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AUTHOR Freidline, Mark, Ed.; Phipps, Maurice, Ed.; Moore, Tim, Ed.; Versteeg, Julie, Ed.

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## ABSTRACT

This proceedings contains 15 conference papers and presentation summaries from the 14th annual International Conference on Outdoor Recreation and Education (ICORE). Titles are: "The Hidden Costs of Outdoor Education/Recreation Academic Training" (Christian Bisson); "The Service Learning Concept: Service Learning in the National Parks" (Tom Coates); "Columbus Outdoor Pursuits: A Model Structure for Volunteer Based Outdoor Pursuits Programs" (Ann E. Gerckens); "Navy Morale, Welfare, and Recreation: Outdoor Recreation Rental Center Manual" (Ed Dunning); "International Federation of Mountain Guide Associations (IFMGA) Ropehandling Techniques" (Iain Stewart-Patterson); "Whitewater Kayaking Instruction: Skills and Techniques" (Raymond Poff, Tom Stuessy); "Re-creating through Recreating into the Later Years" (Mary Ann Kluge); "The Importance of Manuals in the University of Wisconsin at Stevens Point's Outdoor Program" (Kate Skroski, Emily Cook); "Marketing Outdoor Programs: A Roundtable Discussion" (Tom Stuessy); "Managing Field Evacuations" (Jay A. Satz, David McEvoy, Kurt A. Merrill); "Emergency Response Systems for Outdoor Programming" (Jay A. Satz, Kurt A. Merrill); "Processing for Picasso and Other Masters" (Tammie Stenger, Beth Ryan); "An Alaskan Expedition: Student Development plus Academics Equals Experiential Education" (Wayne Williams, Rich Campbell); "Planning, Organizing, and Running a River Cleanup" (Bruce Saxman); and "Effective Buying Techniques for Outdoor Program Equipment" (David J. Webb). The proceedings also includes a brief history of the conference, the conference schedule, National Outdoor Book Awards, and AORE (Association of Outdoor Education and Recreation) Leadership Awards. (SV)

# 14<sup>th</sup> Annual International Conference on Outdoor Recreation & Education

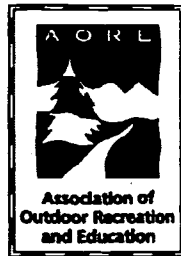
## ICORE 2000 Conference Proceedings

Hosted by Miami University  
Oxford, Ohio  
November 8-12, 2000



**What We Learn  
Along The Way**

Published by:



**The Association of Outdoor Recreation  
& Education  
(AORE)  
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# **PROCEEDINGS OF THE 14<sup>TH</sup> ANNUAL INTERNATIONAL CONFERENCE ON OUTDOOR RECREATION AND EDUCATION**

**ICORE 2000 hosted by Miami University  
Oxford, Ohio**

**November 7-12, 2000**

Edited and Prepared by:

**Mark Freidline, Miami University**

**Dr. Maurice Phipps Western Carolina University**

**Tim Moore, Miami University**

**Julie Versteeg, Miami University**

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9 November 2000

Dear ICORE 2000 Participants:

Welcome to the 14th Annual International Conference on Outdoor Recreation and Education, the annual meeting of the Association of Outdoor Recreation and Education (AORE). I feel this conference has always provided a valuable resource of committed colleagues and friends who are willing to share information and skills that reenergize conference participants and strengthen our profession.

In the spirit of sharing information and resources, the theme selected for this year's conference is, "WHAT WE LEARN ALONG THE WAY." Once again, through the grass roots effort of AORE members and other presenters, we have the opportunity to develop our knowledge, skills, and relationships. With 58 educational sessions, 4 keynote speakers, 13 pre and post-conference programs, 18 exhibitors, a career center, a climbing competition and campfire jam session, this year's conference is packed with opportunities to learn and grow together.

The development and administration of this conference requires the work of many people. I would like to thank those who have worked so hard to make this event possible including:

- Rick Harwell and the staff at Clemson University for their assistance and guidance;
- The AORE Board of Directors for their direction and support;
- All conference presenters for developing quality educational programs;
- The Student Staff of the Miami University Outdoor Pursuit Center;
- Professional Staff of the Miami University Outdoor Pursuit Center, including: Lisa Canterbury, Julie Versteeg, Mark Freidline, Nate Bondi, and Paul Stern;
- The Recreational Sports Center and the Shriver Center Staff, for their assistance and support;
- Our major corporate media sponsor, Backpacker Magazine, represented by John Viehman and Jonathon Dorn;
- Conference sponsors, the Brunton Company, represented by Jon Cox and Dave Glenn; and the Coleman Company;
- And, finally my wife, Carrie and our daughter Megan for bearing with me during this past year.

Immerse yourself in the conference experience. Get involved in educational and roundtable discussions. Get active in hands-on sessions and recreational activities. Visit the exhibit hall to learn about new programs and equipment, and develop relationships with the exhibitors who have supported our conference. In addition, take some time to enjoy yourself, socializing with friends or hiking along the trails around campus. This is your conference; let's make the most of it!

Looking down the trail, we should begin to make plans to attend next year's conference at Idaho State University. Please lend your support and a hand to Peter Joyce and his staff. Let the journey continue, and discover what you can learn along the way.

Sincerely,

Tim Moore, Chair, ICORE 2000



THE MAGAZINE OF WILDERNESS TRAVEL

November 2000

33 EAST MINOR STREET  
EMMAUS, PA 18098-0099  
PHONE (610) 967-5171  
FAX (610) 967-8181

Dear Outdoor Educator:

**Welcome to the 2000 International Conference on Outdoor Recreation and Education.**

Congratulations to the Association of Outdoor Recreation and Education for coordinating this important gathering. BACKPACKER magazine is proud to be the media sponsor for this prestigious event and delighted that our managing editor, Jonathan Dorn, is among the impressive list of speakers presenting at this year's conference.

As the leading source of information about wilderness travel in North America, BACKPACKER recognizes the vital role that AORE plays within the outdoor community. One of our programs designed to support its efforts is BACKPACKER's Outdoor Scholarship program, which annually awards \$1,000 scholarships to college-level juniors and seniors who demonstrate extraordinary outdoor writing and outdoor leadership skills. The overwhelming and enthusiastic response to our scholarship program reminds us that as a business leader, we have a responsibility to encourage continued participation and leadership in outdoor activities.

The International Conference on Outdoor Recreation and Education is an excellent forum for discussion of these important issues among professionals. So it is with great pleasure that BACKPACKER magazine provides the proceedings book for the 2000 International Conference on Outdoor Recreation and Education. Enjoy the conference!

Sincerely,

A handwritten signature in black ink, appearing to read "John Viehman".

John Viehman  
Publisher  
BACKPACKER magazine

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# A Brief History of the International Conference on Outdoor Recreation and Education



**1984: Bozeman, Montana.** Sponsored and organized by the University Outdoor Programs from Montana, Idaho and Illinois, this was the first National conference devoted solely to non-profit outdoor recreation and education providers. In planning this conference, Mike Caveness met with ACUI and Ron Watters met with NIRSA, these organizations endorsed the conference and allowed the planning group to publicize the event at their annual meetings. Ron Watters met with Jim Rennie in May of 1984 and subsequently the planning team of Rennie, Watters, Caveness, Dudley Improta, Steve Johnson, Gary Grimm, Bill March, Tom Whittaker, and Jim Rogers was solidified.

Buzzing with energy and excitement, this early gathering, simply called the conference on outdoor recreation, reflected the passions of a nascent field. It was enlightening and inspiring as much as it was delightfully contentious and unruly, as was the case during a heated and animated panel discussion on certification. Always there was the feeling of camaraderie and optimism that outdoor programs had come upon a vehicle to share common interests and concerns. This first conference included many hands-on sessions, open discussions, and several sessions on programming for participants living with disabilities. 185 participants.

**1986: Davis, California.** Energized and committed to the early foundation set by the Bozeman conference, several Universities from California organized the second national outdoor gathering. The Davis conference added new dimensions, including a sobering dramatization of the court proceedings of an outdoor liability case and a trade show. It was also marked with light-heartedness. At one evening program, the field of outdoor education was parodied by an ad-lib comedy troop. The conference name evolved to: National Conference on Outdoor Recreation. Steve Leonoudakis, Dennis Johnson, Rodney Neubert, and Mike Caveness worked to organize this conference. Following this conference, Jim Rogers wrote an inquiring letter that gave rise to the question of organizing the group as an association. This letter started a series of discussions and debates over this issue that would last for seven years. 274 participants.

**1988: Fort Collins, Colorado.** Colorado State University continued the now emerging conference pattern. Remarkably, the Colorado conference, like the two previous conferences was not managed and supervised by an association, as are most other conferences. It was organized in manner of true common adventure, solely by cooperation and volunteer effort. In Fort Collins, as the other conferences, participants debated the formation of an Association, but on the whole, they simply wanted to network and work together cooperatively, unencumbered by the control of an outside authority. 304 participants.

**1990: Boone, North Carolina.** The first eastern conference was held in the beautiful Broyhill Inn and Convention Center on the hilly, forested slopes of the campus at Appalachian State University. At Appalachian State University, the Association of Experiential Education made a strong push to assimilate the National Outdoor Recreation Conference into their organization, but conference attendees once again demonstrated their inclination towards independence and declined the overture. During this conference, Dave Webb was recognized by his peers with the Outdoor Leadership Award. At this conference, there was also a great deal of discussion concerning holding the conference every other year or annually. Jim Rennie announced to the group that he planned to host the conference in 1991, starting the trend of an annual conference for our non-association. 303 participants.



**1991: Moscow, Idaho.** Returning to the west at the University of Idaho, the conference went through another name change. From its inception, the conference had attracted a strong contingent from Canada, and it now became known as the International Conference on Outdoor Recreation. At the 1991 conference, Jim Rennie was honored as the recipient of the Outdoor Leadership Award. 151 participants.

**1992: Calgary, Alberta, Canada.** Living up to its new moniker, the conference headed north of the border and truly became international in scope. At the University of Calgary, conference participants could unwind after a busy day by bouldering on a climbing wall which, to everyone's amazement was most conveniently located in the Outdoor Program Centre's office. Other participants unwound more unconventionally by taking a wild run down the Olympic Luge course. It was at this conference that participants authorized the formation of an Association Development Committee by a 2/3 vote of those attending to develop a plan to organize the group as an international association and identified conference sites for the next two years. In Calgary, the Outdoor Leadership Award was presented to Jim Rogers. 359 participants.

**1993: Corvallis, Oregon.** After nearly ten years of debate about the "A" word, the big step was taken at Oregon State University. The Association of Outdoor Recreation and Education was created by conference participants and became organized under the auspices of The Outdoor Recreation Coalition of America (ORCA). The Conference name went through one final change, becoming the International Conference on Outdoor Recreation and Education. In the initial meetings of the newly formed association, student voting became an important issue, task forces were developed to address issues of common concern, and Ron Watters was honored with the Outdoor Leadership Award. 166 participants.

**1994: Colorado Springs, Colorado.** For the first time, a branch of the United States Armed Forces, the US Army Community and Family Support Center hosted the conference. Attendees came from throughout the world and enjoyed one of the most memorable social gatherings of any of the conferences; a barbeque and hoe-down held at the Fort Carson Army Base in a huge tent, which, when the music started, quickly filled with the dust rising above the thunder of dozens of stomping feet. 320 participants.

**1995: Ithaca, New York.** Cornell University hosted the conference and decorated the Alberding Field House with live pine trees. Rising above the Alberding forest was the Lineth Climbing Wall, which was available throughout the conference for climbing. Presenting at the conference were some distinguished founders of the modern outdoor recreation movement including Paul Petzoldt, Josh Miner, and Royal Robbins. 319 participants.

**1996: Salt Lake City, Utah.** With striking views of the mountains surrounding A. Ray Olpin Union, the University of Utah graciously hosted the 10<sup>th</sup> ICORE. Featured speakers included Denise Mitten, Executive Director of Woodswomen, Inc, and renowned climbers/adventurers Conrad Anker and Doug Robinson. AORE presented the first Jim Rennie Leadership Award to David Secunda and the first Bill March Student Achievement Award to Russell Parks. 348 participants.

**1997: Merida, Yucatan, Mexico.** In keeping with its international title, the 11<sup>th</sup> ICORE headed south to the beautiful city of Merida, capital of the state of Yucatan. It was a true international partnership with the Universidad Autonoma de Yucatan serving as conference host and the University of Nebraska- Lincoln handling the overall coordination. Visits to the Mayan ruins and the closing dinner and Folkloric Dance show made for an unforgettable conference. Tim Moore was honored with the Jim Rennie Leadership Award, and Brian Wilkinson was recognized with the Bill March Student Achievement Award. 110 participants.

**1998: Fort Walton Beach, Florida.** ICORE '98 came together October 20-24<sup>th</sup> in beautiful Fort Walton Beach, Florida with the Air Force Outdoor Recreation Community as the host. With the Gulf of Mexico sand dollar throw from the hotel, the 188 conference participants felt right at home. Early arrivals took part in three two-day training seminars and seven 1-day activities ranging from a deep sea-fishing trip to an afternoon dolphin cruise. The Opening Social and Awards Banquet was held at the Eglin AFB Officers Club located on scenic Choctawhatchee Bay. AORE's Jim Rennie Leadership Award was presented to Jim Fullerton, who served the Association as President, ICORE '97 coordinator, hard-working board member, and mentor to many in the outdoor industry. An emotional high point was Tom Whittaker's incredible multi-media session One Foot on the Road to Everest, covering his recent expedition. Spellbound and inspired, we shared a personal odyssey that took him from a "never walk again" prognosis to being the first disabled person to summit Mt. Everest in May 1998. The final day saw a lengthy and difficult membership meeting culminating in the decision for AORE to end its five-year relationship with the Outdoor Recreation Coalition of America (ORCA) and form an independent, not-for-profit association. The closing social and Hawaiian Luau was held poolside in the courtyard replete with native, and not-so-native dancers. A selection of eleven different post-conference activities was offered to bring ICORE '98 to a close. 188 participants.

**1999: Jackson Hole Wyoming**

How fitting to hold the 13th ICORE in Jackson Hole, Wyoming, a conference dedicated to the passing of an old friend, Paul Petzoldt. The 13th ICORE was hosted by Clemson University and was held at the Snow King Resort. Attendance was a record high 350 and pre-conference workshops on LNT, WFA and Risk Management were full. The Association leadership reported on a year filled with changes that included a new management company and restructuring the AORE to plan for the future. Highlights of the conference included over fifty educational sessions, over 30 exhibitors, and an excellent keynote address by John Gans, Executive Director of NOLS. Robert Taylor, undergraduate student at Clemson University was awarded the Bill March Student Achievement Award and Rob Jones was honored with the Jim Rennie Leadership Award by the AORE. The conference was the one of the best attended in AORE's history, and the feedback was excellent. Snow King proved to be a superb location with its easy access to the Grand Teton National Park and the beautiful Jackson Hole area. 350 participants.

**2000: Miami University, Oxford, Ohio.**

If there's one word that can be used to sum up ICORE 2000, it is this: warmth. When participants arrived in Oxford, Ohio they were greeted by welcoming smiles, which set the tone for the rest of the conference. Throughout the conference, the atmosphere had a down home, mid-western feel to it: friendly, kind-hearted and as comfortable and inviting as a steaming bowl of grandma's soup on a cool November day. It is also a conference that will be remembered for its excellent planning and organization, and for one of the most diverse and busy programs of educational sessions ever.

Evening program speakers included Gudy Gaskill, the diminutive, power-house of a woman whose persistence and leadership for 27 years resulted in 500-mile Colorado Trail. The following evening Paul Piana, in a refreshingly unpretentious and light-hearted style, narrated a video of a big wall climb and had conference participants nearly rolling in the aisles with laughter.

In a dramatic moment on the final evening, the room was darkened, and a video flashed on the screen. To the score of Chariots of Fire, the video showed a blind man and his dog hiking the Appalachian Trail. The man stumbled and fell, but with help of his dog he rose and continued. And then again he fell, and again and again, but each time he would struggle to his feet and doggedly continue on his way. The video was turned off, the lights came on, and Bill Irwin and his dog Orient walked on the stage. The audience immediately rose to their feet and Irwin was welcomed by a long and thunderous ovation. It was an entrance and presentation few will forget.

These are just a few of the highlights. Of course, there was much more. Participants attended over 50 educational sessions. The pre and post workshops were busy, and the professionals and students networked and shared information. Indeed, the Oxford conference was a significant event in the field of outdoor recreation and education and a hopeful start to the new century. 384 participants.

THURSDAY, NOVEMBER 9	10:00-11:30p	11:30p-12:30p	12:30-2p	2:30-4p	4:30-6p	6:30p-7:30p	7:30p-8:30p	8:30p-8:45p	8:45p-9:45p
Outside - Miraculous OC in the ESC (newer backpack will be in Sports at Sports Event #3 in the ESC)	Exhibit Hall Booth	Exhibit Hall Booth	Exhibit Hall Booth	Exhibit Hall Booth	Exhibit Hall Booth	Exhibit Hall Booth	Exhibit Hall Booth	Exhibit Hall Booth	Exhibit Hall Booth
6-7a	Bachelor Trials Run or Walk								
8-9:45a	AOBE Board Work Room	Conference Registration and Information	AOBE Board Work Room	AOBE Board Work Room	AOBE Board Work Room	AOBE Board Work Room	AOBE Board Work Room	AOBE Board Work Room	AOBE Board Work Room
10:00a-11:30a Conference Opening Session	<p><b>Conference Opening Session</b>            Jim Moore, Miami Recreational Sports  <b>Keynote Address:</b>  <b>Dr. Maurice Phipps</b>            Western Carolina University</p>								
Backpacker Magazine Sponsor Luncheon 11:30a-12:30p	AOBE Board Work Room	Conference Registration and Information	AOBE Board Work Room	AOBE Board Work Room	AOBE Board Work Room	AOBE Board Work Room	AOBE Board Work Room	AOBE Board Work Room	AOBE Board Work Room
12:30-2p Educational Session	AOBE Board Work Room	Conference Registration and Information	AOBE Board Work Room	AOBE Board Work Room	AOBE Board Work Room	AOBE Board Work Room	AOBE Board Work Room	AOBE Board Work Room	AOBE Board Work Room
2:30-4p Educational Session	AOBE Board Work Room	Conference Registration and Information	AOBE Board Work Room	AOBE Board Work Room	AOBE Board Work Room	AOBE Board Work Room	AOBE Board Work Room	AOBE Board Work Room	AOBE Board Work Room
4:30-6p Educational Session	AOBE Board Work Room	Conference Registration and Information	AOBE Board Work Room	AOBE Board Work Room	AOBE Board Work Room	AOBE Board Work Room	AOBE Board Work Room	AOBE Board Work Room	AOBE Board Work Room
6:30p-7:30p	<b>Dinner</b>								
7:30p-8:30p	<b>NOBA Committee (National Outdoor Book Awards)</b>								
8:30p-8:45p	<b>Welcoming Address: Mr. Steve Cady, Assistant VP of Business and Finance</b>								
8:45p-9:45p	<b>Evening Speaker: Mr. Gault Casbill Introductions: Lisa Camberlain</b>								



