	5	1
Commitment catalyst	2	1

The third question of this type focused on functions performed by outdoor program managers. Again the respondents were asked to rank the seven most important functions of and outdoor program manager. A weighted rank was then calculated for each function. If a function was ranked most important it received seven points, if it was ranked seventh it received one point. Cumulative points were calculated based on all the



rankings and given function received. One respondent indicated that they considered coaching and training to be a part of program development and delivery.

Motivating and managing personnel, empowering people, recruiting and hiring, and coaching and training were all found within the top ten most important functions, as shown in table 6, demonstrating alignment with emphasis on staff supervision functions found in the literature. This question was later expanded upon to examine the training needs related to these same functions.

Table 6  
*Most important functions*

<b>Question: Please rank the 7 most important functions of an outdoor program manager.</b>		
<b>Answer Options</b>	<b>Weighted Rank</b>	<b>Response Count</b>
Risk management & legal issues	74	15
Planning & organizing	59	14
Motivating and managing personnel	54	11
Budgets and fiscal management	50	13
Empowering people	42	8
Strategic planning	40	9
Recruiting, hiring	39	10
Coaching and training	38	9
Program development & delivery	37	9
Customer service	24	6
Public relations and marketing	21	6
Nurturing and maintaining partnerships	19	7
Celebrating values and victories	15	5
Building trust	12	4
Conveying ethics and values	9	2
Logistics & transportation	8	4
Providing symbols, stories, vision etc.	6	2
Staff retention	4	3
Facility management	2	2

**Training and Professional Development Needs**

Survey respondents were also asked to choose whether relevant work experience or an appropriate degree were more important as part of professional preparation for outdoor program managers. Respondents were allowed to indicate that “both are equally

important.” The majority, 63.6% (14), of the respondents indicated that relevant work experience was more important, while 36.4% (8) indicated that both are equally important. No respondent indicated that an appropriate degree was more important.

Respondents were asked to rank the most top three most appropriate academic trainings for an outdoor management position like their own from a list of degree types. A weighted rank was calculated based on the number of responses received in most appropriate, second and third.

An education degree was considered the most appropriate. This may be related to results from a previously discussed question that in which most respondents identified their program as an outdoor school, college outdoors or environmental education. Graduate degrees in Recreation and Business Administration were nearly tied for the second most relevant academic preparation. One respondent wondered why a Psychology degree was not included in the list of relevant degrees. One commented that they did not think it really mattered. One listed a Master’s in Adventure Education. A fourth comment indicated that if a Recreation and Leisure Studies degree were intended as preparation for outdoor program management, it would need to have a strong focus on outdoor programs (Personal Communication, May, 19th, 2009).

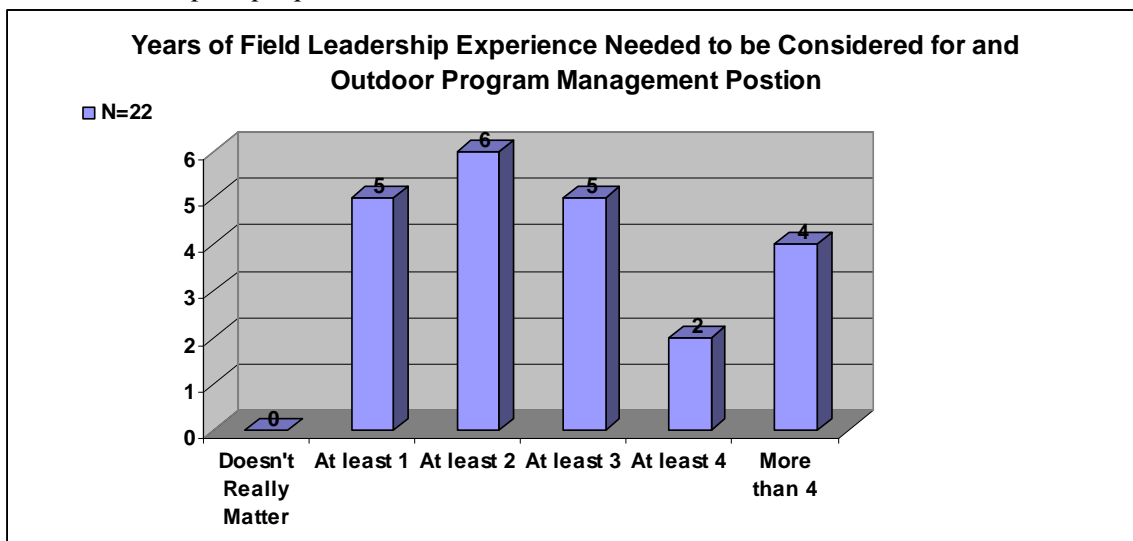
Respondents were also asked to rank the best professional experience to prepare an individual for an outdoor program management position. Weighted ranks were also calculated. Field leadership, such as guiding outdoor trips was rated by participants to be the most important, followed by front-line management. Middle management experience was a distant third. Field experience was considered more important than executive

management experience, although executive experience was ranked most important by one respondent.

The survey asked how important it is that outdoor program managers have field leadership experience. A strong majority, 81.8% (18), indicated that it was very important and the remaining 18.2% (4) indicated it was important. No respondents ranked it somewhat important or not important. This clearly indicated the significant importance placed by the outdoor program management field on front-line leadership of outdoor programs.

The number of years of field leadership experience that an individual should have before being considered for program management position was also explored in this survey. There is no clear consensus regarding how many years are needed in the field prior to become an outdoor program manager. Clearly all respondents felt that at least one year of field leadership experience is needed, however half (11) believe that three or more years is necessary as demonstrated in table 7.