Location & Time	Ben Harrison Room	MPR Reception Lounge	Sprinter MPR A	Sprinter MPR B	Sprinter MPR C	Heritage Room	CS Heritage	RT System and Whitaker Reid Room	Rm 241 Shifters	Mount Indian Room	RSC Dry Classroom	RSC Wet Classroom	Pool	Climbing Center	Herston	Woods
6a-7a	Outside - Meet at the (non-walking back-up will be in Sports Forum Court #1 in the RSC)					Continental Breakfast - 9a Exhibit Hall and Career Center Open 7a-9p							Informal Swim	Informal Climbing		
7:30a-8:45a	Bachelor Track Run or Walk	Conference Registration and Information			Exhibit Hall & Student Career Center Open								Informal Swim	Informal Climbing		
9-10a Educational Sessions	ADRE Board Work Room	Conference Registration and Information	Sawtooth Film Festival Richard Carabone/Adventure Session #211	Risk Management Plans Preston Chie Session #212	Emergency Response Systems Kurt Merrill Risk Management Session #213	Exhibit Hall & Student Career Center Open	Candidate Interviews and Informal Meetings	Expert's Advice Differences in Outdoor Decision Making Shays Galloway Programing Session #214	Rental Equipment Selection David J Webb Management Session #215	Personality & Life Preferences in the Outdoors Timmie Singer Therapeutic Session #216	"Aberration of Use and Inhabited Strength Recreation When Plet Collier" Stefan Jackson & Craig Mackey Management Session #217					
10:30a-12p Educational Sessions	ADRE Board Work Room	Conference Registration and Information	Sawtooth Film Festival Richard Carabone/Adventure Session #211 continued	Risk Management Plans Preston Chie Session #212 continued	Emergency Response Systems Kurt Merrill Risk Management Session #213 continued	Exhibit Hall & Student Career Center Open	Candidate Interviews and Informal Meetings	Cash, Client, & Contact Building Programs Todd Mizer Management Session #221	Rental Equipment Selection David J Webb Management Session #215 continued	Preparation for a Career in Outdoor Recreation Tea Carter Educational Session #222	"Aberration of Use and Inhabited Strength Recreation When Plet Collier" Stefan Jackson & Craig Mackey Management Session #217					
12-1:30p Lunch on Own (Except Students)	ADRE Board Work Room	Conference Registration and Information			ADRE Annual "Student Only" Meetings w/ Lunch in Exhibit Hall											
1:30-3p Educational Sessions	ADRE Board Work Room	Conference Registration and Information	Sawtooth Film Festival Richard Carabone/Adventure Session #211 continued	Risk Management Plans Preston Chie Session #212 continued	Emergency Response Systems Kurt Merrill Risk Management Session #213 continued	Exhibit Hall & Student Career Center Open	Candidate Interviews and Informal Meetings	Earth, Wind and Fire: Protection From Altitude, Cold and Sun Steven Abrahamson Medical Session #232	Navy's Outdoor Center Manual Ed Dunning Programing Session #233	Evidence of Outdoor Education in the Elementary Classroom Chery Prosser Educational Session #234	Teaching Map and Compass: Success & Pitfalls Dave Glenn Educational Session #235	OSHA Blood Borne Pathogens Dr. David Johnson Medical Session #236	Adaptive Kayak Clinic Steve Bobbit Tom Edwards Therapeutic Session #237	Getting a Grip on Lead Climbing Tom Kopp Educational Session #238		
3:30-5p Educational Sessions	ADRE Board Work Room	Conference Registration and Information			Exhibit Hall & Student Career Center Open	Candidate Interviews and Informal Meetings	Candidate Interviews and Informal Meetings	Making Meaning in Outdoor Education by Robert Fugler Facilitation Session #241	Sitting Through the Certifications Franzy Jim Rogers & Tom Stuary Awardable Session #242	Program Promotion & Advertising Jim Rogers & Tom Stuary Awardable Session #243	Teaching Map and Compass: Success & Pitfalls Dave Glenn Educational Session #235 continued	Learn to Learn From Frustrating Peak Tom Edwards Risk Management Session #244	Adaptive Kayak Clinic Steve Bobbit Tom Edwards Therapeutic Session #237 continued	Getting a Grip on Lead Climbing Tom Kopp Educational Session #238 continued		
5p-6p						Exhibit Hall & Student Career Center Open	Candidate Interviews and Informal Meetings									
6-7p						Exhibit Hall & Student Career Center Open	Candidate Interviews and Informal Meetings									
7:00p-8:00p						Exhibit Hall & Student Career Center Open	Candidate Interviews and Informal Meetings									
8:30p-10p	Pedfer Peak Music/Campfire					Exhibit Hall & Student Career Center Open	Candidate Interviews and Informal Meetings									
10p-11p						Exhibit Hall & Student Career Center Open	Candidate Interviews and Informal Meetings									



Session & Time	Ben Harrison Rm	NPR Receiving Lounge	Shelver NPR A	Shelver NPR B	Shelver NPR C	Heritage Room	CS Harrison	RT Byrdson and Whitaker Reid Room	Rm 244 Shelter	Miami Indian Room	RSC Dry Classroom	RSC Wet Classroom	Pool	Chalking Center	Diverse	
7-9a		Conference Registration and Information				Continental Breakfast 7:30-9:30 Exhibit Hall & Career Center Open										
9-10a Educational Sessions	AORE Board Work Room	CONFERENCE Registration Ends at 9am. Information table will stay open for ICORE participant assistance	Massage Backcountry Excursions Kurt Merrill & Devin McEvoy Kick Management Session # 311	Psychologist as Everest Scott Wood Therapeutic Session #312	Stamp the Lawyer Jim Moss Risk Management Session #313	Exhibit Hall & Career Center Open	Candidate Interviews and Informal Meetings	The Service Learning Concept Dr. Tom Coster Education Session #314	Graduate Admissibility for Domestic Tim King Education Session #315	Preparing for Picasso & Other Masters Tammie Stager & Bob Ryan Facilitation Session #316	IFMGA Rep: Handling Tim Stewart-Patterson Session # 317	Amputation of Limb for Amputations Like Yours Stefan Jackson & Craig Mickey Education Session #318				
10:30a-12:30p No Educational Sessions AORE Annual Business Meeting	AORE Board Work Room	Conference Information	<b>AORE Annual Business Meeting</b>			Exhibit Hall & Career Center Open	Candidate Interviews and Informal Meetings									
12:30-1:30p Take a Student to Lunch	AORE Board Work Room	Conference Information				Exhibit Hall & Career Center Open	Candidate Interviews and Informal Meetings									
1:30-3p Educational Sessions	AORE Board Work Room	Conference Information				Exhibit Hall & Career Center Open	Candidate Interviews and Informal Meetings	Holdings and Disbursements VORL Annual Conference Mickal Holloway Ph.D. Hawthorth	Spotlight on Columbus Outdoors Parrutis Ann Gerchus Programing Session #322	By you, I Treat Christy Proster Education Session #323	Using Myers-Briggs in Leadership Development Steve Oubrie Therapeutic Session #324	Planning & Organizing a River Cleanup Bruce Staman Programing Session # 325	Kayak Rollout Jay Frain & Andrew Martin Education Session # 326	Self Recovery & Risk Ernest Steve Tomb Education Session # 327	I Tried So Hard Steve Sammons & Andy Durling Education Session # 328	
3:30-5p Educational Sessions	New AORE Board Meeting	Conference Information				Exhibit Hall and Career Center Closed/ Breakdown	Candidate Interviews and Informal Meetings	Wilderness Based Orientation from Western State College Matt Tyler Programing Session #329	Spotlight on Columbus Outdoors Parrutis Ann Gerchus Programing Session #322 continued	Top Programs Jim Rogers Knowledge Session #332	Using Myers-Briggs in Leadership Development Steve Oubrie Therapeutic Session #324 continued	Take the Edge - Adventure Rating West Texas Style! Corey Franklin & Laina Morales Programing Session #333	Kayak Rollout Jay Frain & Andrew Martin Education Session # 326 continued	Self Recovery & Risk Ernest Steve Tomb Education Session # 327 continued	I Tried So Hard Steve Sammons & Andy Durling Education Session # 328 continued	
6:00p - 7:00p			<b>Closing Banquet</b>													
7:00p - 7:30p			<b>AORE Awards</b>													
7:45p - 8:45p			Closing Speaker: Mr. Bill Irwin "Blind Courage" Introductions: Susan Howell													

## **ICORE Pre-Conference Workshops and Symposia – November 7 & 8**

### **# 1 – WFR Re-certification**

**Tuesday & Wednesday, Nov. 7-8, 9am-6pm**

**Conducted by Shana Tartar (WMI)**

Are your wilderness medicine protocols on the tip of your tongue or in the bottom of your pack? This two day scenario-based course is designed as review and practice of evacuation and decision making guidelines. It also provides wilderness medicine practitioners with current updates in the wilderness medicine field. It may be used to re-certify current Wilderness First Responder and Wilderness EMT (wilderness portion only) certifications from the following organizations: WMI, NOLS, SOLO, and WMA. 16 hours.

### **#2 - Outdoor Recreation Risk Management Seminar**

**Tuesday & Wednesday, Nov. 7-8, 9am-6pm**

**Conducted by Attorney Jim Moss**

This two-day seminar is designed to provide an Outdoor Recreation Program with the necessary knowledge and paperwork to protect against a lawsuit and, if necessary, defend one. The first full day covers releases, waivers, and assumption of risk documents. After proactive practices these documents are the first line of defense between an outdoor recreation program and a possible lawsuit. The second full day explains how to prepare a risk management plan for an outdoor recreation program. All aspects of risk management for an outdoor recreation program will be covered.

### **# 3 – NOLS Leave No Trace Trainer Workshop**

**Tuesday & Wednesday, Nov. 7-8, 9am-6pm**

**Conducted by LNT / NOLS**

This sixteen-hour workshop is designed for educators, guides, agency employees and other outdoor professionals. Participants will learn the concepts of LNT and prepare to teach the LNT curriculum in a variety of settings: schools, camps, parks, wilderness and front country areas. Workshop topics will include a combination of field experience and classroom discussion. Participants who successfully complete this course become official LNT trainers. Enrollment is limited to twelve.

### **# 4 –The Nuts and Bolts of Building Portable Challenge and Adventure Equipment**

**Tuesday, Nov. 7, 9am-6pm**

**Conducted by Dr. Jim Cain**

This day workshop not only introduces the audience to challenge and adventure activities, but also teaches participants how to create their own portable challenge equipment. Jim is the innovator of more than two-dozen portable ground level challenge activities, many of which are now commercially available from Alpine Towers International. He has designed corporate programs for NASA, taught and facilitated college and secondary school programs, designed and built challenge courses on two continents, and created a variety of innovative activities that encourage teamwork, creative problem solving, communication, character development, decision making and trust. Dr. Cain also serves as a visiting professor on subjects such as experiential education, challenge and adventure-based activities, recreational dancing and games leadership, structural engineering, and chaos and powder mechanics.

### **# 5 – Climbing Trip to the Red River Gorge**

**Tuesday, Nov. 7, 6am-10pm**

The Red River Gorge is one of the most popular climbing areas in the country. It's rusty red sandstone and famous pocketed, overhanging climbs provide for enjoyment at any level. This recreational trip to the Red provides a good chance to meet other climbers in the field, relax and see some beautiful and challenging climbing terrain. The Red River Gorge offers easy access to climbs rated from 5.4 to 5.12D. Equipment and transportation will be provided but feel free to bring any personal gear as well. Helmets will be required.

### **#6 - Caving Trip**

**Wednesday, Nov. 8, 6am-10pm**

Clamber over rocks and belly crawl through tunnels. This trip to Rockcastle County, Kentucky, a favorite caving area, will allow outdoor professionals, educators, guides and students a chance to explore incredible, subterranean environments. Participants will have the opportunity to enjoy a day of networking and getting dirty. Equipment and transportation will be provided but feel free to bring any personal gear as well. Don't forget your headlamp!

### **# 7 – Climbing Center Symposium**

**Wednesday, Nov. 8, 9am-5pm**

Anyone interested in designing a wall for their facility or just interested in new ideas should attend this symposium. We will take a tour of some of the best indoor walls in the Greater Cincinnati area. Learn about what materials were used in building the walls, risk management, rentals and product sales. Miami will provide the transportation for this tour.

## **ICORE Post – Conference Workshops and Symposia - November 12**

### **# 8 – WFR Simulation**

**Sunday, Nov. 12, 8am-12pm**

**Conducted by Fiona Stringer (WMI)**

Ready or not, here you come! The most difficult thing about wilderness medicine is that every patient is an unexpected pop quiz. Get rid of your pre-test jitters and spend the morning refreshing your skills through challenging wilderness medicine scenarios. The session will be run in an outdoor environment regardless of weather conditions. Simulations will involve realistic injuries and make-up to enhance learning. Participants will be expected to problem solve and make decisions regarding patient care and evacuation options. Plan to spend plenty of hands-on time with patients and don't be surprised if you come home a little wet and muddy!

### **# 9 - Rock Rescue Symposium**

**Sunday, Nov. 12, 8am-12pm**

**Conducted by Iain Stewart-Patterson**

Your partner has fallen and they can't get up. The rescue systems needed to assist a fallen climber may vary due to a number of factors (injury, location, weather, etc.). This workshop will introduce participants to several generic skills, which can be applied, in a variety of situations.

### **# 10 – Orienteering Meet**

**Sunday, Nov. 12, 8am-12pm**

**Sponsored by Orienteering Cincinnati & Brunton**

Try orienteering! You will use a map and compass to navigate to a series of checkpoints called controls. There will be instruction for beginners, a course suitable for first-timers, and also more advanced courses for those who already have some orienteering experience. An orienteering program has applications across the curriculum from sciences, social studies, math, language arts, physical education, and more. Learn how you can use orienteering with your students by experiencing this adventure for yourself. The course will take place at Hueston Woods State Park, 10 minutes drive of Miami University. Instructors include Mike Minium, Vice President for Program Development of the United States Orienteering Federation, and there will be awards and give-away prizes provided by the Brunton company. A shuttle for this activity will meet and leave from the Outdoor Pursuit Center. For more information about orienteering, see the US Orienteering Federation web site, <http://www.us.orienteering.org>.

### **# 11 – Sailing Trip**

**Sunday, Nov. 12, 7am-2pm**

**Conducted by the Navy & Miami Staff**

Are you a salty sailor, a deck hand or just along for the ride? Any of these will fit in this fall sailing trip to Brookville Reservoir. Enjoy a day in the sun maneuvering Flying Juniors through the wind. This recreational trip is fun for every level of sailor. Make new friends, contacts and share ideas about the sport. Transportation, boats and personal floatation devices (PFD) will be provided. If you have a personal PFD that you would like to bring then please do so. This trip is limited to 8 persons.

### **# 12 – Fly Fishing Trip**

**Sunday, Nov. 12, 6am-2pm**

**Miami University - OPC Staff**

Fly fishing and Ohio, two things not normally discussed in the same breath. Travel with us and discover how that's all about to change. Dig out your wool hat and fingerless-fleece gloves and join us on the Mad River for a day of fly-fishing. Learn innovative fishing knots, expose yourself to the basics of different casting techniques, and receive localized input on regional fly patterns on one of Ohio's trophy trout fisheries. No experience, no problem! We can cater to every level, from extreme novice to seasoned fly-shaker. Bring your willingness to learn and some warm clothes--we'll see you on the water. A shuttle for this activity will meet and leave from the Outdoor Pursuit Center.

**NATIONAL OUTDOOR BOOK AWARDS**  
*Summary of 2000 Recipients*

**Children's Book Category Winner #1:**

Blueberry Shoe

By Ann Dixon

Illustrations by Evon Zerbetz

Published by Alaska Northwest Books

This sweet and tender tale is about a baby's shoe that is lost while a family is picking blueberries. A wondrous scene unfolds as a sequence of creatures come along to sleep and play with the shoe. One, a bear, even thinks he might eat the shoe. Filled with colorful and enchanting illustrations and marvelously written, it's a book that will delight children and reassure their sense of belonging to the natural world. (For ages 4-8).

**Children's Book Category Winner #2:**

Jellies: The Life of Jellyfish

By Twig C. George

Published by the Millbrook Press

Beautifully photographed, Jellies is an extraordinary book which manages to make science appeal to the minds and hearts of children. It is rich in facts about this fascinating creature of the sea, but even richer in imagination and the joy of discovery. (For ages 8-10)

**Design and Artistic Merit Winner:**

Bradford Washburn Mountain Photography

Photography by Bradford Washburn

Edited and Compiled by Antony Decaneas

Published by the Mountaineers

Traveling the world for eight decades, mountaineer, explorer, scientist and cartographer Bradford Washburn has documented the world's landscapes like no other. This is his life's work as seen through his own camera: one hundred large format mountain photographs, all exquisitely reproduced. The book includes a short interview with Washburn, but it is the photos which speak volumes about him and his artistic genius.

**History/Biography Category Winner:**

The Wildest Dream: The Biography of George Mallory

By Peter and Leni Gillman

Published by The Mountaineers

Biographies don't get any better than this. Supremely well researched and documented, erudite, and masterfully written, this book isn't so much about what happened to Mallory in 1924 when he and his climbing partner Irvine disappeared in the mists of Mt. Everest, but rather it seeks the answer to another, almost more fascinating question: who was this man Mallory? This is the book to read to find the answer.

**Outdoor Literature Category Winner:**

On Celtic Tides: One Man's Journey Around Ireland by Sea Kayak

By Chris Duff

Published by St. Martin's Press

A transfixing memoir, On Celtic Tides is the vivid account of the first ever circumnavigation of Ireland by kayak. Told with sensitivity and care, Duff's odyssey is about a lone man and a capricious sea and its moods of tranquility and contrasting terror. But the book is more than an adventure story. It's also about haunting beauty, ancient history, and spiritual renewal found along the storm-lashed coasts of an enchanting land.



**Instructional Category Winner:**

The National Outdoor Leadership School's Wilderness Guide

By Mark Harvey

A Fireside Book Published by Simon & Schuster

The National Outdoor Leadership School is one of outdoor world's most respected wilderness education programs. They were one of the first schools to extensively promote and instruct wilderness users in the techniques of treading lightly and minimizing impact on the outdoors. This is their manual: a compilation of many years of experience, a backpacker's handbook filled with practical and well-tempered advice about equipment, planning, clothing, traveling, navigation, and safety.

**Nature Guidebook Winner:**

Guide to Marine Mammals & Turtles of the U.S. Atlantic and Gulf of Mexico

By Kate Wynne and Malia Schwartz

Illustrated by Garth Mix

Published by Rhode Island Sea Grant, University of Rhode Island

This is an extraordinarily well done and easy-to-use guidebook that will help you identify marine mammals while traveling the coastal waters of the east. Printed on water-resistant paper, it covers whales, dolphins, porpoises, seals, manatee and turtles. It's truly a model guidebook. Each and every detail has been designed with user convenience in mind, from its organization and layout, to its photographs and map graphics, to its carefully researched and understandable writing.

**Nature and the Environment Category Winner #1:**

Wildlife Wars: The Life and Times of a Fish and Game Warden

By Terry Grosz

Published by Johnson Books

Wildlife Wars is the absorbing story of one man's 30-year struggle to protect wildlife in America. This is what it's like on the front lines. Terry Grosz, a natural and gifted story teller, brings us face to face with a captivating cast of characters--on both sides of the law--as he matches wits with poachers, commercial hunters, and others who are bent on destroying America's natural heritage. If you start this book, you won't want to put it down. It's that good.

**Nature and the Environment Category Winner #2:**

Penguin Planet: Their World, Our World

By Kevin Schafer

Published by NorthWord Press

Some of the most endearing creatures in all of nature are penguins. They've often been photographed, but never have they been captured in such vivid detail and in all their intimate and strutting glory as in Penguin Planet. But Kevin Schafer not only takes sumptuous pictures, he writes well in an engaging style, generously complementing an affectionate portrait of the world's most popular bird.

**Classic Award Winner:**

A Sand County Almanac: A Sketches Here and There

By Aldo Leopold

Published by Oxford University Press

What can be said of A Sand County Almanac? It is simply one of the great works of nature literature and from it has sprung the environmental movement. This special edition of A Sand County Almanac, published by the original publisher, is a tribute to Leopold, commemorating the one-hundredth anniversary of his birth. It was over 50 years ago that the book was first published, but his words and insights are as fresh as ever.

**Outdoor Adventure Guidebook Category Winner:**

Guide to Sea Kayaking Central and Northern California

By Roger Schumann and Jan Shriner

Published by The Globe Pequot Press

Well designed and written, this is a splendid sea kayaking guide. The authors do what should be done in all guidebooks: show they're having fun! Even if you've never dipped a paddle, you'll be drawn in by the book's cheery personality. And then there are the maps. Created with the reader in mind, they are gems--pleasing to look at, easy to grasp, and accurate.

**Honorable Mention:**

Montana and Idaho's Continental Divide Trail

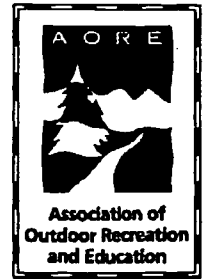
By Lynna Howard

Photography By Leland Howard

In the design department, this book tops the chart: artistic, full-color photos, eminently usable maps, elevation charts, trail access symbols, and user-friendly layout throughout. If you're planning on doing some hiking on the Continental trail, this is the book to get.



# AORE Leadership Awards



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## The Outdoor Network Leadership Award

*“For Excellence in Service to the Outdoor Profession in Facilitating Communication and the Sharing of Resources Between Outdoor Professionals.”*

1991- Jim Rennie

1992- Jim Rogers

1993- Ron Watters

### Jim Rennie Leadership Award

*The Jim Rennie Leadership Award recognizes contributions to AORE which are far beyond the ordinary and which have had significant and lasting impacts on the Association and its mission or professional work or leadership of unusual significance in the field of outdoor recreation and education.*

1996- Dave Secunda, ORCA

1997- Tim Moore, Miami University, OH

1998- Jim Fullerton, Idaho State University

1999- Rob Jones, University of Utah

2000- Greg Lais

### Bill March Student Leadership Award

*The Bill March Student Achievement Award is presented to an individual who makes outstanding contributions to an outdoor recreation and education program while pursuing an undergraduate or graduate degree.*

1996- Russell Parks, Miami University, OH

1997- Brian Wilkinson, University of Utah

1998- No Nominations

1999- Robert Taylor, Clemson University

2000- Tim King, Southwest Texas State

# THE HIDDEN COSTS OF OUTDOOR EDUCATION/RECREATION ACADEMIC TRAINING

Christian Bisson, Ed.D.

**ABSTRACT:** Over the past few decades, the field of outdoor education and recreation has seen a considerable increase in academic training programs. While these programs are serving thousands of aspiring young professionals, the true cost associated with these programs are often hidden. With training costs and required technical personal equipment, studying to become an outdoor educator does not come at a low price. When the average entry level salaries in our field are considerably below the average expected salaries for a baccalaureate degree, we have to question the way we administer our outdoor education/recreation training programs. This paper will reveal the hidden costs of our academic training programs by presenting data collected through a survey of outdoor education/recreation training institutions. The author also offers potential solutions to these financial challenges.

## Statement of the Problem

Course fees are often hidden in many academic programs. From nursing to fine arts, students are required to take classes for which they not only have to pay tuition for credits, but they also have to pay special course fees (a.k.a. lab fees). These financial surcharges are often concealed until class registration, and after a while, become accepted by many students. Outdoor education and recreation majors are not exempt from this reality. On the contrary, most academic training programs in outdoor education and recreation are successful at presenting field based courses because of additional course fees. Due to a lack of or a limited operational budget for transportation, special equipment, federal land permits, or consumable products like food, fuel, and medical supplies, outdoor education and recreation programs have quietly passed the bill on to the students.

In addition, to these hidden costs, one should not forget to add the cost of basic outdoor equipment and technical garments that are often needed to participate in field based classes or to practice newly acquired skills. From a simple pair of wool socks to a three season sleeping bag, personal outdoor equipment quickly increases the cost of studying outdoor education/recreation. Finally, since the industry now requests current first aid certification, students in outdoor education/recreation are often compelled to take a Wilderness First Responder (WFR) course from a certifying body. This certification brings an additional cost that is not often clearly spelled out in college curricula.

Since we know that the average entry level annual salaries in our field for full time employment (\$18,000 - \$21,000)<sup>1</sup> are considerably below the average expected annual

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<sup>1</sup> Data compiled from AEE Job Clearing House, January 1997 through January 1999.

salaries for a baccalaureate degree (\$26,300 - \$32,000)<sup>2</sup>, we have to question the way we administer our outdoor education/recreation training programs. This research looks at the extent of this problem by analyzing three contributing factors: (1) academic programs' additional costs for special course fees, (2) the cost of basic outdoor equipment and technical garments, and (3) the cost for WFR certification.

## **Research Methodology**

### Academic Program Survey

In March 2000, 36 academic institutions were sent a letter explaining the purpose of the study. Each institution was asked to voluntarily provide (1) a copy of the most recent class requirement for students majoring in outdoor education or recreation with an emphasis in outdoor adventure activities, and (2) a copy of a document listing any special course fees associated with the required or potential elective courses.

15 institutions returned the requested information for a return rate of 41.6 %. Of these institutions, 13 were from the United States and two were from Canada. Nine were State or Provincial institutions while 6 were private colleges. The majority (14) of the respondents were 4 year baccalaureate institutions, only one institution was a 2 year preparatory college.

For each institution, a minimum and maximum cost for special course fees was established according to their respective program requirement. An average of course fee cost per credit was then computed for each institution.

### Average Cost of Basic Outdoor Equipment and Technical Garment

For this part of the research, an exhaustive list (111 items) of potential basic outdoor equipment and technical garments was established based upon the researcher's personal experience. The list was distributed to 30 outdoor adventure education majors to determine a list of most needed items. The items receiving at least 51% of the student votes were priced based on an average price from three national US outdoor equipment resale stores (i.e., REI, Campmore, EMS). The total cost of the most needed equipment from the list was then computed.

### Average Cost for WFR Certification

The cost of 12 WFR certification courses were averaged by randomly taking four courses from Wilderness Medicine Institute of NOLS, four courses from Wilderness Medical Associates, and four courses from SOLO for the 1999-2000 academic year.

## **Data**

### Academic Program Survey

Institutions participating in this research were promised confidentiality. Therefore, an identification number – from 1 to 15 – has been allocated to each institution. For each

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<sup>2</sup> Data taken from Recruiting Trends 1998-1999, Michigan State University.

responding institution, a maximum and a minimum additional cost for completing their respective outdoor education or recreation program was calculated. All additional costs came from the summation of lab fees or special course fees. Table 1 presents the maximum and minimum additional costs as well as their respective average cost per credit.

It is interesting to note that only one institution (see #15) does not require additional costs for outdoor skill classes. The respondent indicated that, "Departmental budgets must cover fees for trips and equipment." This type of management seems to be an exception to the common practice in academic outdoor education/recreation training programs.

Maximum and minimum course fees existed for almost half of the responding institutions because their academic program offered required options with occasionally drastic differences in additional course fees. For instance, institution #2 offered the option to either take three outdoor pursuit classes focusing respectively on land, water, and snow at \$30.00 per class, or participate in a Wilderness Education Association course or an Outward Bound course. This last option would obviously bring an additional cost of \$1000 to \$2000. Although more expensive, this type of option is often preferred by students because it offers a more intense experiential approach to skill development.

Figure 1 presents a comparative chart of maximum and minimum additional course fees. While Figure 2 presents a comparative chart of maximum and minimum average cost per credit. In Figure 1, we can see how much additional costs differed throughout the responding institutions. For example, additional costs range greatly from over \$2,500.00 to \$75.00 (not including Institution #15). Even though it seems that some outdoor education/recreation programs are passing the bulk of the cost on to the students, it is important to look at the number of credits obtained through these programs. Figure 2 gives us a better idea of which institution gives you the most for your dollar. For instance, institution #1 charges the students a high additional cost but also offers in return many credits which on average will cost the student only \$38.00 a credit. Comparatively, institution #10 requires only an additional \$500.00, but their cost per credit is twice as much as institution #1 (i.e., \$83.00).

Table 1

Maximum and Minimum Additional Cost<sup>3</sup> and Respective Average Cost per Credit

Institution	Max. Cost	Min. Cost	Max. Average Cost per Credit	Min. Average Cost per Credit
1*	\$2,625	\$2,125	\$38.60	\$37.95
2	\$2,060	\$95	\$171.67	\$7.92
3*	\$1,805	\$1,755	\$36.10	\$35.10
4	\$950	\$880	\$19.39	\$18.72
5*	\$850	\$600	\$106.25	\$85.71
6	\$806	\$602	\$53.73	\$50.17
7*	\$680	\$220	\$45.33	\$18.33
8	\$675	\$675	\$75.00	\$75.00
9	\$670	\$670	\$60.91	\$60.91
10*	\$500	\$480	\$96.00	\$83.33
11*	\$455	\$455	\$65.00	\$65.00
12	\$369	\$369	\$41.00	\$41.00
13	\$214	\$214	\$9.30	\$9.30
14	\$75	\$75	\$8.33	\$8.33
15	\$0	\$0	\$0.00	\$0.00

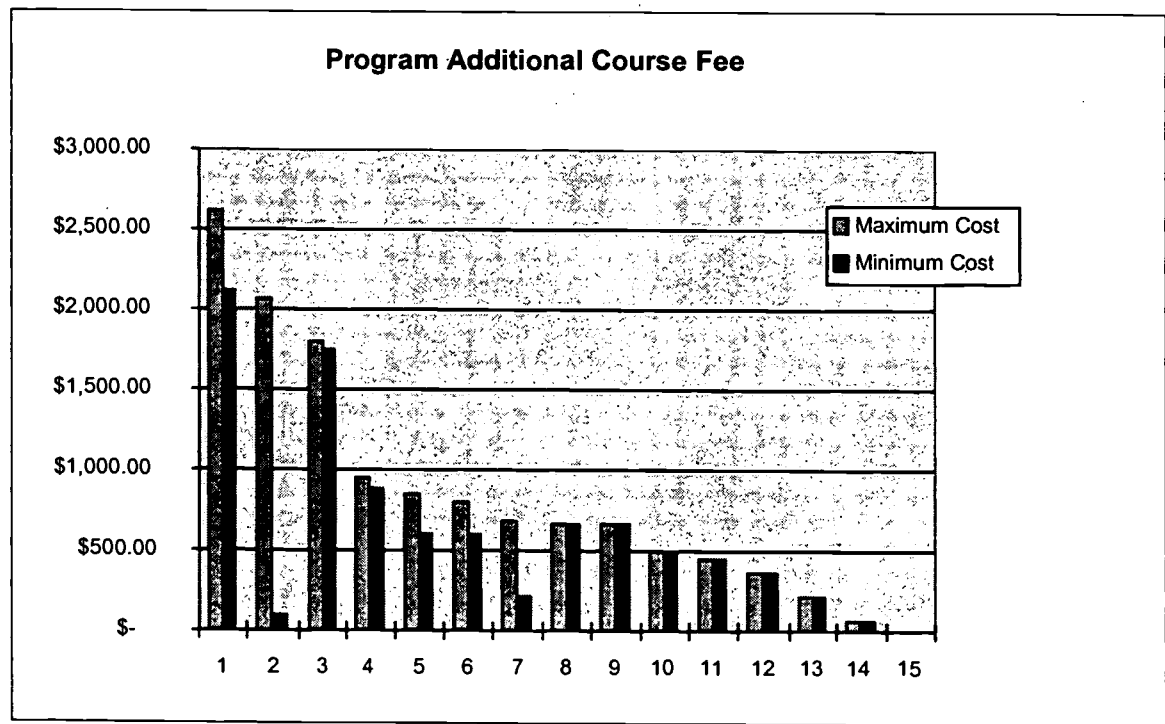


Figure 1. Maximum and Minimum Additional Course Fee.

<sup>3</sup> All costs are presented in US dollars.

\* Private Colleges.



Although these data give us a better picture of the role additional course fees are playing in the academic training of outdoor education and recreation students, it does not provide a complete picture of the financial stress experienced by these students. To get a more accurate financial picture, we must also look at the average cost of basic outdoor equipment and technical garments that these programs often expect students to own or acquire during their academic training.

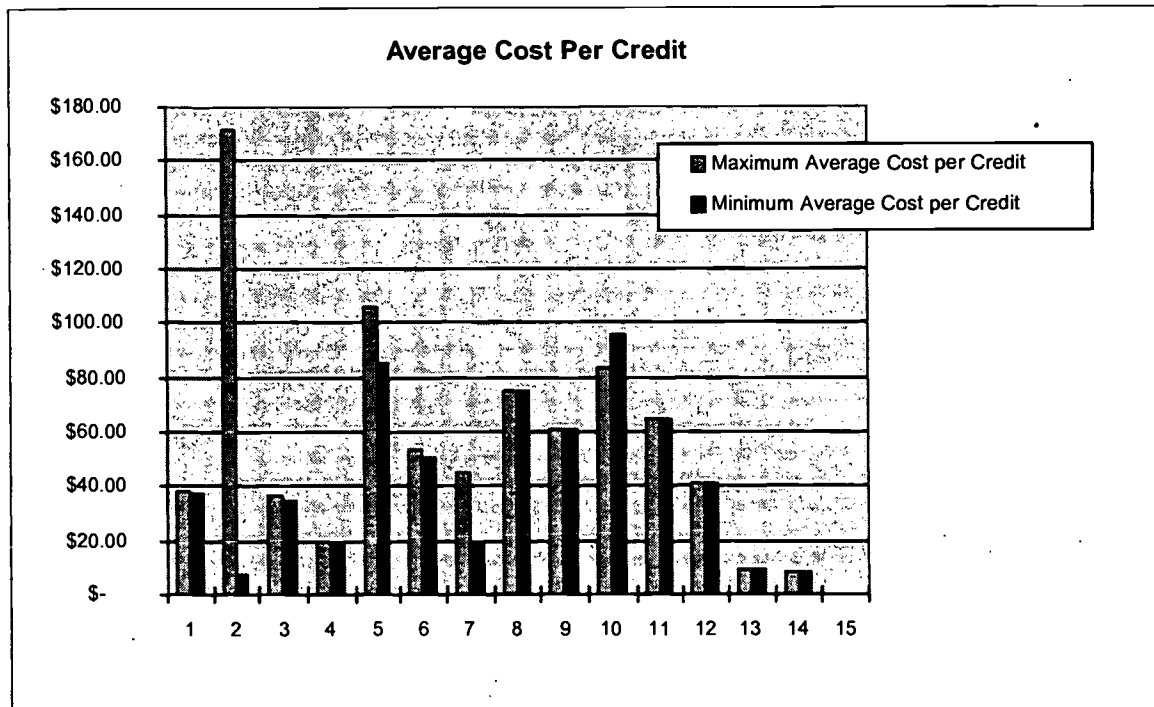


Figure 2. Maximum and Minimum Average Cost per Credit.

#### Average Cost of Basic Outdoor Equipment and Technical Garment

From wool socks to a personal first aid kit, 26 pieces of outdoor equipment or personal technical garments (see Table 2) were selected by more than 50% of students who responded to the "Most Needed Basic Outdoor Equipment and Technical Garment Survey."

The total cost adds up to \$1795.45. This is a conservative figure that does not take into account peripheral cost such as sale taxes or shipping charges. One could argue that a young professional could easily spend \$2000.00 to acquire all the basic equipment and garments needed to go camping or to practice classic outdoor activities such as rock climbing, canoeing, or cross-country skiing.

Although the 26 items selected as "most needed" by the student sample represent only 23 % of the 111 items mentioned in the survey, it is important to notice that most of the 26 items were owned (see percentage of ownership in Table 2) by the respondents (78% on average). This finding implies that students in outdoor education or recreation programs are already accumulating essential and expensive pieces of equipment or technical garments.



Adding this hidden price tag to the expenses generated by special course fees brings up a new perspective on the true cost of becoming an outdoor educator. However, we still need to add another hidden cost to this already expensive endeavor. Wilderness First Responder (WFR) certifications are increasingly perceived to be a basic requirement for hiring and therefore should be added to the total cost of becoming an outdoor educator.

Table 2  
Most Needed Basic Outdoor Equipment and Garment

	<u>Items</u>	<u>Average Price</u>	<u>Percentage of Ownership</u>
1.	Wool Socks (4 pairs)	43.92	96%
2.	Hiking Boots	191.33	96%
3.	Light Weight Bottom Underwear	21.65	82%
4.	Light Weight Top Underwear	22.65	82%
5.	Medium Weight Bottom Underwear	35.33	75%
6.	Medium Weight Top Underwear	35.33	75%
7.	Heavy Weight Pile/Fleece Jacket	118.00	85%
8.	Wind Jacket	175.33	72%
9.	Wind Pants	43.65	75%
10.	Wool/Fleece Hat	22.65	89%
11.	Biking Helmet	48.32	60%
12.	Quick Dry Shorts	29.65	81%
13.	Day Pack (2000 - 3500 cu. in.)	77.65	96%
14.	Backpack (6000 - 7500 cu. in.)	348.38	85%
15.	3 Season Sleeping Bag	168.00	70%
16.	Closed Cell Foam Pad	19.93	66%
17.	Camping Stove	66.95	60%
18.	Water Bottle	6.48	100%
19.	Water Filter	107.38	60%
20.	Compass	15.94	81%
21.	Pocket Knife	18.65	100%
22.	Personal Floatation Device	48.31	60%
23.	Carabiners (6)	33.72	40%
24.	Sun Glasses	45.16	92%
25.	Headlamp	33.15	88%
26.	Personal First Aid Kit	17.94	81%
	<b>Total</b> \$1795.45		<b>78%</b>

Average Cost for WFR Certification

Although some academic programs offer WFR as part of their required curriculum in outdoor education/recreation, it is often left to the student to pay for the additional cost for certification. The cost of a WFR certification from well known wilderness first aid training schools such as Wilderness Medicine Institute of NOLS, Wilderness Medical Associates, and SOLO range from \$450.00 to \$750.00. The considerable difference in cost can be mainly explained by the variation in overhead cost specific to each organization hosting the WFR certification.

Hence, on average, one can expect to pay around \$570.00 to participate in a WFR certification course.

## **Implications**

From this study, we can entertain three basic assumptions. 1) The cost of studying outdoor education/recreation in an academic institution includes a total<sup>4</sup> hidden cost that can vary from \$2370.00 to \$5000.00. 2) It is expected that outdoor education and recreation students invest in personal and technical equipment and garments prior to or during their academic training. 3) Personal skill certification such as WFR is required by most employers and therefore must be acquired and paid by students in outdoor education/recreation.

When we look at the different sources contributing to increasing the hidden costs of studying outdoor education/recreation, one could argue that personal equipment and technical garments are not only an essential expenditure, but also a professional investment in work tools. Like carpenters, outdoor educators must invest in some personal equipment or technical garments to practice their profession. Furthermore, one could argue that most often, this equipment and these garments will be used for personal recreational activities. Hence, the additional cost created by equipment and garments is self-imposed. It is the nature of our profession, a part of our culture.

Nevertheless, whether one embraces the purchase of personal equipment and garments as a positive necessity to becoming an outdoor educator, we cannot deny the fact that a financial burden is added to all students majoring in our field. If we compare the experience of students in outdoor education/recreation to students in physical education or urban recreation, we can easily estimate that outdoor education or recreation is more costly than other related fields. For example, students in physical education are not expected to buy their own basketballs or even less their own basketball hoops.

It could also be argued that the adoption of personal certification in wilderness first aid was an essential and positive development in our profession. Today one can hardly imagine letting oneself or one's child be led in the wilderness by someone with no knowledge or skills in wilderness first aid. Therefore, one could say that the cost associated with WFR certification is a logical and ethical requirement for all professional outdoor educators. Yet, it is potentially an additional cost to all students in outdoor education and recreation that none can deny.

Finally, one could argue that because most outdoor skill classes are field based they require transportation, food, special permits, and the rental of outdoor equipment, which obviously brings additional expenses. Everyone understands that any expedition encumbers some expenses. However, in most academic institutions, the additional costs

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<sup>4</sup> Includes maximum additional course fees, equipment & garment costs, WFR cost.

engendered by travel, food, special permits, and rental of equipment is obviously passed on directly to the students.

But why are we passing the bill to our students? To answer this question, we have to look at our origins. Historically, academic outdoor education and recreation programs have been developed by isolated individuals who shared a common vision of offering academic training in outdoor education or recreation. But without a solid theoretical foundation and with a misunderstood pedagogical approach, it was difficult for these pioneers to request additional funds to “go camping” as it was often perceived by their administrations and colleagues (true education was only perceived to be taking place on campus). Field based experiences or wilderness field trips were often perceived as extracurricular activities. Hence, students participating in these courses had to cover the additional expenses. One should not forget that it is only through the perseverance of the pioneering work of these educators that outdoor education/recreation was able to grow into healthy and mature majors and departments.

However, the financial strategies adopted to establish these pioneering programs are still prevalent today. Even the oldest and best established outdoor education and recreation programs are still perceiving field based courses as activities outside the traditional academic program. This perception requires us to create and offer field based courses with no departmental budget to cover transportation or the rental of special equipment. Ironically, we have become victims of our own history. We have created a precedent, which implies that outdoor field experiences are not part of a traditional academic training. In brief, we are still suffering from what I call “academic insecurity.” As long as we perceive our educational approaches to be alternative or nontraditional pedagogy, we will continue to bill our students for an educational approach that is fundamental to the development of young professionals in our field.