Table 7  
*Field leadership as preparation*



The question regarding the most important functions of outdoor program managers was rephrased to explore the training needs related to these activities. Respondents were asked rank the same 20 functions from the previous question for importance as training topics for new outdoor program managers. Similarly the respondents were also asked to rank these same functions according to how much of their time was spent doing them.

The top ten training topics, most important functions, and functions that occupy the most time for managers had some concurrence, as shown in table 8. Each top ten included risk management and legal issues; planning and organizing; motivating and managing personnel; budgets and fiscal management; strategic planning; recruiting and hiring; coaching and training and program development and delivery.

Table 8  
*Comparison between most important functions, most time spent performing functions and most important training topics.*

Most Important	Most Time	Training Topics	Functions
1	2	1	Risk management & legal issues
2	1	4	Planning & organizing
3	4	2	Motivating and managing personnel
4	5	3	Budgets and fiscal management
5	20	6	Empowering people
6	12	10	Strategic planning
7	9	8	Recruiting, hiring
8	10	7	Coaching and training
9	8	5	Program development & delivery
10	6	15	Customer service
11	3	5	Public relations and marketing
17	7	19	Logistics & transportation

Perhaps more interestingly, empowering people was missing from the most time question but found in both most important functions and most important training topics. Similarly customer service was not found in the top ten training topics, but was present in

the top ten important functions and time spent categories. Policy creation and enforcement was missing from the most important function question due to a survey creation error. Strategic planning was found only in the most important functions top ten. Logistics and transportation was only found in the top ten of the top ten most time spent category. Public relations and marketing was considered eighth most important training topic, but did not appear in the top ten of either of the other categories.

Risk management and legal issues; planning and organizing; budgets and fiscal management; and motivating and managing personnel were found in the top five weighted rankings for all three questions. Clearly these four topics are considered important and are worth focusing on in the training of new outdoor program managers.

An additional question asked the participants to rank the various forms of training they had received in their outdoor program management career by their value. Participants were asked to rate all the training types that applied to them and rank them 'very relevant,' 'mostly relevant,' 'somewhat relevant' and 'not relevant.' A weighted rank was assigned to each type of training. 'Very relevant' responses generated four points for the training type, 'mostly relevant' three points, 'somewhat relevant' two, and 'not relevant' one point.

On the job learning was clearly considered the most relevant type of training. Training by one's predecessor received the most 'not relevant' rankings (9) followed by a degree specific to the position (4), as seen in table 9. In reviewing the survey and responses it is possible that the lack of a 'not applicable' category may have confused some respondents who may have intended to indicate that they had not received that type of training and chose not 'not relevant' instead. One person commented that professional

conferences should have been included on this list. (Personal Communication, May, 19th, 2009)

Table 9  
*Value of various forms of training*

<b>Question: Please indicate the value of the different kinds of training you have received. (Pick all that apply)</b>		
<b>Answer Options</b>	<b>Response Count</b>	<b>Weighted Rank</b>
I learned on the job.	22	84
Mostly on my own	19	60
Some mentoring	20	57
I got a degree specific to this kind of job	19	53
I read some books	21	50
In-house, formal training	19	50
My predecessor trained me	21	47
I took some courses outside of work	17	46
<i>answered question</i>		22
<i>skipped question</i>		12

The respondents were also asked to indicate if they had read and found useful a variety of texts found and used by the author for this survey and in my own professional development. In general there was not a great deal of response to any of the texts as being particularly useful. Jim Collins’ (2001) *Good to Great* was the only book to receive more than three ‘useful to me’ selections, and only eight of the 22 people who responded to the question chose it.

A follow up question asked what leadership and management books not found on the list had been useful and relevant to the respondents’ work. No common text or set of texts was suggested by multiple respondents. Many program delivery or field leadership books, such as the *NOLS Leadership Educator Notebook* and *Effective Leadership of Outdoor Programming* were mentioned. One respondent listed several non-fiction outdoor adventure texts such as *Touching the Void*, *Undaunted Courage* and *The Dove*. Other books included popular general management books such as *The Seven Habits of*

*Highly Effective People* and *First Break All the Rules* (Personal Communication, May, 19th, 2009).

A final open ended question asked the respondents to share any additional thoughts they had about outdoor program management. Ten of the respondents answered the question. Five of them indicated that they felt that there was an important balance between field program experience and management training required for an outdoor program manager to be successful. One respondent commented the “Formal management training and management experience are greatly undervalued in this field” (Personal Communication, May, 19th, 2009).

### **Conclusions**

The field of leadership for sustainability education strengthens the critical human connection to nature by providing experiences in the outdoors and will benefit from trained and experienced program managers. The results of this survey indicate that currently working outdoor program managers believe that new managers are best prepared if they directly facilitated outdoor education experiences for at least one year and have studied management techniques and practices in some way.

Within a field that prides itself on training and professional development at the programmatic level, formal training and skill building are lacking at the management level. In addition, results from this project indicate that formal education and training at the management level are undervalued, or not considered valuable. This suggests that formal programs available may not meet the needs of the field.

Key findings from this project include the concordance between four of the top five most important training topics for new outdoor program managers, most important

functions and most time consuming functions. This allows for clear focus within the outdoor education field when hiring, promoting and training new outdoor program managers. By focusing on 1) risk management; 2) motivating and managing personnel; 3) budgets and fiscal management; and 4) planning and organizing, a sort of triage can be performed within the field and in training new managers.