### **Potential Solutions**

I believe two solutions can be proposed. First, we can entertain solutions that involve seeking external funding to increase, or create, departmental budgets that will allow the financing of outdoor field based courses or skill classes. External funding could include state, federal, or private grants. It could also include seeking sponsorship from outdoor equipment companies, outdoor retail stores, or outdoor “dot com” companies. Obviously, these solutions might have a short-term existence in nature as well as raise some ethical issues about involving academic training with money from the private sector.

Another solution, with long-term consequences, would involve a paradigm shift in our institutional administration. It would involve lobbying to get our field based experience recognized as an integral part of our academic services. We would need to replace the generalized extracurricular “camping trip” perception with an understanding that outdoor field based experiences are simply an extension of our academic classrooms.

Operating budgets are mostly based upon tuition incomes. This money is used to pay for all costs associated with a safe and functional classroom environment, from heating and lights to maintenance and clean up. When a class leaves campus to teach rock climbing at a nearby bluff, no campus classroom or utilities are being used. In fact, academic institutions are saving money when we are off campus. I believe that we could make an argument to acknowledge that the money allocated to campus classroom services should be reallocated to off campus transportation. Few institutions are already benefiting from this free use of vans and buses for regional travel. One institution surveyed in this study offers free transportation up to 100 miles.

A similar argument could be made for purchasing special or group equipment. Like the microscopes and sampling containers in the biology labs, the tents and canoes should be provided at no cost to the outdoor education/recreation students. Equipment rentals should be available on an individual basis only. Once transportation and group equipment are being provided by the institutions, the students additional course fee might only be needed to cover consumables such as food.

Such a paradigm shift would be challenging for our administrators. But, with careful argument, it might be possible to convince our peers that what we are doing in the field is as much academic as what we are doing in the classroom.

Yet, there is a potential risk that comes with having a departmental budget. The budget could dictate what type of expedition a program could offer by limiting how far a course could go or what type of activities a wilderness expedition could do. Departmental budgets are also susceptible to generalized budgetary cuts or freezes.

## **Conclusion**

Like few other majors, outdoor education and recreation students are often asked to pay additional course fees to pursue their degree. This research has shown that this cost could vary from over \$2500.00 to less than \$100.00. Obviously the difference between these additional costs represents a difference in how field-oriented these programs are.

Nevertheless, studying outdoor education/recreation in an academic program means spending money on course fees, personal outdoor equipment/technical garments, and first aid certification. This study suggests that this overall cost could vary from \$5000.00 to \$2370.00. An additional cost that seems excessive for majors who cannot expect to find a full time entry level job above the national average entry level salary.

To reduce these costs, short term and long term solutions are possible, but both options include ethical or programming consequences. In any case, it is essential that leaders in outdoor education and recreation programs take a careful look at the true cost of becoming an outdoor education/recreation specialist, and work towards reducing these costs.

## **Biographical Sketch**

Dr. Christian Bisson has been involved in outdoor education since 1986. He teaches Adventure Education at Northland College and works seasonally for NOLS. Christian has presented workshops at various AEE International and Regional Conferences and received the 1997 AEE Outstanding Experiential Teacher of the Year Award.

### **For further information, contact:**

Christian Bisson, ED.D.  
Northland College  
Department of Outdoor Education  
1411 Ellis Ave.  
Ashland, WI 54806  
715-682-1324 (Work)  
715-682-1802 (Fax)  
E-mail: [cbisson@northland.edu](mailto:cbisson@northland.edu)

## **THE SERVICE-LEARNING CONCEPT: SERVICE-LEARNING IN THE NATIONAL PARKS**

**Dr. Tom Coates**

**ABSTRACT:** As demands on our national parks increase and resources decrease, park managers are being forced to consider new options in order to meet the needs of park visitors. East Tennessee State University provides a unique method of assisting these park managers in extending their limited resources by creating service-learning experiences for college students who complete specific service projects for the parks while simultaneously being engaged in the completion of educational course objectives. The educational concept is known as service learning and combines the opportunity to experience civic responsibility through service with the unique opportunity to learn from involvement with the National Park Service.

As demands on our national parks increase and the financial resources available for their support continue to be inadequate to meet the challenge of these demands, park managers are faced with difficult decisions. Many of our national parks are experiencing non-increasing budgets that have resulted in reduction of resources necessary for adequate park operations and curtailment of visitor services. In response to the reality of tough times, some national parks have developed programs that identify volunteers in the parks (VIP) as sources of assistance for regular park service personnel as they carry out the mission of the National Park Service. Borrowing from the VIP concept and tapping into the availability of college students as a possible work force in the parks, East Tennessee State University in Johnson City, Tennessee, has developed a unique educational program which takes students into the national parks to serve and learn. The central focus of this experience is service learning in which the participants serve to learn and learn to serve.

Formed in 1979 as a study-tour to selected national parks in the Rocky Mountain region, Rocky Mountain Experience has evolved into a service-learning experience, which seeks to actively involve students in the daily operation of the national parks. At the same time students are working toward specific educational objectives that draw upon these service experiences. In order for this experience to be service learning in the purest sense, the service provided must not only be of value to the served but also to the server. To assure that this is the case, the parks participating in this program are asked to identify projects for the Rocky Mountain Experience participants to work during their stay in the parks. The end result is work accomplished on projects of importance to the parks (the served), as well as valuable educational experiences provided through the service experience to the participant (the servers). This service-learning experience becomes complete when the program participants are asked to draw from their experiences in the parks during processing sessions. Such sessions are essential to the service-learning concept as they focus participants on what they have learned through the service experience and extend this knowledge in new directions. National parks presently involved in this program include Yellowstone National Park and Grand Teton National Park in Wyoming.



Planning for such an experience is a lengthy and detailed process. Rocky Mountain Experience service-learning trips run from three to six weeks in length, cover from 5,000 to 6,000 miles, and accommodate from twelve (12) to sixteen (16) participants. During time in the field, the group camps in the parks and along the way, prepares all meals, and manages daily living activities. Typically the entire cycle, from the beginning of the planning process until the experience is completed and final evaluations done, encompasses ten (10) months. Early planning involves contact with the selected national parks, development of the basic trip schedule and budget, and selection of topics for emphasis as part of the educational component of the experience. Throughout this entire cycle, fiscal management is a major concern since the only funds for support of this experience are the fees paid by the participants. As the trip schedule is developed in more detail, equipment needs are identified, menus planned, transportation secured, organizational meetings held with participants, and reservations made as needed. Just prior to leaving, all equipment and food are inventoried and loaded. On the road, the day to day activities involve processing the service-learning experiences, preparing meals, transporting participants, arranging work schedules, dealing with the occasional "personal emergency", maintaining the schedule, and managing equipment. Risk management is an important concern while in the field and all possible precautions are taken to insure the safety and well being of every participant. Upon completion of a trip, the unpacking, cleaning, and storage of equipment occurs, as well as a final processing session and program evaluation.

After all is said and done, the major question for consideration is; does this service learning experience work? Response to this question comes in two parts, the service and the learning. The service value is easier to define since it may be expressed in numerical terms. To date students involved in Rocky Mountain Experience have contributed more than 7600 service hours to our national parks. In Yellowstone National Park, two (2) miles of roadside have been cleared, Yellowstone Lake shore line and campsite cleanups have been conducted, two (2) Fishing Bridge campgrounds removed, twenty-four (24) units of "jack-leg" fence constructed, three (3) shingle roofs treated, and Fishing Bridge stained. Projects completed in Grand Teton National Park include thirty-one (31) tent pads constructed, twenty-three (23) bear boxes installed, 150-175 campsite signs painted, forty (40) yards of "jack-leg" fence constructed, two (2) fire rings installed and eighty-four (84) cleaned, six (6) backcountry campsites cleaned and two (2) outhouses removed, and eight (8) shooting range stands constructed. All of these assignments represent projects the parks would like to have completed but would probably have been unable to accomplish without additional support. The participants of Rocky Mountain Experience provided that additional support.

As for the learning component of the service-learning experience, it is safe to say that the Rocky Mountain Experience participants will never look at a national park the same way again. In addition to coming away from the experience with better developed outdoor living skills, knowledge of flora and fauna of the Rocky Mountains, greater understanding of the geology of the region, and improved people skills, participants also come away with a greater sense of understanding and respect for our national parks. Through their service in the parks, participants gain insight into what is involved in

managing a national park. Participants grow beyond the general tourist concept of a national park beings just fantastic vistas and majestic animals to becoming an advocate with a better-than-average understanding of park management problems, the impact of politics on park operations, and the pressures of limited supply and increasing demands. It is not unusual to hear program participants refer to fellow travelers in the parks as "tourists" implying a greater awareness of major issues impacting the parks, which is often lacking in the "windshielding" vacationer.

Each year, Rocky Mountain Experience participants are invited to return to the national parks for more service projects. Each year, as projects are completed, heartfelt appreciation is expressed as plans are made for the next season. And, each year, college students once again pay their way from East Tennessee State University to the Rocky Mountains to serve and learn in the national parks. All involved, both parks and students are benefiting from this unique program as participants serve to learn and learn to serve.

### **Service-Learning Projects Completed 1992-2000**

#### 1992

##### WIND CAVE NATIONAL PARK (2 days, 15 participants: 240 service hours)

- 1.5 acres cleared of pine seedlings and undergrowth.
- 1.5 - 2 miles of park boundary cleared; 40 feet wide area.

##### YELLOWSTONE NATIONAL PARK (3 days, 15 participants: 360 service hours)

- Fishing Bridge Campground removal project; more than 150 sites cleared.
- Yellowstone Lake north shore clean up.
- Roadside clearing; 2 miles, both sides.

##### GRAND TETON NATIONAL PARK (3 days, 15 participants: 360 service hours)

- 8 tent pads built.
- 10 bear boxes installed.
- 150 -175 campsite signs painted.

#### 1993

##### WIND CAVE NATIONAL PARK (2 days, 16 participants: 256 service hours)

- 3000 visitors contacted; cave tours, nature walks, visitors' center front desk.
- 2.5 - 3 acres cleared of pine seedlings and undergrowth.

##### YELLOWSTONE NATIONAL PARK (4 days, 16 participants: 512 service hours)

- 3 building rooftops treated.



24 "jack leg" fence units built.  
Yellowstone Lake north shore clean up.  
Fishing Bridge Campground clean up continued; contractors  
camp removed.

GRAND TETON NATIONAL PARK (4 days, 16 participants: 512 service hours)

12 tent pads built.  
2 fire rings installed and 84 cleared.  
13 bear boxes installed.  
40 yards of "jack leg" fence built.  
6 backcountry campsites cleared and 2 outhouses removed.  
8 shooting range stands constructed.

1994

WIND CAVE NATIONAL PARK (2 days, 15 participants: 240 service hours)

Assisted with 68 cave tours.  
Assisted with 8 Discovery Programs.  
Assisted with 1 nature hike.  
Participated in campground roving.  
Approximately 6000 visitor contacts made.

YELLOWSTONE NATIONAL PARK (3 days, 15 participants: 360 service hours)

Stained Fishing Bridge: 1 ½ days and 64 gallons of stain.  
Yellowstone Lake shore campsite clean up: 8 campsites.

GRAND TETON NATIONAL PARK (3 days, 15 participants: 360 service hours)

11 tent pads built.

1995

WIND CAVE NATIONAL PARK (2 days, 13 participants: 208 service hours)

Assisted with 16 cave tours.  
Piled 22 piles of limbs as part of fire management program.  
Approximately 2500 visitor contacts.

YELLOWSTONE NATIONAL PARK (3 days, 13 participants: 312 service hours)

Cleaned and sealed shingle roof of Fishing Bridge Visitor  
Center.

GRAND TETON NATIONAL PARK (3 days, 13 participants: 312 service hours)

22 tent pads restored.  
9 additional tent pads prepared for restoration.  
15 fire rings removed.  
5 barrier logs installed.

1997

YELLOWSTONE NATIONAL PARK (4 days, 12 participants: 384 service hours)

1/4 mile trail restoration.  
86 yards of trail restoration; asphalt removed and new asphalt laid.  
Removal of observation deck at Mud Volcano.  
8, 20-foot walkway units constructed and installed.

GRAND TETON NATIONAL PARK (4 days, 12 participants: 384 services hours)

11 tent pads constructed.  
2 group campsite benches constructed.  
Approximately 100 campsite signs painted.  
Restoration work on Swan Lake Trail.  
Approximately 100 yards of trail restoration.  
Jackson Lake shore clean up.  
Shore restoration at Little Grassy Island.  
Cleaned and detailed National Park Service boats.  
Tree limb removal in Colter Bay Campground.  
Campsite clean up on Elk Island.

1998

YELLOWSTONE NATIONAL PARK (4 days, 15 participants: 512 services hours)

Mud Volcano Interpretative Trail restoration including construction of wooden trail borders, hauling and packing asphalt, and backfilling along trail.  
Carried walkway timbers to construction sites in Mud Volcano Interpretative Trail area for construction of walkways and stairs.  
Trail Creek corral project including removal of old corral and construction of new corral.

GRAND TETON NATIONAL PARK (4 days, 15 participants: 512 services hours)

55 picnic tables stained, 2 coats of stain on each.  
6 tent pads constructed.  
9 campsite benches built.

Dock repairs at Leeks Marina.  
Jackson Lake shore clean-up: 2 truck loads of debris removed.  
Cleaned and detailed National Park Service boat.

1999

YELLOWSTONE NATIONAL PARK (4 days, 11 participants: 352 service hours)

Dismantled wolf reintroduction pen in Fishing Bridge area  
and positioned for removal by helicopter.  
Began dismantling wolf reintroduction pen at Trail Creek and  
removed fence sections, by boat, to Bridge Bay Marina.  
Oiled two boat docks located at back country campsites on  
Yellowstone Lake.  
Painted one backcountry outhouse.  
Removed two dismantled backcountry outhouses.  
Began work on two new boat docks.  
Cleared part of Trail Creek backcountry trail.  
Cleaned backcountry campsites and outhouses.

GRAND TETON NATIONAL PARK (4 days, 11 participants: 352 service hours)

8 tent pads completed with work begun on a 9th tent pad.  
24 new picnic tables assembled, cleaned and delivered to  
campsites.  
40 additional picnic tables removed and/or relocated at  
campground sites.  
Approximately 55 campsite water sites painted and campsite  
number posts touched up with paint.  
Cut and hauled wood for campsite benches and began work  
on benches.  
Cleaned campsite fire pits at Colter Bay Campground.

2000

YELLOWSTONE NATIONAL PARK (4 days, 13 participants: 416 service hours)

Dug trench for installation of new audio cable at Fishing Bridge  
Amphitheater.  
Bridge Bay Marina Dock Project:  
1. Installed bumper rails on docks.  
2. Installed cleats on docks.  
3. Styrofoam removal and clean up.  
Removed old bumper rails from dock on lake

GRAND TETON NATIONAL PARK (4 days, 13 participants: 416 service hours)

Work on Pelican Bay Trail; approximately 1/2 mile.  
Painted approximately 30 picnic tables.  
Installed 6 fire rings at Signal Mountain Campground.  
Painted 20 new campsite posts.  
Replaced 17 campsite post.  
Trash clean up on A-H loops in Colter Bay Campground.  
Re-graveled campground host's area.  
Made changes in fire signs on picnic tables.

ADDITIONAL SERVICE PROJECTS COMPLETED FOR THE NATIONAL PARK SERVICE

GREAT SMOKY MOUNTAINS NATIONAL PARK (1 day, 18 participants: 144 service hours)

80 yards of "post and rail" fence built and old fence removed.  
90 yards of "zigzag" rail fence built.  
50 yards of old split rail fence removed. (November, 1996)

CARL SANDBURG NATIONAL HISTORIC SITE (1 day, 8 participants: 64 service hours)

Amphitheater project: removal of old and construction of new amphitheater.  
(October, 1997)

GREAT SMOKY MOUNTAINS NATIONAL PARK (1 day, 14 participants: 84 service hours)

Chimneys Picnic Area clean-up. (April, 1999)

TOTAL SERVICE HOURS: 7652

Wind Cave National Park: 944  
Yellowstone National Park: 3208  
Grand Teton National Park: 3208  
Great Smoky Mountains National Park: 228  
Carl Sandburg National Historic Site: 64

## Presentation Notes

<p style="text-align: center;"><b>SERVICE/LEARNING</b></p> <ul style="list-style-type: none"><li>• What is service-learning?</li><li>• How does service-learning relate to educational experiences?</li><li>• How can service-learning be used as a teaching methodology?</li></ul>	
<p style="text-align: center;"><b>ROCKY MOUNTAIN EXPERIENCE: TWO-FOLD PURPOSE</b></p> <ul style="list-style-type: none"><li>• To provide service for selected national park service areas.</li><li>• To provide a unique educational experience through travel to and work in selected national park service areas.</li></ul>	
<p style="text-align: center;"><b>ROCKY MOUNTAIN EXPERIENCE: THE COURSE</b></p> <ul style="list-style-type: none"><li>• Developing course objectives.</li><li>• Developing course content.</li><li>• Developing evaluative criteria.</li></ul>	
<p style="text-align: center;"><b>SERVICE PROJECTS NUMBERS</b></p> <ul style="list-style-type: none"><li>• 11,500 visitor contacts.</li><li>• 87 tent pads built or restored.</li><li>• 23 bear boxes installed.</li><li>• 6.5 miles of trail constructed.</li><li>• 136 yards of fence built.</li><li>• 75 cave tours conducted.</li><li>• 300+ campground signs painted.</li><li>• 140 picnic tables constructed.</li><li>• Fishing Bridge stained.</li><li>• Fishing Bridge Visitor Center roof.</li><li>• 1.5 wolf pens removed.</li></ul>	

<ul style="list-style-type: none"> <li>• 7600+ hours of service to the NPS.</li> <li>• Approximately \$28,000 in service to the NPS.</li> </ul>	
<p style="text-align: center;"><b>WHAT HAS BEEN LEARNED: ACADEMICS</b></p> <ul style="list-style-type: none"> <li>• About the NPS.</li> <li>• Other federal land management agencies.</li> <li>• Management policies of the NPS.</li> <li>• Flora and fauna of the Rocky Mountains.</li> <li>• Geology of the national parks visited.</li> <li>• History of the American West.</li> <li>• Controversy in the national parks.</li> <li>• Environmental issues threatening the national parks.</li> <li>• Careers and job opportunities in the national parks.</li> <li>• Environmental awareness.</li> <li>• Outdoor living skills.</li> </ul>	
<p style="text-align: center;"><b>WHAT HAS BEEN LEARNED: SKILLS</b></p> <ul style="list-style-type: none"> <li>• Use of hand tools.</li> <li>• Tent pad construction.</li> <li>• Trail construction.</li> <li>• How to construct a picnic table.</li> <li>• How to install a bear box.</li> <li>• How to organize a work project.</li> <li>• How to organize a work crew.</li> <li>• How to work with and lead others.</li> </ul>	
<p style="text-align: center;"><b>WHAT HAS BEEN LEARNED: SELF</b></p> <ul style="list-style-type: none"> <li>• Self discipline.</li> <li>• Self respect.</li> <li>• Empowerment.</li> <li>• Respect for others.</li> <li>• Responsibility.</li> <li>• Leadership.</li> <li>• Followership.</li> <li>• Decision-making.</li> </ul>	

<ul style="list-style-type: none"> <li>• Sense of community.</li> <li>• Value of service.</li> <li>• Organizational skills.</li> <li>• Independence.</li> <li>• Dependence.</li> <li>• Team work/cooperation.</li> </ul>	
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**Biographical Sketch:**

**Dr. Tom Coates** has taught at the college and university level in the areas of Physical Education and Recreation for the past 25 years. During that time he has taught a variety of outdoor recreational activities and for the past 20 years has conducted study tours to national parks in the Rocky Mountain region. An outgrowth of these study tours has been the development of a unique service-learning course that involves students in service projects while learning in the national parks. To date, students involved in this course have contributed more than 5000 hours of volunteer service in Yellowstone and Grand Teton National Parks.