The Wilderness Risk Management Conference, for example, provides strong support for what was found to be the most important function and training topic for outdoor program managers: risk management. Support specific to the other three areas—motivating and managing personnel, budgets and fiscal management, and planning and organizing—is not as readily apparent. In my own work, when hiring a new outdoor program manager or in the course of supervision of managers that already work for me, I can look to their skill sets, focus on these four areas and find opportunities for training and growth.

In my own work, I can provide formal training for new staff that includes an emphasis on risk management, motivating and managing personnel, budgets and fiscal management, and planning and organizing. The Wilderness Risk Management Conference can provide a pivotal role in the training program regarding risk management and safety issues. In addition, this is an area that outdoor education texts cover relatively well.

Risk management and legal issues were clearly considered both the most important function and the highest training need. The Wilderness Risk Management Conference (WRMC) is the only outdoor industry conference that attracts all members of the outdoor program industry. Risk management within outdoor programming is a



complex and detailed field that includes everything from course planning to media and next-of-kin communication. I attended the WRMC and found it very valuable.

As noted previously, planning and organizing, particularly with an eye towards risk management at the field level are covered adequately in the existent outdoor program literature. The available literature and operational practices of established outdoor programs can be used to provide a robust and detailed program planning and organization training program for new outdoor program managers.

Motivating and managing personnel and budget and fiscal management are not covered as well in the outdoor program literature. Several general management books and mentoring have both been useful to me in learning how to manage and motivate personnel. Ongoing, in-house professional development that includes reading groups and case studies from actual supervision incidents could be applied readily. Human resources professional groups also provide ongoing formal management and supervision training.

Budget and fiscal management training can be supported both formally and in-house similarly to motivating and managing personnel. In both of these cases there is a great deal that is unique about how outdoor programs work, what motivates the staff, and how the revenue streams and expenses flow and are managed that must be learned on the job and can best be supported by in-house, formal training developed around industry best practices and organizational policy.

### **Attitudes and Beliefs about Management**

It was clear that the survey respondents saw a connection between leadership and management. No respondent felt that managers are never leaders, and only two felt leadership and management were entirely separate concepts. These responses mesh well

with the belief that field leadership experience is very important as preparation for outdoor program management work. Competent leadership in one context may translate to leadership in another. One respondent noted that “the only common elements [in good program managers] are extensive field leadership experience and an in-depth, long term familiarity with the environment in which the field course take place” (Personal Communication, May, 19th, 2009). Another noted that “when decisions come from an understanding of management theory AND a deep knowledge of the technical area you are managing, the likelihood of making better decisions is increased” (Personal Communication, May, 19th, 2009). Leadership at the management level is a critical component of supporting the outdoor program industry as it shifts demographically towards youth and the connections to education for sustainability become more and more explicit.

### **Training Needs of Outdoor Program Manager**

On the job learning was considered the most valuable training that the survey respondents received, followed by ‘mostly on my own.’ Clearly, formal training available is not considered valuable where it is available. One respondent commented, “I know of several [managers] who completely downplay the role of academic preparation, often because they don’t have it” (Personal Communication, May, 19th, 2009). Another noted that “formal management training and experience are not valued in this field” (Personal Communication, May, 19th, 2009). Both of these statements are backed up by the focus on more front-line management roles and characteristics found in the survey results, as opposed to the emphasis in vision and strategic planning found in much of the general management literature.

There was no consensus whatsoever on useful texts for outdoor program managers. In my own experience, there is no single work that filters management theory and practice through the outdoor program management lens. *Leadership and Administration of Outdoor Pursuits* (Blanchard, Strong & Ford, 2007) and *Adventure Education* (Priest, 1999) both come close but focus primarily on leadership at the technical and programmatic level. A broad bibliography could be prepared drawing from both general management and outdoor program management and leadership sources. Considerable time and effort would be required by the new manager to discern what is useful in each individual text. This could be mitigated by annotating the bibliography.

### **Opportunities for Further Research**

This project could be expanded to include in-depth statistical analysis of the responses to look for interesting and informative correlations. Interviews could be conducted to expand the richness of the responses. A book could be written synthesizing the results and the literature with the experiences of the author or authors. There are several, more specialized areas that could be explored further. For example, by their very nature, outdoor programs require supervision over distance. The literature regarding supervision over distance is relatively brief and focuses on the technology available to modern managers. Videoconferencing, instant messaging, email and even conference calling are not readily available, if at all, in the outdoor program setting. Insights from outdoor program managers and the literature that focuses on staff supervision in outdoor programs could be synthesized with the general management books that focus on management over distance.

Outdoor program managers play a critical leadership role in the sustainability education movement. They create, manage and support programs that can inspire concrete and emotional connections to the natural environment through experiential learning in the out-of-doors. Leadership at this level can significantly enhance the effectiveness of these experiences, and is especially critical in large programs. Well trained outdoor program managers can better support education for sustainability. This comprehensive project has explored the literature related to outdoor program management, performed and analyzed a survey of outdoor program managers and developed suggestions for training new outdoor program managers. I will use the results of this project to improve my own work, train new outdoor program managers and hopefully influence the field in a systematic way to improve.

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## 1. Intro and Informed Consent

\* 1. You have been invited to participate in a research study conducted by me, Travis Southworth-Neumeyer from Portland State University, Graduate School of Education. I am also the Director of Outdoor Science Education at OMSI, the Oregon Museum of Science and Industry. I hope to learn more about how we all manage staff in outdoor program settings. In addition to my professional interest, this study is being conducted in partial fulfillment of the requirements for a master's degree under the supervision of Dr. Rosalyn McKeown, Program Coordinator for the Leadership, Ecology Culture and Learning program at Portland State University.

If you decide to continue to participate you take a web based survey on management of outdoor programs that should only take about 20 minutes. At the end of the survey you will be asked if you are willing to participate in a follow up interview. While participating in this study it may be possible that you might be asked some questions that pertain to proprietary information about your organization or employer, you may elect to not answer any questions that you are not comfortable answering. You may not receive any direct benefit from participation in this study, however, the study may help to increase knowledge which may help other in the future. Information from this study will be publicly available in the form of a Master's Thesis and hopefully in other forms as well, and our field and perhaps even you, may benefit.

Any information that is obtained in connection with this study that can be linked to you or identify you in any way will be kept confidential. Your e-mails will be kept separate from your survey responses. The interview will be recorded and transcribed, during transcription your name will be coded to a pseudonym, assigned alphabetically based on the date of the interview. This pseudonym will be used in all subsequent analysis and dissemination. Any mention of your employer during the interview will be changed in transcription to a generic form such as "employer" or "organization." This language will also be used in all subsequent analysis and dissemination. All data and records will be stored digitally for a period of at least seven years.

Participation is entirely voluntary. Your decision to participate or not will not affect your relationship with the research or with Portland State University or OMSI in any way. If you decide to take part in the study, you may chose to withdraw at any time without any penalty. Please keep a copy of this e-mail for your records.

If you have any concerns or problems about your participation in this study or your rights as a research subject, please contact the Human Subjects Review Committee, Office of Research and Sponsored Projects, 600 Unitus Bldg., Portland State University, (503) 725-4288 / 1-877-480-4400. If you have questions about the



## Appendix A: On-line survey with consent form

study itself, contact Travis Southworth-Neumeyer at [tneumeyer@omsi.edu](mailto:tneumeyer@omsi.edu) or (503) 539-6763

Click on the link below to indicate that you have read and understand the above information and agree to take part in this study to continue on with the survey. Please understand that you may withdraw your consent at anytime without penalty, and that, by clicking on the link below, you are not waiving any legal claims, rights or remedies. Print this screen as a copy for your own records.

Yes, I understand these terms and consent to participate in this survey.

No, I do not agree or understand and will not participate in this survey.

## 2. First Survey Page

1. Please choose the phrase that you think best describes the relationship between management and leadership.

- All managers are leaders, some are good leaders, some are bad.
- Successful leadership requires good management.
- Leadership and management are entirely separate concepts.
- Leadership and management are the same thing.
- Managers are never leaders.
- Leadership is necessary for outcomes that exceed expectations; management will only meet expectations.
- Some managers are leaders.

2. About how many staff members do directly supervise?

3. What do the staff members you supervise spend most of their time doing?

- Directly providing programming
- Logistics and planning
- Supervising other staff members
- Managing programming

Other (please specify)

4. About how many staff members are involved in the programs you are responsible for and/or provide support for?

3. Second Survey Page

1. Please rank the 7 most important roles of an outdoor program manager.

	Most Important	Second	Third	Fourth	Fifth	Sixth	Seventh
Rolemodel	jñ	jñ	jñ	jñ	jñ	jñ	jñ
Teacher, coach or mentor	jñ	jñ	jñ	jñ	jñ	jñ	jñ
Enabling others to act	jñ	jñ	jñ	jñ	jñ	jñ	jñ
Communicator	jñ	jñ	jñ	jñ	jñ	jñ	jñ
Commitment catalyst	jñ	jñ	jñ	jñ	jñ	jñ	jñ
Value shaper	jñ	jñ	jñ	jñ	jñ	jñ	jñ
Friend	jñ	jñ	jñ	jñ	jñ	jñ	jñ
Spokesperson	jñ	jñ	jñ	jñ	jñ	jñ	jñ
Inspiring hope	jñ	jñ	jñ	jñ	jñ	jñ	jñ
Coordinator or organizer	jñ	jñ	jñ	jñ	jñ	jñ	jñ
Community Builder	jñ	jñ	jñ	jñ	jñ	jñ	jñ
Team member	jñ	jñ	jñ	jñ	jñ	jñ	jñ
Innovator	jñ	jñ	jñ	jñ	jñ	jñ	jñ
Visionary	jñ	jñ	jñ	jñ	jñ	jñ	jñ
Change agent	jñ	jñ	jñ	jñ	jñ	jñ	jñ
Confronting brutal facts	jñ	jñ	jñ	jñ	jñ	jñ	jñ
Leader	jñ	jñ	jñ	jñ	jñ	jñ	jñ
Connector	jñ	jñ	jñ	jñ	jñ	jñ	jñ
Communicator	jñ	jñ	jñ	jñ	jñ	jñ	jñ
Decider	jñ	jñ	jñ	jñ	jñ	jñ	jñ

Other (please specify)

4. Third Survey Page

1. Please rank the 7 most important functions of an outdoor program manager.

	Most Important	Second	Third	Fourth	Fifth	Sixth	Seventh
Building trust	10	10	10	10	10	10	10
Staff retention	10	10	10	10	10	10	10
Customer service	10	10	10	10	10	10	10
Program development & delivery	10	10	10	10	10	10	10
Facility management	10	10	10	10	10	10	10
Strategic planning	10	10	10	10	10	10	10
Logistics & transportation	10	10	10	10	10	10	10
Providing symbols, stories, vision etc.	10	10	10	10	10	10	10
Nurturing and maintaining partnerships	10	10	10	10	10	10	10
Empowering people	10	10	10	10	10	10	10
Coaching and training	10	10	10	10	10	10	10
Recruiting, hiring	10	10	10	10	10	10	10
Celebrating values and victories	10	10	10	10	10	10	10
Planning & organizing	10	10	10	10	10	10	10
Public relations and marketing	10	10	10	10	10	10	10
Budgets and fiscal management	10	10	10	10	10	10	10
Motivating and managing personnel	10	10	10	10	10	10	10
Risk management & legal issues	10	10	10	10	10	10	10
Conveying ethics and values	10	10	10	10	10	10	10