Tom has a Doctoral Degree in Physical Education and Recreation from Middle Tennessee State University, and a Masters Degree in Parks, Recreation and Tourism Management from Clemson University.

**For more information, contact:**

Dr. Tom Coates  
Assistant Professor  
East Tennessee State University  
PEXS Department  
Box 70654  
Johnson City, TN 37614  
Fax: (423) 439-7560  
Email: [coates@etsu.edu](mailto:coates@etsu.edu)

# **COLUMBUS OUTDOOR PURSUITS: A MODEL STRUCTURE FOR VOLUNTEER BASED OUTDOOR PURSUITS PROGRAMS**

**Ann E. Gerckens**

**ABSTRACT:** A brief look at the structure of a successful volunteer based outdoor pursuits programs including the responsibilities of participants, trip leaders, Activity Chairs, Executive Board and Officers. A few of the organization operating guidelines are included as an appendix.

While the nature of volunteer based organizations naturally leans towards chaos, some structure is necessary in order to ensure that programs occur, bills get paid, and to empower volunteers and facilitate success. The following structure is that of Columbus Outdoor Pursuits, a central Ohio organization with 63 years of volunteer experience.

## **Mission Statement:**

Columbus Outdoor Pursuits (COP) is a 501(c)(3) organization formed to help all people gain a greater understanding of the world by providing educational and recreational opportunities while living and traveling simply in the spirit of friendship.

## **Members**

Most of our three thousand members reside in the Central Ohio area. We do have members living further away, particularly those interested in the boating and backpacking activities. Two hundred members live out of state. Most of these are former "Columbusites" who like to keep in touch with COP. A few joined to take advantage of the membership discount on longer trips. Some want to continue their support, or come to Columbus often enough that membership is worthwhile to them.

COP members are responsible for electing the Board and choosing whether or not to participate in trips, or volunteer. As trip participants, we expect that members will behave in a safe, courteous manner and do their best to contribute to the group's physical and emotional welfare. Participants are expected to accept responsibility for their safety and whereabouts. They are also expected to sign the liability release and to follow COP safety policies.

## **Trip Leaders**

COP trip leaders have many responsibilities. Prior to the trip they are responsible for the trips logistic and safety plans and are expected to plan the use of available vehicles to ensure efficiency in terms of mileage, capacity and safety. Leaders are expected to screen potential participants for possible health and safety issues including ill health and skills inadequate to the level of the trip.



On the trip, trip leaders are responsible for the physical and emotional well being of the group and for carrying out the safety policies of that activity. They are expected to educate participants whose skills or interpersonal interactions are not up to par. All leaders are required to have first aid and rescue skills appropriate to the activity, or to make sure someone with those skills is on the trip.

Bureaucracy intrudes. Trip leaders are required to obtain the Activity Chair's endorsement for the trip in advance. They are also responsible for filing a newsletter schedule item before the deadline for the issue in which they want the trip to be listed. For events that will run through the COP books, they also need to file a budget request. At the start of the trip, leaders are expected to obtain releases and emergency numbers, plus rental equipment and non-member fees. Should an incident occur during the trip, they are expected to handle the problem and ensure the safety of the group, and to document the situation with an incident report. After the trip, the leader follows up on incidents, notifies the COP Risk Manager and files a report. Trip reports must be returned to the office and any collected fees deposited within one month of the end of the trip.

**There are a few requirements for being a COP leader, including that the person:**

- Be a member of COP
- Support the mission of COP
- Read the Activity Leader Manual
- Have the appropriate skill level for the activity or provide someone who does
- Have a signed Liability Release from each tripper
- Be trained in first aid to the degree appropriate to the activity or have someone on the trip that is trained.
- Use the Incident Report Form when needed
- Has attended Leadership Training (if the trip is more than 4 days), unless exempted by the Board (Trip Leadership Manual p. 2).

With all these responsibilities come a few rights. A trip leader has the right to be treated with respect by the trip participants, other trip leaders, COP members and the Board. A trip leader also has the right to exclude a person if the leader feels that, from past experience, that person would constitute a safety hazard or would diminish enjoyment of the trip. The leader should inform the rejected person of the reason for the rejection, thereby allowing that person the opportunity to fix their problem.

### **Support**

COP holds Leadership Training classes at least once a year. These classes are actually more about trip administration than actual leadership, but they do give trip leaders the information they need to obtain permission to run a COP trip, publicize that trip in the newsletter, plan a safe, fun trip, and manage the risks of trip leadership. All Activity Chairs are authorized to give a one-on-one Leadership Training to prospective leaders if needed. A COP Trip Leadership Manual is provided to all leaders. This manual includes a list of requirements for trip leading, plus suggestions. The Activity Safety policies are

laid out here, as is the COP Risk Management plan. Liability waivers, incident reports and incident follow up forms are included so the leader can photocopy as needed. Information about paperwork and a list of income/expense account numbers is also included. Activity Chairs and experienced leaders are willing to help out new leaders with logistics, planning and advice about actual leadership issues.

COP tries to recruit volunteers to provide training in first aid and rescue. Several members are certified Red Cross Instructors and provide basic first aid and CPR training to members at cost. COP policy is to subsidize training costs for volunteers willing to become instructors. This policy extends to volunteers taking river rescue, rock rescue and other special skills. For many activities, basic first aid is not adequate. Wilderness First Aid has been offered the past seven years. This program was expanded to Advanced Wilderness First Aid in 2000, and will include a weekend series for Wilderness First Responder in 2001.

### **Free Rein**

Within this structure, trip leaders have freedom to choose what kind of trip they want to lead. With some limitations (the insurance company would break out in hives if a COP trip went to climb Everest, and won't cover hang gliding or skydiving) trip leaders are free to go where they want to go, do what they want to do. Want to go rafting on the Nolichucky during your backpack trip? Have a qualified rafting trip leader on the trip, or hire a reliable outfitter. Want to learn to use an ice ax while you are in Oregon? Hire instructors. Just don't forget to check their credentials. Think we need wilderness first aid skills but there isn't a local instructor? Hire SOLO and fly them in. As long as trip leaders are thinking of the risks and making plans accordingly they could do just about any outdoor activity.

### **Activity Chairs**

Trip leaders are organized by, and report to the Activity Chair. These volunteers have full responsibility for the administration of the respective activity or project. They provide program administration in compliance with both COP Executive Board and Program Safety and Procedural Policies. They are the voice of their activities at the Board level, participating as voting members of the Board. Activity Chairs are recommended by members, participating in the activity, to the Board for appointment to the position.

Recruitment of trip leaders usually falls to the Activity Chairs who also approve trip leaders for all trips in their Programs. They are responsible for overseeing the maintenance of first aid certification and rescue skills among the Program leadership contingent. They also are responsible for ensuring that the activity has competent leaders, safety instruction at outings, adequate schools and an activity program that will accommodate the number of members wishing to take part. They spend a lot of time on the phone!

The everyday operation of their activity and the submission of budgets are under the direct control of the Activity Chair. The Treasurer and Bookkeeper are not supposed to

issue funds for the activity without a pay order signed by the Activity Chair. As part of their fiscal duties, they oversee the purchase, maintenance, storage, repair and replacement of the Programs equipment. For some programs, like Bicycling, this doesn't amount to much. The Boating Program, on the other hand, owns so much equipment that it is necessary to recruit a volunteer just to handle the equipment.

The monthly membership meeting assigned to an activity is conducted by that Activity's Chair, including publicity about the meeting. This person also is expected to organize an annual planning meeting with current and potential leaders to map out their program plans for the year.

## **The Board**

Activity Chairs are members of the Executive Board (The Board), which also includes sixteen elected members. The Board meets the first Thursday night of the month, December through October. In November, they spend the entire first weekend at a retreat

On a monthly basis, The Board approves leaders of extended trips, and approves and monitors the finances of the organization. The buck stops here on fiduciary responsibility.

On an "as needed basis", The Board approves the fees and policies for all COP activities and programs, approves activity safety policies and sets the dates and subjects of the monthly activity meetings. It also establishes, approves, implements and periodically reviews policies.

## **Officers**

COP does not have an Executive Director. The Board President is the Chief Executive Officer and directs the organization's affairs. This volunteer is responsible for appointing committees, making assignments to board members, supervising COP employees and reporting to the board all interim actions between Board meetings. The President is also the official spokesperson to the public, though that task is usually delegated to the Activity Chair of the activity in question.

The **Vice President** assists the President and presides over meetings when the President is absent. If the President vacates that position mid-term, the Vice President becomes the President. COP has found that it is very important for the Vice President to have the skills necessary to be President.

The **Treasurer** is the custodian of the organization's funds and is responsible for keeping accurate records of all sources and expenditures, and for investing the funds in a fiscally conservative manner. One of the challenges for the Treasurer is explaining the monthly income/expense statements and balance sheets to the board. COP has found it necessary to have several people authorized to sign checks. The Treasurer, President, Vice President, Secretary and Director of the Great Ohio Bicycle Adventure are all authorized. It is preferred that the person signing the check not be the person who signed the pay order, but there are times when only one signer is available and circumstances do not

allow for a delay. Any check of \$2000 or more needs two signatures. Occasionally, a check needs to wait because there are not two authorized signers in town!

The **Secretary** prepares and keeps the minutes and corporate records of the organization. This volunteer is also responsible for keeping an up to date contact list of Board members

Another important position on the board is the Risk Manager. This person is responsible for coordinating and unifying safety policies and procedures, collecting incident reports and acts as liaison with the insurance carriers. Many of our leaders are resistant to the idea of risk management, so this is a position that requires tact and persistence.

### **Employees**

While Columbus Outdoor Pursuits is a volunteer based organization, two full-time and two part-time employees have been hired to facilitate running the organization.

The **Office Manager** keeps an eye on the day to day operation of the organization and provides support/advice/nagging as needed to the Board and trip leaders. The person in this position also supervises office volunteers and the GOBA data entry operator, processes mail, phone calls, memberships, and gives clerical support to the President and Executive Board.

The Director of the Great Ohio Bicycle Adventure (GOBA) is responsible for the running of an 8-day, 3000 participant bike tour. Since GOBA visits a different part of the state each year, a great deal of the Director's time is spent rounding up towns and local volunteers to host the tour. The rest of the time is devoted to the organization of volunteers and tour administration.

With 3,000 people to register and send confirmation letters to, GOBA uses a part-time data entry clerk January through June. This is on an as-needed basis.

A part-time bookkeeper writes checks, keeps the general ledger and balances the checkbook.

### **Paying the bills**

Most trips run off the books as a strictly splitting-the-costs deal. Trip leaders may get their costs covered, but may not make money by leading the trip.

All COP programs are run by volunteers except The Great Ohio Bicycle Adventure. Most participants pay only the costs of the trip. Non-members are charged \$2 per day toward liability insurance and overhead costs. Special events and schools are priced to raise money to cover programs. Every effort is made to keep these schools and events affordable while still raising funds for the organization.

COP expects each activity to pay its own costs. In addition, each is asked to budget its income and expenses so as to make at least \$2 per person per day towards the overhead costs of the organization. Generally, each school or big event is planned so it will make money towards the support of the particular activity and the organization in general.

### **Communications**

COP publishes Columbus Outdoors, a monthly newsletter that is sent to all members. Additional issues are sent to bike shops, outdoor stores, libraries, high schools and interested parties such as the Ohio Department of Natural Resources and local city parks and recreation departments. This 16-page publication includes contact information for each activity and the Board, membership information, a schedule of activities, plus event registration forms, stories and photos. Since this is a volunteer organization, the number and variety of trips changes month-to-month, depending on who volunteered to lead a trip.

The editor works from home to collect, organize and lay out the issue. The official deadline for items is the first of the month, the month prior to publication; i.e. the deadline for the November issue is October 1. The editor takes the disk to the printer, around the 20<sup>th</sup> of the month with a target mailing date of the 25<sup>th</sup>. The Office Manager creates a mailing disk and takes it to the mailing house around the 22<sup>nd</sup>, depending on the printing status.

### **Succession**

Volunteers are expected to recruit and train their successors. In reality, they rarely do, disappearing with all the knowledge of how that particular event was run. After many years of constantly reinventing the wheel, COP has started to ask each volunteer to keep records, directions, and instructions for their successor, with a copy going to the Activity leader or the COP office. As part of their employment, the Office Manager and GOBA Director keep detailed notebooks on how to do their jobs. Each new Board member is issued a Board Notebook, a compendium of information about the organization including the constitution, operating guidelines, financial information, paperwork checklist, and a brief history. The President is responsible for ensuring that this book is updated annually. It is hoped that this process will make it easier to recruit volunteers and decrease the amount of frustration they experience as they learn the COP ropes.

### **Programs**

The Columbus Outdoor Pursuits trip program includes: bicycling, flat and white water boating, caving, backpacking, hiking, rock climbing and cross country skiing. In addition to these activities, COP maintains 8 cross-state bicycle routes and sells the maps at a nominal price. The backpacking and hiking program maintains a 12-mile section of The Buckeye Trail. This section of treadway also carries the North Country National Scenic Trail and The American Discovery Trail.

During the 12-month period from August 1998 through July 1999, COP offered 721 day trips, 67 weekend trips and 15 trips/programs of longer than a weekend. In addition, the organization held monthly program meetings and activity planning meetings. COP had 41,738 trip participant days during this period.

## Schools

Columbus Outdoor Pursuits offers the following schools/classes.

- Leadership Training
- Wilderness First Aid
- Wilderness First Responder
- Red Cross Standard First Aid
- Canoe I (twice a year)
- Canoe II (River School)
- Intermediate Canoe & Kayak School
- Kayak I (spring & fall)
- Kayak II (spring & fall)
- Closed Boat Roll Sessions (weekly June-August, Jan-March)
- Raft School (occasional)
- River Rescue (occasional)
- Beginning Backpack School (spring)
- Hiking school (fall)
- Compass Class (spring)
- Map Reading Class (fall)
- Beginners Caving
- Kids Climb (monthly)
- Rock climbing orientation (monthly)
- Bicycle Maintenance (winter)
- Bicycle Safety Program (middle schools Sept-May)
- GOBA includes safety cycle program, and interpretive programming
  
- Informal instruction on all trips

New in 2000 were an Introduction to River Crossing and Canyon Travel and also a Snow Travel class for Backpackers.

## Major Events

**Tour of the Scioto River Valley (TOSRV)** is the longest running, largest two-day bicycle event in the country. Cyclists ride 210 miles from Columbus to Portsmouth, Ohio and back every Mother's Day Weekend.

The goals of this event are to provide a personal challenge that emphasizes safety and stamina; provide a ride accessible to people of all ages and abilities who may take part by constraining prices and providing route options of various lengths;



maintain tradition for riders and volunteers; maintain TOSRV as a high value event; and to help support the operating expenses of COP with its revenues and earnings except when this is in irreconcilable conflict with the 1st two goals. (Operating Guidelines p. 8-1)

**Great Ohio Bicycle Adventure (GOBA)** is a weeklong loop tour in Ohio. Three thousand cyclists explore small communities in the state. Started in 1989, The GOBA mission is to organize a yearly one-week bicycle vacation, in order to inspire independence and nurture personal growth; learn about Ohio, its people, geography and history; provide inter-generational recreation; enhance the image of bicycling in Ohio; raise funds for bicycle-related projects in Ohio. (Operating Guidelines p.8-1)

**Across Ohio Bicycle Adventure (XOBA)** is a weeklong cycle tour from one side of Ohio to the other. Like GOBA, it uses a different route each year. A one hundred fifty participant limit makes this a much more intimate group than GOBA. Participants are expected to be independent, experienced cyclists because there is much less support for this tour than GOBA and the route is longer.

**Patch Rides** are full-service day rides in the central Ohio area, generally used as training rides for the larger, more difficult tours. Two snack stops, a lunch stop, mechanical and sag support are the norm for these tours. Currently, COP runs four of these, plus the Columbus Fall Challenge, which is a long, extremely hilly two-day tour.

**Budget Tours** offer cyclists minimal services for a minimal price. \$2 for members, \$4 for non-members buys cyclists arrows on the route, maps and a place to park their car. They are on their own for food, water and any sag service they might need. COP runs seven of these a year.

#### **Contributions to the Community:**

As a 501©(3) organization, Columbus Outdoor Pursuits gives back to the community. In fact, all profits from the Great Ohio Bicycle Adventure go to our Bicycle Project Development Fund, which is used to fund tangible projects that promote bicycling in Ohio. Some recipients of COP funds have been the Ohio to Erie Trail (Further Trail Mission) Family Medicine (Support Study of cyclists), The Ohio Bicycle Federation (General Fund) The cities of Gahanna, Columbus, Pickerington, Ohio State University (Bicycles for Police) American Red Cross (First Aid Training) and the Central Ohio Amateur Radio Emergency Service (Purchase Repeater).

Running a volunteer based organization requires many volunteers willing to donate a significant amount of time and effort to good of the group. The responsibility shouldered by Trip Leaders and Activity Chairs is not to be taken lightly. As with all groups, the trick is to provide enough structure and support without tangling the volunteers in red tape. Given free rein to take initiative and enough guidance to manage risk and handle paperwork, many members will step forward to lend a hand.

“You can ride your bike without an organization, but without the organization to provide the structure, there is no ride (organized tour)”. – Julia Schmitt, COP volunteer (2000, September)

## **References**

- Columbus Outdoor Pursuits (1999). Operating Guidelines. Board Notebook (p. 8-1,15-1). Columbus Ohio: COP
- Columbus Outdoor Pursuits (2000, February). Trip Leadership Manual (p.2). Columbus, Ohio: COP

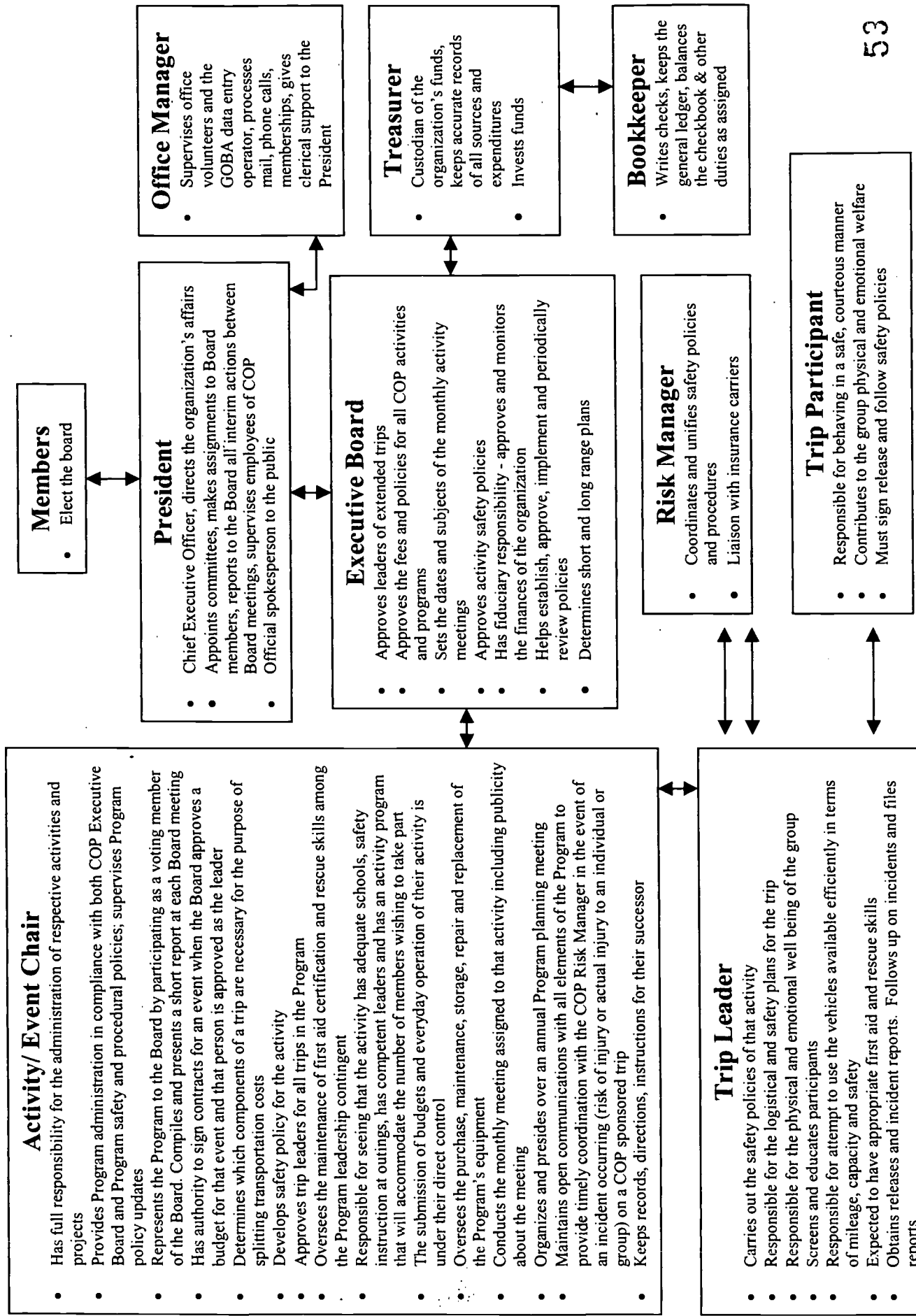
## **Biographical Sketch:**

**Ann Gerckins**, B.F.A., discovered her self-fulfillment in outdoor pursuits. Her outdoor education came through Columbus Outdoor Pursuits, SOLO and workshops at the Appalachian Long Distance Hikers Association (she has completed the A.T.), and the Wilderness Risk Managers Conference. A COP member for 27 years, and leader for 20 years, Ann teaches backpacking, leadership, and helped write the COP's Trip Leadership Manual. She introduced COP to Wilderness First Aid and arranged WFA courses through SOLO for 6 years.