Other (please specify)

## 5. Fourth Survey page

1. Please rank the most important attributes or characteristics of an outdoor program manager.

	Most important	Second	Third	Fourth	Fifth	Sixth	Seventh
Organized	10	10	10	10	10	10	10
Life long learner	10	10	10	10	10	10	10
Intelligent	10	10	10	10	10	10	10
Charismatic	10	10	10	10	10	10	10
Courageous	10	10	10	10	10	10	10
Cooperative	10	10	10	10	10	10	10
Caring listener	10	10	10	10	10	10	10
Forward thinking	10	10	10	10	10	10	10
Personal humility	10	10	10	10	10	10	10
Inspiring	10	10	10	10	10	10	10
Honest and ethical	10	10	10	10	10	10	10
Self-reflective	10	10	10	10	10	10	10
Logical	10	10	10	10	10	10	10
Adaptable or flexible	10	10	10	10	10	10	10
Creative	10	10	10	10	10	10	10
Competent or dependable	10	10	10	10	10	10	10
Visionary	10	10	10	10	10	10	10
Imaginative	10	10	10	10	10	10	10
Determined	10	10	10	10	10	10	10
Systems thinking	10	10	10	10	10	10	10

Other (please specify)

## 6. Fifth Survey page

1. About how long have you held your current position?

Less than 1 year

1 to 3 Years

4 to 6 years

7 to 10 years

11 to 20 years

More than 20 years

2. How long have you held similar positions (including your current position) ?

Less than 1 year

1 to 3 years

4 to 6 years

7 to 10 years

11 to 20 years

More than 20 years

3. Which of the following words are included in your job title?

Superintendent

Executive

Supervisor

Administrator

Lead

None of these words

Manager

Coordinator

Director

President

Other

7. Sixth Survey page (halfway there)

1. Please indicate the 7 activities that take up the most of your time as an outdoor program manager.

	The Most Time	Second	Third	Fourth	Fifth	Sixth	Seventh
Budgets and fiscal management	jn	jn	jn	jn	jn	jn	jn
Conveying ethics and values	jn	jn	jn	jn	jn	jn	jn
Strategic planning	jn	jn	jn	jn	jn	jn	jn
Building trust	jn	jn	jn	jn	jn	jn	jn
Planning & organizing	jn	jn	jn	jn	jn	jn	jn
Program development & delivery	jn	jn	jn	jn	jn	jn	jn
Staff retention	jn	jn	jn	jn	jn	jn	jn
Coaching and training	jn	jn	jn	jn	jn	jn	jn
Customer service	jn	jn	jn	jn	jn	jn	jn
Motivating and managing personnel	jn	jn	jn	jn	jn	jn	jn
Policy creation and enforcement	jn	jn	jn	jn	jn	jn	jn
Nurturing and maintaining partnerships	jn	jn	jn	jn	jn	jn	jn
Logistics & transportation	jn	jn	jn	jn	jn	jn	jn
Risk management & legal issues	jn	jn	jn	jn	jn	jn	jn
Facility management	jn	jn	jn	jn	jn	jn	jn
Providing symbols, stories, vision etc.	jn	jn	jn	jn	jn	jn	jn
Recruiting, hiring	jn	jn	jn	jn	jn	jn	jn
Celebrating values and victories	jn	jn	jn	jn	jn	jn	jn
Empowering people	jn	jn	jn	jn	jn	jn	jn
Public relations and marketing	jn	jn	jn	jn	jn	jn	jn

Other (please specify)

8. Seventh Survey Page

1. How important is it that outdoor program managers have field leadership experience (trip leaders, guides, instructors, etc.) ?

- Very Important
- Important
- Somewhat Important
- Not Important

2. How many years of trip or program leadership should an individual have before being considered for a program management position?

- Field Experience Doesn't Really Matter
- At least 1
- At least 2
- At least 3
- At least 4
- More than 4

3. Please indicate the value of the different kinds of training you have received. (Pick all that apply)

	Very relevant	Mostly relevant	Somewhat relevant	Not relevant
I read some books	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I got a degree specific to this kind of job	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mostly on my own	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My predecessor trained me	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
In-house, formal training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I took some courses outside of work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I learned on the job.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Some mentoring	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify)	<input type="text"/>			



9. Eighth Survey page

1. Please indicate what you think the 7 most important training topics for a new outdoor program manager are.

	The Most Important	Second	Third	Fourth	Fifth	Sixth	Seventh
Coaching and training	jn	jn	jn	jn	jn	jn	jn
Nurturing and maintaining partnerships	jn	jn	jn	jn	jn	jn	jn
Staff retention	jn	jn	jn	jn	jn	jn	jn
Logistics & transportation	jn	jn	jn	jn	jn	jn	jn
Customer service	jn	jn	jn	jn	jn	jn	jn
Motivating and managing personnel	jn	jn	jn	jn	jn	jn	jn
Providing symbols, stories, vision etc.	jn	jn	jn	jn	jn	jn	jn
Risk management & legal issues	jn	jn	jn	jn	jn	jn	jn
Empowering people	jn	jn	jn	jn	jn	jn	jn
Planning & organizing	jn	jn	jn	jn	jn	jn	jn
Building trust	jn	jn	jn	jn	jn	jn	jn
Program development & delivery	jn	jn	jn	jn	jn	jn	jn
Facility management	jn	jn	jn	jn	jn	jn	jn
Celebrating values and victories	jn	jn	jn	jn	jn	jn	jn
Recruiting, hiring	jn	jn	jn	jn	jn	jn	jn
Budgets and fiscal management	jn	jn	jn	jn	jn	jn	jn
Policy creation and enforcement	jn	jn	jn	jn	jn	jn	jn
Public relations and marketing	jn	jn	jn	jn	jn	jn	jn
Conveying ethics and values	jn	jn	jn	jn	jn	jn	jn
Strategic planning	jn	jn	jn	jn	jn	jn	jn

Other (please specify)

10. Ninth Survey page

1. Please indicate the value of the following books to you as an outdoor program manager.

	Never heard of it	Heard of it, but have not read it	Not useful to me	Somewhat useful to me	Useful to me	Very useful to me
Coaching for Improved Work Performace, by Ferdinand Fournies	j0	j0	j0	j0	j0	j0
Leadership and Administration of Outdoor Pursuits by Ford and Blanchard	j0	j0	j0	j0	j0	j0
Good to Great, by Jim Collins	j0	j0	j0	j0	j0	j0
The Leadership Challenge, by Kouzes and Posner	j0	j0	j0	j0	j0	j0
Environmental Leadership Equals Essential Leadership, by Gordon and Berry	j0	j0	j0	j0	j0	j0
Basic Camp Management, by Ball and Ball	j0	j0	j0	j0	j0	j0
Environmental Leadership: Developing Effective Skills and Styles, edited by Berry and Gordon	j0	j0	j0	j0	j0	j0
Creative Management in Recreation, Parks, and Leisure Services, by Kraus and Curtis	j0	j0	j0	j0	j0	j0
Leadership and Sustainability, by Michael Fullan	j0	j0	j0	j0	j0	j0
Management of Park and Recreation Agencies, by Van der Smisson et. al.	j0	j0	j0	j0	j0	j0

2. Please list any other management or leadership books that you have found useful and relevant to your work.

## 11. Tenth Survey page

1. What do you consider the most appropriate academic training for an outdoor program management position like yours? (Pick the top 3)

	Most Appropriate	Second	Third
Recreation/Leisure Studies Undergraduate (BA/BS) Degree	jn	jn	jn
Masters in Business Administration (MBA)	jn	jn	jn
Masters in Public Administration (MPA)	jn	jn	jn
Recreation/Leisure Studies Graduate Degree (MA/MS)	jn	jn	jn
Education Degree	jn	jn	jn
Undergraduate Business Degree	jn	jn	jn
Life or Environmental Science Degree	jn	jn	jn

Other (please specify)

2. What do you consider the best professional experience to prepare an individual for an outdoor program management position like yours? (Pick the top 3)

	Most Appropriate	Second	Third
Field Leadership (Guide, Instructor, Trip Leader etc.)	jn	jn	jn
Field Experience (Expedition Member, Trip Staff etc.)	jn	jn	jn
Front-line Management Experience	jn	jn	jn
Middle Management Experience	jn	jn	jn
Executive Management Experience	jn	jn	jn

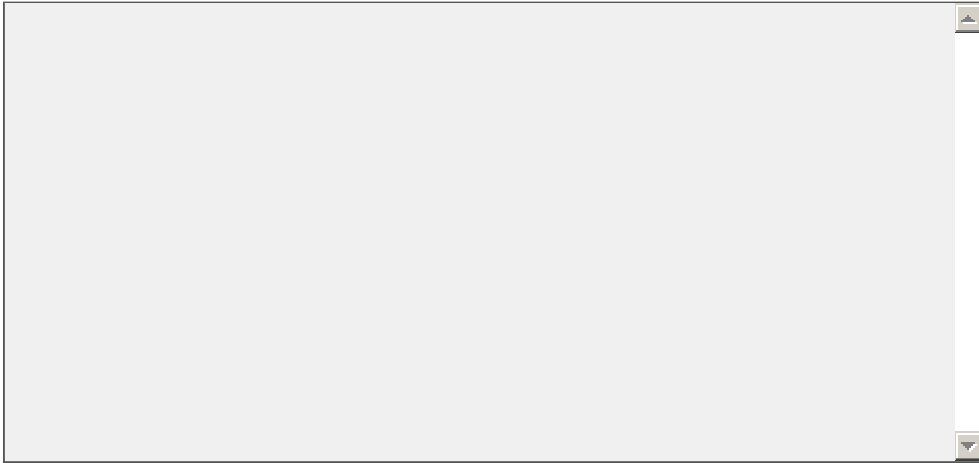
Other (please specify)

## 12. Eleventh Survey page

1. Which do you think is a more important part of the preparation for an outdoor program manager?

- An appropriate degree
- Relevant work experience
- Both are equally important

2. Please share any additional thoughts you have about outdoor program management in the space below.



## 13. Twelfth Survey page (almost done)

1. What is your date of birth?

MM DD YYYY  
MM/DD/YYYY  /  /

2. What is your zip or postal code?

3. What is your gender?

Female

Male

Other

4. What segment of the outdoor industry does the program you are responsible for represent?

5. What degrees have you received? (Please check all that apply)

- High School Diploma
- GED
- Bachelor of Science (MS or MSc)
- Bachelor of Arts (BA)
- Masters of Science (MS)
- Masters of Arts (MA)
- Masters of Public Health (MPH)
- Masters of Business Administration (MBA)
- Masters of Public Administration (MPA)
- Masters of Education (M.Ed)
- Masters of Social Work (MSW)
- Masters of Fine Arts (MFA)
- Juris Doctorate (J.D.)
- Doctorate of Philosophy (PhD or D.Phil)
- Medical Doctor (M.D)
- Education Doctorate (Ed.D)
- Psychology Doctorate (PsyD)

Other (please specify)

## 14. Last Page

1. Thanks for taking the time to fill out the survey! I'm certain your responses will help to define the outdoor program management landscape for all of us.