## **For further information, contact:**

Ann Gerckens  
Columbus Outdoor Pursuits  
P.O. Box 14384  
Columbus, OH 43214-0384  
Phone: (614) 447-1006  
Fax: (614) 262-1001  
E-mail: Columbus\_Outdoor\_Pursuits\_@compuserve.com

Columbus Outdoor Pursuits Organizational Structure at a Glance (Board Notebook p.15-1)



## **Appendix B:**

### **Some of COPs Operating Guidelines (Board Notebook. p.8-1 to 8-14)**

The Columbus Outdoor Pursuits Executive Board consists of sixteen (16) elected positions plus not more than 16 ex-officio positions.

Voluntary ex-officio positions on the board reflect the quantity of ongoing activities and functions represented or supported. Service term is subject to individual discretion. Current positions are the Activity Chairs of: Backpacking, Bicycling, Boating, Hiking, Rock Climbing, Winter Activities; The Function Chairs of Risk Manager, Publicity, and Editor of the newsletter; and the Event Chair, Director of TOSRV.

Ongoing **Committees and Task Forces** include:

- Bicycle Advisory Committee
- Finance
- GOBA Advisory
- Insurance
- Newsletter
- Personnel
- Publicity
- Insurance/Risk Management

Temporary Committees include:

- Nominations - The President shall nominate and the Board shall approve a Nominating Committee in July.
- Audit- The President shall nominate and the Board shall approve an Audit Committee in October

The regular meetings of the Executive Board shall be held at 7:30 p.m. on the first Thursday of each month except November. The November meeting shall be a weekend conference meeting. Quorum is 10 members present in person. All COP members are to be encouraged to attend Board meetings

### **Policies**

The Executive Board sets policy for Columbus Outdoor Pursuits. The Operating Guidelines are a compendium of the policy decisions made by the Board in the orderly administration of the organization. The Board may amend this document by majority vote.

## **Judgment-Impairing Substances**

No one shall participate in Columbus Outdoor Pursuits activities while under the influence of judgment-impairing substances as defined by law. The inappropriate, improper, or illegal use of alcohol or drugs will not be tolerated.

No judgment impairing substances shall be consumed by operators of transportation conveyance devices during Columbus Outdoor Pursuits activities.

No one shall be permitted to use property/equipment owned or controlled by Columbus Outdoor Pursuits while under the influence of judgment impairing substances.

All participants must be in compliance with local and state laws.

## **Americans With Disabilities Act**

COP will make a good, faithful effort to comply with both the letter and intent of the Americans with Disabilities Act in all areas of our organization including but not limited to employment, facilities, meetings and activities. COP will make reasonable efforts to accommodate needs of people with disabilities if notified in advance.

## **Youth Participation**

A major aim of COP is outdoor education for people of all ages. This commitment includes a dedication to youths in COP events. However, in dealing with youths certain guidelines apply:

- Anyone ages 18 or older is an adult who may participate on his or her own volition.
- Anyone under 18 is a minor who may participate in only one of two ways:
  - The youth's parent or legal guardian accompanies the minor on the event and is responsible for the minor;
  - The person has written permission and liability release from his or her parent or legal guardian to participate. In this latter case, the trip leader may designate a responsible adult participant to assist and monitor the youth or youth involved.
- COP sets no age limits on youth participation. The trip leader determines whether the youth is mature enough for the event and is physically capable of meeting the exertions involved. The trip leader should also determine whether the particular event will be safe for the individual youth and whether the youth's participation would be commensurate with the trip goals for the group. Signed liability releases for all youths must be kept on file.

## **Documentation**

- **Minutes** are kept by the Board Secretary at home.
- **Financial records** are kept by the Treasurer at the COP office.
- **Membership records** including a Membership list are kept at the office by the Office Manager.
- **Board Phone list** is updated periodically and distributed by the Board Secretary.

- **Trip reports** are sent by trip leaders to the office. These are picked up quarterly by Activity Leaders before writing their Excess Medical Insurance Reports. They are kept at the home of a designated member of the Insurance/Risk Management Committee. Lawyers have advised COP to keep releases for 20 years (long enough for a child to turn 18 and have a 2 year statute of limitations).
- A **phone book** of Columbus Outdoor Pursuits members shall be produced once a year. The Columbus Outdoor Pursuits Membership list is closed; it is not available for use outside of the organization.

### **Manuals**

- Activity Leaders Manual is maintained by the Insurance/Risk Management Committee.
- Board Notebook is maintained by the President.
- Office Managers Handbook is maintained by the Office Manager.
- How To GOBA is maintained by the GOBA Director.
- Employee Handbook is maintained by the President.
- An Annual Report is produced in early October by the Office Manager.

### **Expenditures**

- Members of the Board have budgetary authority for their activities.
- Expenditure of Columbus Outdoor Pursuits funds shall only be made upon presentation to the Treasurer (or designated agent) of a properly signed pay order.
- Expenditure of unbudgeted Columbus Outdoor Pursuits funds shall only be made in the following cases:
  - An activity or overhead budget overrun of 10% may be approved by a Board member but the board must be advised of it at the next regular meeting of the Board.
  - An expenditure of greater than \$500.00 must be approved by the Board and the motion to approve that expenditure must be distributed to the Board a minimum of 72 hours before the meeting at which the motion is to be considered.
- Activity Chairs each have the authority to sign contracts for an event when the Executive Board approves a budget for that event and that person is approved as the leader.

### **Fees**

- Children age six and under shall not be charged an equipment rental fee in Columbus Outdoor Pursuits activities; children between the ages of seven and twelve, inclusive, shall be charged half price.
- The non-member fee for participation in Columbus Outdoor Pursuits activities shall be \$2.00 per day.
- Activity/Function specific fees are determined by either the Activity Chair and/or Board and are subject to change by appropriate procedures.



## **Costs**

- The cost of transportation of a trip shall include the costs for gas, parking and tolls in transporting all necessary components of that trip. It shall be left to the discretion of each Activity Chair to determine which components of a trip are necessary
- The transportation cost shall be defined as the total cost of transportation of the trip, as defined above, divided by the number of people on the trip other than the person(s) providing the vehicle(s).
- Leaders of standard and extended trips shall be paid a fee not exceeding the actual leader costs. If there are no more than ten trippers, not counting the trip leader, each tripper shall be assessed ten percent of the leader costs. If there are more than ten trippers the leader's costs may be pro-rated among all the trippers of the full ten percent fee may be charged each tripper provided the additional money is used to pay assistant leaders. All trippers including trip leaders must pay trip fees and equipment rental.
- Leaders' costs shall be defined as the costs that the leader of a trip would incur for meals, transportation, over-nights, and miscellaneous costs (including the cost of admissions, phone calls, maps, and necessary administrative expenses).
- Trip costs are determined by the trip leader, except for special event fees, which are determined by the Board.

## **Refund Policy**

- The trip leader must announce, at the time a trip is listed, the refund policy on deposits if deposits are required. The trip leader must establish a date beyond which deposits are non-refundable.

## **Donations and Funding**

- The life member fund shall maintain a balance of \$20,000, the income of which shall be used to defray costs associated with membership services provided to Columbus Outdoor Pursuits life members.

## **Bicycling Project Development Fund**

- The Bicycling Project Development Fund is set aside to create an endowment to fund projects related to bicycling as defined as programs and projects to benefit bicycling, to include, but not be limited to:
  - Creation and repair of bicycle ways, engineering studies, plans, and right-of-way purchases
  - Bicycle education
  - Any other purpose within the scope of the constitution of Columbus Outdoor Pursuits.
- The Fund shall be invested as the Treasurer sees fit and may be co-mingled with other COP funds. It shall be invested in a prudent manner and the income derived from that investment shall inure to the Fund in a manner to be determined by the Treasurer

and approved by the Board. The Fund shall be endowed annually by the Board at the August meeting, upon review and agreement concerning the fair amount of excess funds generated by The Great Ohio Bicycle Adventure in that year.

- The Bicycling Project Development Fund of Columbus Outdoor Pursuits accepts applications for projects based on the criteria listed below. Grants are awarded based on merit and quality of applications. COP accepts applications annually between August 15 and September 15. Applications are reviewed during September and the Board considers proposals at its October Board meeting. Applicants will be notified by November 1.
- Eligibility is limited to government agencies or organizations with a tax-exempt status [501 (c)(3)].
- Proposals must be for capital improvements (e.g. bike paths, bike lanes, bike routes, secure and weather-protected bike parking facilities) or bicycling education (e.g. sponsoring seminars, brochures).
- Projects must secure matching funds of at least 50%. The match can be any combination of local, state or federal funds or donations from individuals, corporations or foundations. Generally they will be cash, but in-kind services may be acceptable in certain circumstances
- In recognition of the source of these funds, proposals promoting and supporting the use of bicycles for long-distance travel and commuting are favored
- Funds are for use within one year of appropriation
- The funds will be disbursed on a per project basis
- The Bicycle Development Fund Committee reviews proposals and makes recommendation to the board how to divide any available grant money among applicants

### **Risk Management**

- Activity Leaders shall develop safety policies for their activities. The Board shall review and approve these policies
- All leaders will be trained in first aid to the degree appropriate to the activity or have someone on the trip that is trained.
- In addition, all leaders are encouraged to maintain current certification in the Red Cross' "Adult Cardio-Pulmonary Resuscitation". All leaders, but especially leaders of trips to locations where professional medical help is not readily available, should consider taking "Advanced First Aid". Boating leaders are also encouraged to take "Advanced Lifesaving". Rescue courses designed for specific activities are also recommended.
- Activity leaders should periodically encourage their leaders to attend first aid and rescue courses. The Executive Board should consider first aid and rescue skills when approving extended trip leaders.
- All first aid classes will be minimally priced to cover their costs, including office overhead and insurance.
- Individuals who are willing to organize or instruct "Standard First Aid" and "CPR" courses for Columbus Outdoor Pursuits shall have all course fees, necessary to obtain instructor certification, paid by COP.

- The cost of rescue or other courses specific to a particular activity should be charged to that activity; appropriate amounts should be budgeted by the activity leaders.
- When an incident occurs that results, or in the estimate of the leader could have resulted, in injury requiring first aid treatment as defined by the American Red Cross, a "COP Incident Report form" shall be completed by the Trip Leader or their designate. The "COP Incident Report" and supporting documents, including the "Trip Report," will then be sent to the appropriate Activity Chair and the Risk Manager in a timely manner. The Risk Manager will send the information to the insurance company.
- Any person with knowledge of an incident may at any time, request an internal Review. The Review team will consist of at least the Risk Management Coordinator the Event Coordinator, and the Chair of the Activity in which the incident occurred. Others may be added to this team at the discretion of the Risk Manager. The Risk Manager will report results to the Board.
- Leaders must be 18 or over, based on legal advice

### **Goals of Risk Management**

The main objective of the Risk Management Program is to protect our members.

1. Utilize preplanning to avoid injury
2. Use releases (waivers) as mitigating tools
3. Use meaningful accident (or occurrences) reports
4. Have pertinent guidelines to use in the field

### **Trips**

- A "Standard Trip" shall be defined as one lasting four nights or less.
- An "Extended Trip" shall be defined as one lasting more than four nights.
- Leaders of Extended Trips shall be approved by the Board by majority vote.
- The schedule of Standard and Extended Trips as well as the leaders of Standard Trips shall be approved by the Activity Leader.
- The Activity Leader shall develop safety policies for their activity. The Board shall review and approve these policies.

### **Trip Leaders**

- The role of the trip leader, in part, is to carry out the safety policies as approved by the Executive Board, consistent with circumstances, and safeguard Columbus Outdoor Pursuits-owned equipment.
- Trip reports should be returned to the office and funds deposited within one month of the end of the trip.

**Mass Events** are characterized by activity. For boating, more than about fifty (50) people involved. For bicycling, the break may be at about 500 people. Mass Events are usually advertised out of our newsletter.

The Board shall set fees and policies for Special Events. Fees for special events should reflect a price differential favoring COP members.

### **Training**

A course for trip leaders shall be held each year. New trip leaders who will be leading overnight trips must attend this course unless exempted by the appropriate activity leader. Leaders of extended trips must attend this course unless exempted by the Board.

### **Equipment usage and priority**

- COP trips have first choice on the use of equipment owned COP. To exercise this right of use, the person borrowing the equipment must notify the person responsible for the equipment at least one week before the needed date. If the request is within one-week cutoff, the COP trip loses its first priority.
- When two COP events or activities need the same equipment at the same time, the first person making the reservation has right of use.
- Others requesting use of Columbus Outdoor Pursuits owned equipment must make reservation with the responsible individual a reasonable time in advance. The order of priority is first choice COP members for organizations, second choice to COP-type organizations, third choice to other organizations, and fourth choice to individual COP members.
- COP equipment can never be used in a profit-making scheme by an individual or organization.

# NAVY MORALE, WELFARE, AND RECREATION OUTDOOR RECREATION RENTAL CENTER MANUAL

**Ed Dunning**

**ABSTRACT:** The Outdoor Recreation Rental Center Manual will help identify resources needed to equip and sustain equity in access and availability, while maintaining the uniform high quality, and safety of all MWR Outdoor Programs. This manual is not a Navy instruction or regulation.

The manual is intended as a guide for Morale Welfare and Recreation (MWR) Outdoor Recreation Rental Center managers and staff at installations Navy-wide. It is recognized and evident that each rental operation is different. The manual has been written to address the wide variety of differences, which occur naturally because of variables such as location, environmental conditions, adjacent and/or accessible civilian recreation opportunities, and the particular mission of each MWR Department and base.

## **Program Definition**

The ORRC is a facility that provides outdoor recreation equipment items to encourage and promote organized and self-directed outdoor recreation activities. At larger bases the ORRC is often a stand-alone facility while at the smaller bases it is more common for the ORRC to be co-located with one or more related programs in a single facility. Moreover, it is not uncommon for staff to be shared between all of the activities in the single facility and with other MWR programs. It is understood that base demographics, the local environment, seasonal opportunities, natural resources, funding levels, base traditions, and the staff's knowledge and skills govern equipment types and quantities of equipment offered.

## **Application**

The manual applies to any Navy outdoor recreation program renting equipment and gear. These guidelines can be applied worldwide to ensure Sailors and their families have access to the best possible outdoor recreation rental services possible, regardless of duty station.

## **Summary**

The ultimate goal of the publication is to improve Navy Outdoor Recreation Rental Centers worldwide.

**Biographical Sketch:**

**Ed Dunning** worked eight seasons as a trail crew construction foreman and on a trail maintenance crew with the USFS in Washington State. During this time period his winter months were spent as an alpine ski instructor and collector of unemployment compensation. At McChord AFB, Ed worked one year as an outdoor programmer/guide. In 1998, Ed began work at the Naval Air Station, Whidbey Island, as the manager of their rental shop. From there he increased the operations to include outdoor programs, gear repair service, and an outdoor specialty resale shop. While at NAS Whidbey he also guided and instructed canoeing, rock climbing, backpacking, skiing and snow shoeing activities. Currently Ed works for the Bureau of Naval Personnel as the Navy's World Wide, Outdoor Recreation Specialist. His academic background includes a BA in Art from Washington State University and MA in Art from Central Washington University.

**For further information, contact:**

Ed Dunning  
Outdoor Recreation Specialist  
Navy Personnel Command  
MWR Division- 659  
5720 Integrity Drive  
Millinton, TN 38055-6590  
Phone: (901) 874-6694  
Fax: (901) 874-6823  
DSN: (882) 6694  
E-mail: P659B4@persnet.navy.mil



# INTERNATIONAL FEDERATION OF MOUNTAIN GUIDE ASSOCIATIONS (IFMGA) ROPEHANDLING TECHNIQUES

Iain Stewart-Patterson

**ABSTRACT:** Professional guides and recreational climbers will have a significant difference in the way they approach certain types of terrain. The ropehandling techniques used to manage the terrain features will also be different. Primary to the guide-client relationship is a shift in the way of thinking about the partnership of the rope. The relationship is based on a contractual agreement, where money is exchanged for services. As such, this is a non-peer based arrangement. There is typically a considerable difference in both technical and decision-making ability. This leads to an expectation of a level of care that exceeds that of a typical peer based climbing partnership.

As a result of this shift in the way of thinking, different techniques are used to deal with specific terrain scenarios. Three specific scenarios examined here are; third class terrain, rock rescue, and glacier travel. Third class terrain is defined as scrambling involving the use of hands and feet for upward progression. It is easy climbing, however a slip may have dire consequences if there is any exposure. The predominant rescue concern on steep rock is that of aiding a fallen or injured client who is below the guide. The primary concern while traveling on a glacier is that of having only two people on the rope.

## **The IFMGA**

The following ropehandling techniques are standard procedures laid out by the Association of Canadian Mountain Guides (ACMG). These guidelines fit within the expectations of a fully certified Mountain Guide as per the standards set out by the International Federation of Mountain Guide Associations (IFMGA), also known as the UIAGM. The IFMGA has sixteen member countries including: Canada, The United States, Britain, New Zealand, France, Italy, Switzerland, Austria, Germany, Slovenia, Slovakia, Japan, Norway, Sweden, Spain and Peru.

## **Third Class Terrain**

The problem for a guide when traveling in third class terrain is how to move quickly and efficiently and still maintain an adequate safety margin. Soloing is fast, but leaves a minimal margin for error. The guide has a reduced level of control. The solution that has evolved over the last hundred plus years is short-roping. In this scenario, the guide and the client move together connected by a short length of rope. This only works if the guide is able to hold a slip at any time and prevent it from becoming a fall. If the guide is in an unstable position, or one that requires the use of both hands for upward progression, the client must be stationary, or on safe ground. Typically short-roping is combined with short pitches on the harder steps. The guide will move up twenty to fifty feet then

establish a rudimentary belay. This belay may consist of the rope wrapped around a block, or the guide braced in a solid stance using a shoulder, waist, or hand belay.

It is important to recognize that short-roping is a complex skill which requires extensive training and practice. It is crucial to practice holding actual loads as this will help to accurately assess the limitations of the technique.

Short-roping has been described as “Climbing without anchors, tied to someone who is trying to pull you off”. The actual technique involves the guide staying above the client whenever there is a possibility of a slip, even on traverses. The rope is kept as short as possible, with variations occurring as the terrain dictates. On snow, the distance will be quite short and a constant length. On rock, the guide will keep ten to thirty feet of extra rope in his hand, paying it out and taking it in as needed. The downhill technique requires the client to lead. In complex terrain where the route-finding is difficult, the client may need constant instruction as to where to go.

Short-roping is all about preventing a fall. Good route-finding, pacing, and modeling are the key to success. Above all, high quality communication is more important than the ropehandling skills to hold a fall.