I'd like to conduct follow up interviews with representatives of various segments of the outdoor program interview if you would be interested in talking with me for an hour and a half or so about your experiences as a manager or leader at the organizational level in outdoor programming, please click on the link below. It will allow me to collect your contact information independently of your survey responses.

jm [Click Here to sign up for an interview](#)

jm No, I will not participate in a follow up interview

15. Thank you.

Thank you, have a great day.

**SECTION I**  
**▲ Investigator's Assurance ▲**

Principal Investigator \_\_\_\_\_ E-Mail \_\_\_\_\_  
Co-Principal Investigator \_\_\_\_\_ E-Mail \_\_\_\_\_  
Other Personnel (GA, Project Mgr., etc.) \_\_\_\_\_ E-Mail \_\_\_\_\_  
Dept \_\_\_\_\_ PI ID No. \_\_\_\_\_ Date of Application \_\_\_\_\_  
Mailing Address \_\_\_\_\_ Campus Extension \_\_\_\_\_  
\_\_\_\_\_ Home or Work # \_\_\_\_\_  
Title of Proposed Study \_\_\_\_\_  
Proposed Duration of Project (months/years) \_\_\_\_\_ Anticipated Start Date \_\_\_\_\_  
Type of Funding (Federal/Federal pass-through/State/Foundation/Other/None) \_\_\_\_\_  
Funding Agency \_\_\_\_\_

Please note that data collection cannot begin until approval is granted by the HSRRC

**INVESTIGATOR'S ASSURANCE**

- A. I will promptly report changes in the proposed study and any unanticipated problems involving risk to subjects, including adverse reactions, to the Human Subjects Review Committee. In case of DHHS supported activities, I will also report these problems to the Department of Health and Human Services (through the respective granting office).
- B. I assure that documentary evidence of informed consent will be retained for at least three years after the proposed study has been completed or discontinued.
- C. Since the Committee is obligated to review this activity at least on an annual basis, I will furnish it with a progress report no later than six weeks prior to the expiration of my project's approval.
- D. I, the undersigned, will be responsible for the ethical standards of this project, and for protecting the rights and welfare of the subjects.

\_\_\_\_\_  
Signature of Principal Investigator Date

*I have read and approved this proposal:*

\_\_\_\_\_  
Department Head (PRINT) Signature Date

If this is part of a thesis/dissertation/project, the proposal must be approved PRIOR to HSRRC Review.

Masters Thesis  Masters Project  Doctoral Dissertation  Special Project

\_\_\_\_\_  
Dissertation/Thesis/Project Advisor (PRINT) Signature Date

\_\_\_\_\_  
Advisor's E-Mail Address:

Revised 6/06

Please complete and return this form, along with your HSRRC application, and copies to the HSRRC, Office of Research & Sponsored Projects (ORSP), 600 Unitus Bldg., Portland State University  
Phone: (503) 725-4288 / 1-877-480-4400



## **I. Project Title & Prospectus**

Outdoor Program Organizational Management and Administration Practices Investigation (OPOMAPI) is a graduate thesis research project using survey and interview instruments in the social sciences tradition. OPOMAPI will investigate the relationship between trip and multi-program management level leadership, administration and management practices. OPOMAPI will also assess outdoor program managers training; including the training received, its relevancy and training needs. Interpretation of the data will connect the results of the survey and interviews to existing management practices with an eye to general management practices, recreation management and environmental leadership literature.

With authors from Richard Louv (2005), to Gary Paul Nabhan (1994) to Rachel Carson (1965) clamoring for young people to spend more time in the outdoors and declining number of adults participation in guided or facilitated outdoor recreation programs every year, the outdoor program industry is changing, like many other industries in the 21<sup>st</sup> century. Various management authors, such as Jim Collins (2001), Jim Kouzes and Barry Posner (2001), Michael Fullan (2005), and John Gordon and Joyce Berry (2006) note that change management is among the most important functions of management and leadership, this study aims in part to see if outdoor program managers believe that this, in addition to other current management theories, holds true for their work as well.

The survey instrument (see appendix A) will be delivered via the SurveyMonkey web-based survey provider. Estimated sample size is 75 to 100. Each participant will be asked if they are willing to participate in a follow up interview. Ten to twelve respondents will be selected to participate in the interview. (See appendices G and H) Participants will be selected that are representative of all the types of programs represented in the survey respondents. The interview will be a semi-structured, ethnographic dialog. This endeavor acknowledges the positivist paradigm, and explicitly accepts that the subjects of the research, as well as the researcher, are human beings, reflecting on their experiences as managers, administrators and leaders and interpret meaning from the basis of their own unique experiences.

## **II. Exemption Claim for Waiver of Review**

This study is not exempt from human subject review.

## **III. Subject Recruitment**

The subjects of OPOMAPI are managers and administrators of outdoor program providers. It is highly unlikely that any individual in a management position would be unable to consent for themselves, however the survey will include demographic questions including age, and any respondent indicating an age under 18 will be deleted from the files. Anecdotally, the outdoor recreation field in general is made up of a disproportionate number of white men compared to the general population, however no one will be

excluded due to their gender or ethnic group, and no one of the age of consent will be excluded.