### **Glacier Travel**

Glacier travel can pose a particularly perplexing problem for a guide traveling with a single client. The problem revolves around the need for the guide to be out front in complex terrain to select the route and avoid hazards. There is additional stress placed on the guide when the client does not have the skills to rescue the guide should he fall in a crevasse.

Although there are a number of ways to avoid ending up in this scenario, the bottom line is that the potential for it to occur cannot be totally eliminated. If it is not possible to bring more clients, and or to train the client(s) in crevasse rescue techniques, then it becomes necessary to either choose terrain where a crevasse fall is unlikely, or modify the ropehandling techniques. The rope management technique that works particularly well in this situation is to tie knots on the rope between the guide and the client. The knot to use is the overhand on a bight. Knots are tied on the rope ten feet from the client and from the guide and then every five feet, for the next twenty feet. These knots serve a dual function. If either the guide or the client falls into a crevasse, the knots will jam in the snow at the lip of the crevasse and make it much easier to hold the fall. The secondary function is that they provide a ladder, which the fallen climber can use to ascend the rope. This will be easier to do than prussiking up the rope, especially if the rope has cut back into the lip of the crevasse.

### **Rock Rescue**

This final scenario is more complex for the recreational climber than the guide. A recreational climber may need the skills to rescue either a fallen leader or a fallen second.

Rescuing an injured leader is a complex situation. The steps include: ensuring that the anchor can hold an upward pull, transferring the load from the belay to the anchor, ascending a loaded rope (hoping that the piece of protection that held the initial fall does not subsequently fail), reinforcing the piece to create an anchor, transferring the fallen climber onto the anchor, applying any first aid required, prussiking or rappelling back down to the original anchor, taking apart the original anchor, prussiking back up to the top anchor while cleaning the other protection, and finally lowering or rappelling with the injured climber.

The much simpler scenario of rescuing an injured second is the one that a guide may need to address. There are a number of variables that will effect how the guide rescues the second. These variables include: the extent of the injuries, and the difficulties of the terrain. There are a number of components that can be linked in a variety of ways. The primary components include: the Italian hitch, a blocking knot, the Prussik hitch, a ratchet, a pulley system, and the block and tackle.

The steps in rescuing the second are: arrest the fall, block the belay, transfer the load to the anchor, assess the situation, attend to the victim, and create a lowering, raising, or counterbalance system. The criteria for a decision are based on the use of gravity whenever possible. If there is a minor injury it will be best to lower the client back to the previous station. In the event of a major injury, it is essential to get to the client as soon as possible to treat the injuries. The most efficient way to achieve this is a counterbalance rappel. Raises are used only when the terrain below precludes a lower. Examples of this would be on easy traversing terrain and on overhanging terrain. Raising is most useful when there is a ledge not far above the victim. The reality of this technique is that it is very difficult to raise someone more than twenty feet.

### **Summary**

These are skills expected of a professional guide. Some of the techniques also have applicability for the recreational climber. Short-rope is the most complex technique and should only be used when the relationship between the two climbers equates that of a guide and client. It is very important to recognize that when two climbers move together with a rope connecting them, without the use of anchors, stances, or belays, they are tacitly agreeing to fall off together.

Short-rope, rock rescue and two-person glacier travel are all specialized techniques that require training and practice. It is essential to understand both the application and the limitation of each technique.

### **Biographical Sketch:**

**Iain Stewart-Patterson** is a fully certified mountain guide (IFMGA/UIAGM) with the Association of Canadian Mountain Guides. He has over 20 years experience ski touring, mountaineering, and ice and rock climbing. He has been on expeditions to Nepal, Peru,

Mexico, and Alaska. On technical rock and waterfall ice terrain, he has completed over 30 first ascents. Ian is currently the program coordinator of the Adventure Guide Diploma at University College of the Cariboo, where he teaches a combination of theory and activity courses. Iain is a Professional Member of the Canadian Avalanche Association and is an instructor for both the Association of Canadian Mountain Guides and Canadian Avalanche Association Training School.

**For further information, contact:**

Iain Stewart-Patterson  
The University College of Cariboo  
P.O. Box 3010  
Kamloops, BC, Canada V2C5N3  
Phone: (250) 828-5184  
Fax: (250) 371-5845  
E-mail: [spatterson@cariboo.BC.CA](mailto:spatterson@cariboo.BC.CA)

# WHITEWATER KAYAKING INSTRUCTION: SKILLS AND TECHNIQUES

**Raymond Poff**  
**Tom Stuessy**

**ABSTRACT:** This paper is an attempt to very briefly communicate ideas that can help facilitate effective kayaking instruction. It covers such topics as: remembering the less obvious aspects of instruction, progression, ice breakers, stretching, equipment orientation, underwater comfort, wet exits, posture, eskimo rescues, instructor rescue, Eskimo rolls, forward strokes, sweep strokes, stern draw, and risk/judgment.

Learning how to kayak and how to be an effective kayak instructor is an on-going process of learning from personal experience, other kayakers, instructors, and excellent books and videos. In light of this, the authors would like to say that they are still actively engaged in the learning process and are by no means experts in kayaking, kayaking instruction, or writing. We would like to extend a special thanks to the ACA Whitewater Kayaking instructor trainers, friends, family, and others who have enabled us to become better kayakers and instructors.

## **About the ICORE Presentation**

The purpose of the hands-on session was to explore avenues in teaching whitewater kayaking techniques. Topics such as teaching progression, stretching techniques, boat fitting, strokes, eskimo roll, and rescues were covered. Ideas were solicited from the attendees after a demonstration of each skill and discussions were generated on the different techniques.

## **Remember the Less Obvious**

Instructors often focus so much on details related to teaching the mechanics of specific skills that they overlook less obvious, but equally important aspects. These aspects are the underlying purposes and guiding principles of kayak instruction. Be sure and remember that the students' progression in learning and success in kayaking may actually rest on an instructor's knowledge and ability to communicate these aspects.

## **Progression**

Teaching progression is something every good kayaking instructor thinks about as he/she prepares for class. While it is one of the most important concepts of formal training, it is typically overlooked as instructors are trained to think of progression from a kayaking perspective. We as instructors know how we will teach the roll or an Eskimo rescue, but how many of us address formal introductions, ice breakers, the value of humility, or anxieties associated with getting into a boat for the first time?

## **Ice Breakers**

This is a great way to get people familiar with each other and also to get them moving and laughing as a group. This can create camaraderie quickly and promote a “team effort” in an activity that is perceived very individualistic to many beginning boaters. Other progression ideas include formal introductions. We ask the participants to explain why they enrolled, identify an expectation for themselves as well as the group, and what their biggest anxiety is in regard to kayaking.

## **Stretching**

Once the group has been introduced and hopefully laughed a little they need to stretch. Some creativity with stretching can serve the dual purpose of preventing injury and having some fun. The “finger dance” is an effective technique. All the participants are standing in a circle and start by holding out their arms and wiggling their fingers. The motion moves up the arms, through the neck, down the torso and finally the legs. The trick is to keep all movement going at the same time, which produces some strange looking and funny “dances”. Furthermore, keep in mind the importance of hamstrings and encourage them to stretch before your course dates by including a small stretch routine in your information mailings to participants.

## **Equipment Orientation**

This would, on the surface, seem straightforward. It is. However, it is also time consuming and something they can learn about and ask questions about during the course. Have them pre-read about as much about equipment as you can. This will serve more than one purpose. First it gives the students a chance to come armed with information releasing some anxiety and encourages an attitude that “I know a little about kayaking”. Also, get creative! Have them each talk about an item of gear to the rest of the class. This will engage them as well as get to feel comfortable with each other.

## **Underwater Comfort**

This less obvious aspect of underwater comfort is worth discussing. The ability of a student to remain calm and collected in and underwater will no doubt influence their overall comfort and confidence while kayaking. Students’ first reaction when finding themselves inverted is to immediately bail out of the kayak. People don’t breathe underwater, so this is a natural reaction at first. Instructors need to ensure that each student is ok being in the water to begin with before getting into a kayak. This needs to be done so as to not embarrass anyone. One suggestion is to announce early in the class that if anyone has concerns with being in the water that they can talk with you when it seems appropriate to them, perhaps while other class members are getting equipment or adjusting kayak foot pegs. An assumption could be made that if someone signed up for a kayaking class that they were comfortable in water – this may not necessarily be true. They may in fact be taking the course to help overcome a fear of water.



## **Wet Exits**

The purpose of the wet exit is to safely get out of the kayak when attempts at the eskimo roll or rescue fail to occur before running out of air or patience. When teaching the wet exit, it is helpful to have students go through the process on land before going upside down. Outline each step that the students need to follow. These could include: 1) tuck forward and kiss the boat deck; 2) hit the bottom of the kayak enthusiastically to announce that the kayaker is upside down; 3) count to five or ten using fingers (this helps to reinforce the fact that the student won't instantly run out of air); 4) slide hands forward along cockpit coaming to the grab loop;

## **Posture**

Efficient paddling requires the practice of proper posture while in a kayak. Proper posture is generally considered to be sitting up straight or with a slight lean forward. An extreme lean toward the bow or stern inhibits torso rotation and balance, which is critical for proper and effective technique. In order to help teach this principle, try this activity. Have the students, while in their kayaks in the water (with paddles), lean all the way forward and rock their boats from side to side. Repeat this while leaning all the way back, and then while sitting up with good posture. Ask the students to describe how the rocking exercise differed in the three postures. Next have them lean all the way forward and try to model a forward stroke, emphasizing good torso rotation. Have them repeat this leaning all the way back and then sitting up. The students should quickly realize that extreme leans in either direction will reduce their ability to rotate their torso or to effectively balance their kayaks. Students that understand the importance of boat control and torso rotation will become better paddlers.

## **Eskimo Rescue**

The eskimo rescue (also known as a bow rescue or T-rescue) is a skill in which many other important skills are used, such as the hip snap, loose hips, head down, and underwater comfort. Take the time to rehearse your dialog as an instructor and give simple, straightforward information. After a thoroughly narrated, well-demonstrated eskimo rescue i.e., both hands in the same direction (play 'Pac-Man' with your hands), calm and slow, head on the bow of rescue boat, not pushing down too hard on the rescue boat, and snapping hips keeping the head as low as you can, the instructors should take a student step by step through the rescue while the others continue to watch. Once they have a solid grasp of the mechanics, let them rescue each other. Letting them rescue each other provides an avenue to self-confidence, or at least another well-done wet exit.

**Note:** It is critical that instructors communicate the potential that exists for injury or even death while waiting underwater for a rescue. Emphasize that this rescue is best used in areas with deep water and few, if any, obstacles. If your program encourages student-to-student eskimo rescues on the river, do not forget to teach the importance of vision and looking for down stream hazards! There is no need for two rescues!

## **Instructor Rescue**

This rescue can be a very effective means of righting an overturned student in some circumstances. As with the bow rescue, safe water is usually best for using this technique. It can be utilized without students knowing that it might happen, but advising your students ahead of time will make it easier for you and them. Essentially, the instructor paddles up beside an overturned kayak and pushes down on one side and pulls up the other. Some differ on which side should be pushed and which should be pulled, pool practice will allow instructors to figure out their own preferences. To make rescue easier, a student should hug their kayak while underwater to help keep their center of gravity low.

*Note:* Please realize and communicate again the inherent risks in hanging out underwater waiting for a rescue. The student will need to learn to assess the river environment and make judgments accordingly.

## **Forward Strokes**

The forward and sweep strokes are skills in kayaking that evolve. Some say the mechanics can be explained, but the practice of that skill will enable it to develop for the person using it. As with many strokes in kayaking, they become hybrids of other strokes in the “heat of the battle”. This does not mean technique is sacrificed, it simply means strokes run together. Break the stroke down into the catch, power, and recovery phases as you normally would. An analogy that we use is the “can in the refrigerator”, which stresses the importance of the front rotation before the catch and power rotation phase. Whatever your beverage choice, reach to the back of the fridge for it while keeping your high hand on the freezer. This will remind them to use their torsos in both directions resulting in a full, efficient stroke.

*Note:* Stress vision. Your head follows your eyes, your body follows your head and your boat follows your body.

## **Sweep Stroke**

Some ACA instructor trainers suggest that any stroke going past the hips becomes a sweep stroke. There is some debate about this, however, it is one way to distinguish between the sweep and the forward strokes. After a good rotation and catch phase - encourage students to make a “rainbow” on the side of their boat. Paddle position is also very important. Forward strokes are often as vertical as possible, while sweeps are as horizontal as they can be. Slow and in control is the best sweep. Be insightful and break down what you do with your stroke on the river and remember what it was like to learn it. Do you use your hips to sweep? Is there more pressure on one leg than the other? Are you leaning? Be sure to explain why each stroke is used and promote good posture and vision all the while being the best “model” you can be. Students will mimic your technique. If it’s good, they will be someday too.

## **Stern Draw**

One of the most effective strokes to have in one's repertoire is a solid stern draw. Simply put, a stern draw is the last third of a sweep stroke. On a clock face, with the kayak bow being 12 and the stern being 6, a stern draw should be placed at approximately 4 or 7. The paddle blade should be perpendicular to the water and the lower body should be used to kick the back end of the kayak toward the paddle. The stern draw is an excellent tool for quickly correcting the kayak angle. One application is that of correcting the angle during a ferry. A stern draw on the downstream side of the kayak will correct the angle and allow the ferry to continue on course. The stern draw can also be converted to a rudder stroke to allow for long-term angle management on flat water.

## **Eskimo Roll**

The eskimo roll is what most students come to a beginning kayaking class to learn. Learning is a progression. Don't fault and teach the roll too soon. A certain level of success comes with confidence and also past failure. Student must learn "how" to learn skills in their boats and from experience realize it comes with, for many, frustration. With the realization that this kayaking stuff isn't so easy, they'll be more receptive to new information when they don't pop the roll on the first time. A good progression makes the all mighty roll something worth working for and uses past successes as fuel.

Common instructor problems with the roll can haunt and cause unnecessary frustration for a first timer. Stress the importance of the first "C". As students roll out from the set up, instructors watch the paddle position, not the body position. Look down and see where their head is; it should almost break the surface. If the head is high, the body is wound up and ready to snap. Encourage students to arch their backs and really "reach" for it. Once the student is upright and breathing the precious air they missed for six seconds, look to see where their elbows are. Are they high, low, or uneven? The pool is great roll practice. However, it does not prepare anyone to be ready for what lies just down stream. Make sure when students pop up, they are in a position to paddle, protect, and brace. Another technique that we use is the towrope. Once the student is comfortable with the roll, we attach a rope to their boat and pull them through the water for resistance. This is as close you can get to a river situation.

## **Risk & Judgment**

Instructors can't teach judgment to their students. The ability to make judgments is a process that is learned through experience over time. Instructors can, however provide reference points from which their students can begin to develop this ability. Some basic guidelines that have always proved beneficial were from a *Canoe and Kayak* magazine article (of which I don't remember citation for). The article was discussing judgment in relation to deciding whether or not to run a rapid. A series of questions is presented for self-reflection. They, in essence, included:

What are the moves required to successfully run this rapid?

Am I capable of making all of those moves today?  
If I fail to make those moves, what are the resulting consequences?  
Am I willing to accept those consequences?

These principles will assist students and instructors in assessing various paddling situations and begin to make decisions accordingly.

## **Conclusion**

This is by no means a complete explanation of how to teach kayaking, but rather a few pointers and things to consider. There are many excellent instructors, friends, books, and videos to learn from. Learn as much as possible from others and be willing to spend the necessary time to perfect those kayaking skills.

## **Resources**

The following is a partial list containing some of the better kayaking books and videos that kayakers and kayak instructors may find useful in improving their skills. This list does not include books and videos covering the area of playboating.

### **Books:**

Ford, K., DeRiemer, P., & DeRiemer, M. (1998). The Kayaker's Playbook. Durango, CO: Performance Video.

*Note:* This book covers excellent skills and drills that can be used to fine-tune your paddling. It comes with a plastic crib sheet that you can take on the river with you while you work on perfecting your techniques. A must have!

Bennett, J. (1999). The Essential Whitewater Kayaker: A Complete Course. Camden, ME: Ragged Mountain Press.

*Note:* This is the text that we use when teaching academic kayaking courses. It is well written and adequately covers a wide range of information for the beginner, as well as the experienced boater. A good addition to any paddler's library.

Jackson, E. (1999). Whitewater Paddling: Strokes and Concepts. Mechanicsburg, PA: Stackpole Books.

*Note:* Eric does an excellent job in presenting kayaking skills and adding perspectives that most kayakers have not been exposed to. There is plenty to think about and to put into practice. This book is probably better suited for experienced paddlers looking to improve their skills than for the beginner.

Nealy, W. (1986). Kayak: The Animated Manual of Intermediate and Advanced Whitewater Technique. Birmingham, AL: Menasha Ridge Press.

*Note:* This classic book is humorous, as well as educational. Anyone who has read Nealy's book understands that there is far more to it than just cool cartoons.

Gullion, L. (1987). Canoeing and Kayaking Instruction Manual. Birmingham, AL: Menasha Ridge Press.

*Note:* This manual was written for and endorsed by the ACA for helping teach instruction techniques. Great information.

Gullion, L. (1996). Kayak & Canoe Games. Birmingham, AL: Menasha Ridge Press.

*Note:* This book is a companion to the American Canoe Association's Instruction Manual cited above. The games reinforce good paddling skills and help students to have fun.

Walbridge, C., & Sundmacher, W. A. (1995). Whitewater Rescue Manual: New Techniques for Canoeists, Kayakers, and Rafters. Camden, ME: Ragged Mountain Press.

*Note:* This text is comprehensive, easy to understand, and full of practical solutions to common mishaps that occur on the river. Another must have.

### **Videos:**

Ford, K. (1992). The Kayaker's Edge. Durango, CO: Whitewater Instruction.

*Note:* A classic in kayak instruction resources that is by no means outdated. The beginner and the 'expert' will both likely find room for improvement while watching this video. Works great in a classroom setting.

Holt, J. (1995). Kayak 101: Mastering the Basics. Joe Holt Productions.

*Note:* This video does an excellent job of covering eddy turns/peel outs and basic water reading. The straightforward nature of the presentation makes it easy for students and instructors to use.

Ford, K. (2000). Breakthru: Carving up Kayak Technique. Durango, CO: Performance Video and Instruction, Inc.

*Note:* This brand new video for intermediate and advanced paddlers provides 50 drills that will assist paddlers in mastering basic and advanced techniques. Provides insight into paddling today's shorter kayak. If you want to improve your technique, this is the video for you.

Whiting, K., & Emerick, C. (2000?). SOAR: Skills On All Rivers. Clayton, ON: The Heliconia Press.

**Note:** This video addresses paddling skills in relationship to improving strokes, creek boating, and big water paddling. Covers aspects specific to paddling newer, shorter kayaks. This video was created with the intermediate and advanced paddler in mind.

Bonesteel, P., & DeCuir, T. (1996). Essential Boat Control. Topton, NC: WaterWorks.

**Note:** This video is all about kayaking body language - the relationship between your body and your kayak. A wide range of eddy turn/peel-out techniques is addressed giving paddlers a whole new perspective on making your kayak do what you want it to. Best suited for the intermediate to expert paddler.

Ford, K. (1998). Whitewater Self-Defense. Durango, CO: Performance Video and Instruction, Inc.

**Note:** A practical, no-nonsense approach to addressing rescue techniques. The video essentially promotes using techniques, which are simple, fast to employ, and effective. The video does not address complex drag systems; it focuses instead on avoiding the problem in the first place and what to try before having to use complex systems. This is also, an excellent resource for teaching basic group management skills and self-rescue techniques.

### **Biographical Sketches:**

**Raymond Poff** is finishing a Ph.D. in Leisure Behavior at Indiana University. He is an Associate Instructor for the Department of Recreation and Park Administration, and also the equipment purchasing coordinator and an ACA Whitewater kayaking instructor for IU Outdoor Adventures. Prior to returning to graduate school, he was the Recreation Coordinator managing BYU Outdoors Unlimited in Provo, UT.