Survey and interview participants will be recruited via e-mail from an e-mail list currently under development. E-mails are being harvested from the websites of programs that provide guided or facilitated overnight outdoor program activities including: outdoor school, for profit and non-profit outdoor recreation, outdoor skills training, outdoor behavioral healthcare and similar programs. Participants will also be encouraged to share the survey link with their colleagues in an attempt to broaden the reach beyond publicly available e-mail addresses. A link will also be placed on selected websites related to outdoor programming. (Appendix D)

#### **IV. Informed Consent**

I would like to request a waiver of written consent for the survey portion of the study.

Informed consent will be garnered from a cover letter for the survey, three variations of the cover letter will be used, two informal letters in the recruiting e-mails and one, more formal letter, in on the initial page of the web-based survey. (See appendices A, B and C) First, after reading the informed consent information, the participants will need to click on the link embedded in the e-mail to access the survey. Once at the survey web-page, participants will need to read the informed consent information, and click “I understand these terms and consent to participate in this survey to continue to the survey questions. They will have the option of clicking “I do not agree or understand” which will cause their browser to exit from the survey.

For the interview portion, an informed consent form will be signed by the interviewee at the outset of the interview. The consent process and purpose of the interview will also be explained verbally to the interviewee. (See appendices G and H)

#### **V. First-Person Scenario**

‘I received an e-mail a few weeks ago asking me to take the time to participate in a survey about outdoor program management. About a week later, I received a follow up e-mail with a link to a survey. I passed the e-mail on to a couple of my friends in the industry and then I clicked on the link in the survey. I quickly read over the informed consent language before clicking to accept the information and start the survey. The survey took about 20 minutes, I answered a bunch of questions about managing staff and what is important to me as a manager of an outdoor program, what kind of training I received, etc. At the end of the survey it asked me if I would like to participate in a follow up interview, there was a note explaining that my contact info would be kept separate from my survey responses by taking me to a separate survey. I thought that would be great, so I entered in my e-mail address and phone number

Just last week I got a phone call from Travis, the researcher, asking me when a good time for an interview would be, he’s in Portland and I’m in Georgia, so we arranged for a

phone interview. He e-mailed me a consent form to sign and I faxed it back to him, he also mailed me a stamped pre-addressed envelope so I could mail him the original, I kept a copy for my files, like he suggested. We talked for a little over an hour this morning. It was pretty conversational after he read me the consent info and asked if I had any questions and made sure I was still ok. He told me he was recording the interview so he could transcribe it later. We talked about managing outdoor programs, some of the challenges, what kind of training would have been useful, and what I thought about some of the management books out there and how they applied to my job.

## **VI. Potential Risks and Safeguards**

There is a minimal risk of harm associated with participation in the OPOMAPI survey or interview. The survey is estimated to take about 20 minutes, and the interview about 90 minutes. Participation is entirely voluntary. It is possible, but highly unlikely, that a respondent may reveal some proprietary information about their employer in the survey or interview. However, there will be no question in the survey that notes the name of the respondent or the name of their employer. Survey respondents interested in participating in the interview portion of the research project will be asked to supply their contact information. The contact information will be collected and stored separately from survey data by means of a second survey in SurveyMonkey opened when respondents click on “I am interested in participating in a follow up interview.” (See appendices A and E) No attempts will be made to review, record, or otherwise use the IP addresses of respondents.

Names of interviewees will be changed in transcription and publication. The names of the interviewees’ employers, if noted, will be changed to “employer” or “organization” in transcription and publication.

## **VII. Potential Benefits**

With the lack of literature related to the management of outdoor programs, the benefits of the OPOMAPI study include increased awareness about management issues, a framework in which to discuss them and an opportunity for professional development. It is the intention of this researcher to share the results of the study broadly within the outdoor industry.

## **VIII. Records & Distribution**

OPOMAPI Survey data will be collected, stored and analyzed electronically. No identifying information will be collected as part of the survey. Contact information will be collected and stored separately from survey data. Electronic copies of the survey data will be stored both in the researcher’s password protected, external hard drive and on the PSU network in the researcher’s folder for at least 7 years. The data will be archived and may be used for additional research at later dates.

OPOMAPI interview data will consist of audio recordings and transcriptions. Any identifying information contained in the audio recordings will be changed during

transcriptions, interviewees will be assigned alternate names alphabetically based on the date of the interview, employers will be identified generically as “the employer” or “organization” etc. during transcription. The pseudonyms and generic references will be used consistently during the course of research and in the period thereafter. Audio will be recorded digitally, and both audio files and transcriptions will be stored both in the researcher’s password protected external hard drive and on the PSU network in the researcher’s folder for at least 7 years. It is anticipated that the data may be used for additional research at later dates.

## References:

Carson, Rachel. (1965). *The Sense of wonder*. New York: Harper and Row.

Collins, Jim. (2001). *Good to Great*. New York: Harper Collins.

Fullan, Michael (2005) *Leadership and sustainability: Systems thinkers in action*. Thousand Oak, CA: Corwin.

Gordon, J.S. & Berry, J.K. (2006). *Environmental Leadership Equals Essential Leadership: Redefining who leads and how*. New Haven: Yale University Press.

Kouzes, J. & Posner, B. (2003) *The Leadership Challenge, 3<sup>rd</sup> Ed*. San Francisco: Josey-Bass.

Louv, Richard. (2005) *Last child in the woods: saving children from nature deficit disorder*. Chapel Hill: Algonquin.

Nabhan, G.P., Trimble, S. (1994) *The Geography of childhood: why children need wild places*. Boston: Beacon Press.