**Tom Stuessy** is the Assistant Leisure Programs Coordinator for the Indiana Memorial Union. He is an ACA kayaking instructor and recently began his coursework for a Ph.D. in Leisure Behavior. Prior to taking his current position, Tom coordinated the Freshman Wilderness Orientation Program at Western State College in Gunnison, CO. Tom is an avid skydiver and videographer and enjoys spending time in New Zealand.

### **For further information contact:**

Raymond Poff  
Indiana University  
Dept. of Recreation and Park Admin.  
HPER 133  
Bloomington, IN 47405  
E-mail: rapoff@indiana.edu

Tom Stuessy  
IU Outdoor Adventures  
900 E 7th Street - IMU 1st Floor  
Bloomington, IN 47405  
Phone: (812) 855-2231  
E-mail: tstuessy@indiana.e



# RE-CREATING THROUGH RECREATING INTO THE LATER YEARS

Mary Ann Kluge, Ph.D.

**ABSTRACT:** The demographic curve is changing in favor of the older population. While many people are uncertain what to expect of the aging experience, the general trend favors remaining physically, mentally, and socially active. Therefore, recreation leaders have a unique opportunity to positively affect the older population's aging experience. Not only are we able to provide older adults with opportunities to enjoy outdoor activities into the later years, recreation leaders can provide older adults with opportunities to better understand themselves through object lessons presented in outdoor settings.

*"The aging experience is a mystery to be discovered,  
rather than a fact to be assumed."*

~ Robert Atchley ~

## Introduction

We live in a culture that places little value on becoming old. If we want old age to be meaningful, there is value in developing an awareness of the aging experience. Being aware of the potential obstacles that lie ahead may help us create a positive experience for ourselves and others.

As we move into mid-life and the later years, many manifestations of ageism conspire to discourage us from aging "successfully". Myths and stereotypes about aging abound in our culture where speed, glitz, and profit are elevated over social values. Cultural messages like, "She's past her prime" and "You can't teach an old dog new tricks" are commonplace. These messages insinuate that once we are "over the hill" we no longer have the ability or motivation to extend the possibilities of our moving/aging bodies, our minds, or our spirituality. Fear that aging will be dominated by loss and suffering looms on the horizon.

However, aging is a natural process. We are all aging. Since birth, we experience changes in development. Later life is no different. With age-related changes comes some functional loss. However, people are not sick because they experience normal age-related changes (Hayflick, 1996). Furthermore, it is not chronological age that brands us "old". Rather, 'old' is an attitude (Kluge, 1999) and vulnerability to disease and disability has as much or more to do with cultural beliefs and lifestyle practices than genetic influences (Hayflick, 1996).

For the first time in history, there are more Americans over 50 than under 20 years of age. It is further estimated that the population over 65 will more than double by the year

2030. Specifically, between the years of 2010 and 2030 the over-65 population will increase by 73% compared to a 3% decrease in the under-65 population (U.S. Department of Commerce, 1993). Quantity of years however, does not necessarily mean quality of life and most people are interested in “compressing” their life expectancy -- they want to increase healthy years and decrease years spent ill.

“Successful aging” is multidimensional; it encompasses the avoidance of disease and disability, the maintenance of high physical and cognitive function, and sustained engagement in social and productive activities” (Rowe, J. & Kahn, R., 1997, p. 433). Our entrance into the later years can be graceful if we are conscious and realistic about aging. Learning to acknowledge and honor our needs without feeling diminished can be a means through which the later years can be lived fully and meaningfully.

### **Aging theory**

Theories of aging emphasize autonomy and connection, and stability and change to varying degrees. Some aging theories suggest psychological withdrawal and disengagement from life tasks. Disengagement theory holds that older adults naturally, willingly, fill fewer, more individualized roles and taper activities. This behavior results in “autonomous isolation” --decreased connection with people and the environment (except when physical limitations require assistance).

The Social Withdrawal theory posits that psychosocial pressures placed on “the elderly” by a youth-oriented culture marginalizes them. Rapid environmental change creates obsolescence. Social roles for older adults are reduced. Opportunities to affiliate are decreased. These conditions narrow older people’s “range of motion” – inhibiting autonomy *and* connection.

Whereby disengagement theory and social withdrawal theory’s postulates are organized around the concepts of autonomy and connectedness, Erikson’s Ego-Integrity theory is based on the assumption that the aging experience involves the continuity and preservation of mid-life ideals, meaning that stability is valued over change. Continuity of internal and external structures is maintained, in other words, people hold on to who they are, what they have, and what they know. “Backward integration” -- a fundamental acceptance of life within the same definition of the world before is Ego-integrity theory’s organizing principle. If stability is challenged, efforts are made to adapt -- to restore equilibrium.

Gerotranscendence theory on the other hand, emphasizes change and development throughout the lifecourse. Gerotranscendence theory’s tenets are that human aging, the very process of living into old age, is characterized by shifts of emphasis and redefinitions of the self and social relations. The process of gerotranscendence implies a deeper relationship with the self -- a discovery of both good and bad aspects, and a decrease in self-centeredness. Social relations are characterized by “selective investment” -- an increase in the need for solitude and a shift from superfluous social interactions to more meaningful connections. Selective investment increases autonomy and could be viewed as similar to

the increased autonomy that characterizes disengagement theory and social withdrawal. However, while disengagement is a turning inward, gerotranscendence is characterized by moving forward and outward (Shroots, 1996). Gerotranscendence theory has a cosmic dimension as well. Rather than integrating elements of the past, gerotranscendence implies a "redefinition of reality" with a more cosmic outlook. There is a shift in the perception of time and space, changes in the meaning of life, a disappearing fear of death, and an increase of communion with nature and the universe.

### **Personal Growth through Adventure**

Outdoor education broadly includes education in, about, and through outdoor experiences (Council on Outdoor Education Position Statement, 1989). Specifically, adventure education focuses on learning through participation in "initiatives" or "challenges" in outdoor settings (Rohnke, 1989). In adventure education, the emphasis is not on the mastery of skills but on the process of how participants feel about the activities they do and ideas they have about how their new learning might transfer into "real-life" settings (Bunting, 1989).

Kiewa (1994) suggests that adventure education offers "tremendous potential for personal development" (p. 30). Four components of an Adventure program influence the potential for positive effect: 1) an experiential approach, 2) a simple and meaningful reality, 3) the need for cooperation, and 4) intensity of feeling about the experience (Kiewa, 1994). Processing the experience, having a successful experience, challenge by choice, and a humane climate are also important elements.

An experiential approach requires learners to first *do* or *experience* something – then, to reflect upon the experience. Reflecting on experience brings about personal realizations and in-depth understanding of underlying concepts or guiding principles (Kiewa, 1994).

Simplicity of the outdoor environment contributes to learning effectiveness as well. Basic needs -- to eat, to be warm and dry, to have shelter -- are important in the outdoors. Tasks are clear and meaningful; feedback is unambiguous.

Cooperative effort is an additional feature of Adventure education. Successful completion of initiatives is usually dependent upon others. To identify personal and group strengths and entrust one another with one's "life" can provide a vital growth experience seldom encountered in the "outside" world.

Women's experiences with adventure education do not emphasize mastery over the environment. Rather, the inner journey of self-awareness and control are the focus. Kiewa (1994) believes that the perceived and real dangers which are a part of Adventure education create an intensity of feeling that can positively influence learning and promote group bonding. "The release from tension which accompanies the successful confrontation of a challenge engenders an intense feeling of elation. To feel safe brings with it a sense of relief which does much to restore a sense of balance and proportion to our lives" (Kiewa, 1994, p. 32). Learning takes place even when "failures" occur. It is

important though to create situations that pose a challenge but are not viewed as dangerous to the emotional or physical safety of the participants. "Challenge by choice" is encouraged (Rohnke, 1989). Challenge by choice enables participants to increase their feelings of self-control. Self-control in this context does not mean denying one's feelings or denying self to serve others. Self-control in this context is that which "arises from understanding and acceptance of one's self and one's needs" (Kiewa, 1994, p. 39).

To process adventure experiences with full value, some form of "debriefing" should be organized after the Adventure activity (Rohnke, 1989). The structured nature of processing the experience transforms the activity into a true educational experience. Participants share what happened, what they discovered and felt about the experience, and how their new learning might integrate into their lives. Providing optimal conditions for growth is achieved by the creation of a "humane climate". Factors such as respect -- for self and others, having opportunities for input, growth and renewal, cohesiveness and caring are considered "humane" in adventure education (Kiewa, 1994).

### **The Women We're Becoming: A Workshop about Aging**

The "Women We're Becoming" workshop was designed to explore the personal and social aspects of the aging experience for women. How to make meaning of our transition into old age was the focus of our time together. I was interested in seeing how women would respond to discussions about aging and ageism and to Kiewa's Personal Growth through Adventure model.

The workshop was designed for women only. While growing old is to experience the changes that all aging persons encounter, there are many changes that are unique to women in our society. The combination of different physiological potential and gender socialization requires women to confront different personal and social problems and have a different set of personal priorities that most men do. Women not only experience a number of life events that are different from those men encounter, women experience the same events -- such as work, retirement, and family life -- in different ways.

Workshop activities were designed to create an awareness of women's strengths and to provide information that may help women locate self-worth and maximize resources in a culture that places little value on old age. Pre-workshop assignments (reading and reflection) provided a means to stimulate the participants' thinking about aging and offered content for "classroom" discussion.

"Classroom" sessions were intended to help participants put ageism into perspective -- to release from the self-denigration it may be creating, to raise self-esteem, and to increase awareness of the competence and capacities of older women. Discussion centered on successful aging -- recognizing that both stability and change occur over the lifecourse and that being conscious of the importance of accepting life's limits and developing a holistic "life portfolio" can help maximize the gift of long life.

An outdoor challenge course experience using selected low elements -- which encouraged an understanding of aging "issues" and emphasized group process was designed. High elements -- which focused on self-control and how to receive support, were available for participants who wanted to "step beyond". Initiatives and challenges such as: Stepping Stones, Hog Call, The Maze, Bull-in-a-ring, and the Balance Log among others, created opportunities for the participants to surface thoughts and feelings about themselves and the aging experience. "Challenge by choice" under girded all activities.

Understanding themselves and the world in which they live enabled the participants to challenge established norms and narratives about aging and to actively construct new images and possibilities for accommodating -- and even appreciating the aging experience. Participants reported gaining a sense of competence and control. In addition, they developed trust in themselves and one another. "I'm not the woman I was", "I'm no longer terrified of aging", "I know my limits", and -- "I can decide what to do, what not to do... and how to ask for help" are examples of the comments that were expressed during and/or after the activities.

## **Conclusion**

The age pyramid has been turned upside down. Not only are people living longer, but also, the percentage of the population over 60 years of age has increased dramatically. However, we are experiencing a "cultural lag" in understanding the aging experience. Institutions are not in place to meet the needs and interests of the older population; there are no models to learn from. Yet, outdoor education and recreation professionals can play a significant role in making the later years enjoyable for older people. While there is no template for service delivery, providing as custom a fit as possible is highly recommended. The workshop "The Women We're Becoming" is an example of providing an opportunity for women to be conscious of their own aging through adventure education. The outdoor setting offered women the opportunity to get away, to connect with nature. Kiewa's Personal Growth through Adventure model de-emphasized the idea of control over the environment and focused on self-control through self-awareness. The experience was powerful -- and lasting. Part 2 is scheduled this spring!

*And who knows how life at the last may show?  
Why, look at the moon from where we stand!  
Opaque, uneven, you say; yet it shines,  
A luminous sphere, complete and grand.*

~Phoebe Cary~

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### **Biographical Sketch:**

**Dr. Mary Ann Kluge** is an associate professor in the School of Physical Education at Pacific Lutheran University in Tacoma, Washington. She teaches and advises pre-service teachers and future recreation leaders; her research and writing focuses on special populations. Mary Ann has recently completed her doctoral studies in gerontology, with special emphasis on health promotions and women's studies. Her dissertation research explored "Understanding the Essence of a Physically Active Lifestyle for Women 65 and older." Mary Ann has also recently piloted her workshop called "The Women We Are Becoming," the content of which is being offered in her presentation titled: "Re-creating through Recreating in the Later Years."

### **For further information, contact:**

Dr. Mary Ann Kluge  
Pacific Lutheran University  
School of Physical Education  
Olson Auditorium  
Tacoma, WA 98447  
Phone: (253) 535-7372  
Fax: (253) 535-7584  
E-mail: (253) 535-7584



# THE IMPORTANCE OF MANUALS IN THE UNIVERSITY OF WISCONSIN AT STEVENS POINT'S OUTDOOR PROGRAM

**Kate Skroski  
Emily Cook**

**ABSTRACT:** The Outdoor Program at UWSP is primarily student run. We have one full-time staff member whose time is split between ours and two other non-related programs. The student-staff who are employed there often are only there for one or two years and this leads to a great deal of turn-over every year. In addition to staff turn-over, there are four students who are considered supervisors over the rest of the staff. It is rare for someone to have a supervisory position for more than two or three semesters, so in addition to turnover within the staff, there is also a great deal of turnover in leadership. All of these issues lead to a need to have manuals that are set out to outline policies and procedures to ensure that everything is run smoothly. At UWSP we currently use four manuals, a Staff Manual, a Policies and Procedures Manual, an Equipment Manual, and a Trip Manual. These are all updated every year and are looked over carefully after any turnover of staff.

During this program we also discussed the three aspects of our program: equipment rental, guided trips, and weekly skills courses. In the next few semesters we are hoping to have a manual for all of these three aspects as well as for each of our supervisory positions.

Our Manuals can be accessed after December 22<sup>nd</sup>, 2000 at <http://www.uwsp.edu/centers/recserv/>

## **Biographical Sketches:**

**Emily Cook** is the Student Manager for the UWSP's Recreational Services. She has worked at Recreational Services for one year while studying Social Science. Her other outdoor recreation experience ranges from selling gear at an outdoor store to co-writing a camp program for adolescents with a focus on using outdoor experience to build solid leadership skills at an environmental education camp in Colorado.

**Kate Skroski** is the Promotional Coordinator for Recreational Services at UWSP. She has worked at Recreational Services for three years while going to school for a degree in Biology. She also has experience from two summers on the program staff at a camp in Northern Minnesota where she was responsible for a wide variety of activities in helping families explore the Boundary Waters Canoe Wilderness Area.

**For further information, contact:**

Emily Cook and Kate Skroski

Recreational Services- UWSP

401 Reserve Street

Phone: (715) 346-2010

Fax: (715) 346-4710

E-mail: [ecook087@uwsp.edu](mailto:ecook087@uwsp.edu)

E-mail: [kskro329@uwsp.edu](mailto:kskro329@uwsp.edu)

## MARKETING OUTDOOR PROGRAMS A Roundtable Discussion

Tom Stuessy

**ABSTRACT:** This roundtable discussion focused on marketing outdoor programs on college campuses and endeavored to illuminate avenues to compete for limited student resources. While universities and colleges across the country provide increasing options for student development, being noticed on college campuses, as an extra curricular entity becomes a task that takes a lot of time, money, and savvy. Topics such as catalogs, advertising versus marketing, and internal versus external marketing management were covered. Those in attendance presented many good ideas.

### Discussion

College outdoor programs need to distinguish “marketing” from “advertising”. Very few programs on college campuses actually market. A flyer in a dorm, a follow-up post card, or a table at a special event is not marketing, it is advertising. In order to achieve marketing, a plan must be devised with a strong marketing mix and sticking to what has worked and abandon what has not. Sit down with a blank calendar and your budget. Write in dates and avenues to market certain trips or events. Be sensitive to the time of year with your plan and use your demographic surveys to tell you where your limited resources are best spent. After all you took the time to write, print and use it in pre-trip meetings, right? Once you have a firm idea of when and how your dollar will be spent, get it on paper and follow it through; this is a marketing plan.

Many programs face situations that inhibit their advertising and marketing efforts. For example, catalogs are outsourced and the message is lost due to the marketing agency’s “creativity” or limitations with budgets. When is a good time to try something new with limited resources? When should you abandon a marketing avenue that has had limited success? We know the best advertising is a satisfied customer. How do we get them on that first trip?

It has been very effective for many programs to bring someone onto their staff who can serve as a gear manager, trip leader or front desk staff who also is seeing marketing efforts through. His/her job is to collect demographic surveys, enter data into database, and monitor the marketing plan. A student who is a marketing major and who loves the outdoors is a dream come true.

Strategies presented during the discussion for advertising included:

- Using flyers to advertise only one or two trips per flyer
- Assigning a student group/organization to each trip for targeted advertising
- Contacting residential advisors for dorm trips by floor
- Using special events to display available gear to rent
- Discounts and other trip registration specials

- Using computer data bases to track customer preferences differentiating time of year, activity, length of activity, location, and cost of activity
- Follow-up post cards thanking customer for their business and advertising another trip or a registration discount
- Collaborative efforts such as attaching flyers to a local pizza delivery business. "Redeem this coupon for a 10% discount on any adventure trip"
- Raffles at social functions
- Utilizing the university/college radio station.

It was agreed that accurate tracking and demographic surveys were important to discover advertising success. While this may seem obvious, not all programs represented did so. Microsoft applications Excel and Access can handle this function.

An activity that reaches many people at once is team building. If facilitated correctly, a group of twenty satisfied customers goes a long way for free advertising. In the spring of 2000, Indiana University Outdoor Adventures surveyed 103 students to find out how they heard about the program. Thirty-nine percent of them responded that they were made aware by word of mouth. Other larger group activities include chartering buses for rafting trips with sororities and fraternities and other student groups. "Group Polarization" has a dramatic impact on how potential risk is perceived for those first timers (Wallack; Kogan & Bem 1962).

The Internet has had a dramatic effect on how we college outdoor programs reach potential customers. By using email we can notify staff, but also solicit participation from those who otherwise may not even know the program existed. Some campuses have very strongly governed email usage and general emails may not be an option. Other potential uses are on-line registration, equipment reservation, and listed web addresses so potential participants can see features of a particular trip location (Poff, 1999).

Demographic surveys were collected from 103 participants who participated in trips operated by IU Outdoor Adventures during the spring 2000. An example of the survey is attached as well as how we categorized the numbers into ten different fields. Demographic surveys are critical to your marketing plan. It will help evaluate what you have done as well as plan for the future. Items such as the average age, residence, and year in school can be useful information when channeling your marketing dollar.

## **Conclusion**

Marketing college/university outdoor programs is a challenging task considering the choices that are made available to today's college student. While some marketing principals seem to still have a dramatic effect, i.e. word of mouth, other new trends are emerging. The use of venues that utilize computers have high traffic and visibility. At the same time, the computers themselves have grown to have an important role. The ability to reach hundreds of people at once is an advantage. Computers can eliminate

wasteful flyers, reach more people faster, and give potential participants a chance to really "see" the action.

Outdoor programs must gain an understanding of the difference between marketing and advertising. Taking the time to sit with a budget and potential avenues of advertising at the beginning of each semester would give a clear picture of when and how limited advertising dollars can be spent. It is important to follow through with the plan and analyze the demographic surveys.

Further investigation of this marketing is in order. There is a limited body of research explaining how students respond to recreation advertising on a college campus. A better understanding would increase efficiency in which information was disseminated and save money and time.

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### **Biographical Sketch:**

**Tom Stuessy** is the Assistant Leisure Programs Coordinator for IU Outdoor Adventures. Tom is an ACA kayaking instructor and recently began his coursework for a Ph.D. in Leisure Behavior. Prior to taking his current position, Tom coordinated the Freshman Wilderness Orientation Program at Western State College in Gunnison, CO. Tom is an avid skydiver and videographer and will be spending his second winter in New Zealand shooting video, ice climbing and paddling.

### **For further information, contact:**

Tom Stuessy  
Indiana University Outdoor Adventures  
900 E. 7<sup>th</sup> St. – IMU 1<sup>st</sup> Floor  
Bloomington, IN 47405  
Phone: (812) 855-2231  
Fax: (812) 855-8697  
E-mail: [tstuessy@indiana.edu](mailto:tstuessy@indiana.edu)

## INDIANA UNIVERSITY OUTDOOR ADVENTURES

Please take a few moments to complete this survey. Your input is greatly appreciated!

1. Your year in school is...

Freshman       Sophomore       Junior       Senior  
 Grad/Ph.D.       Faculty/Staff       IU Alumni       Community resident

2. Your gender is...  Female       Male

3. Your age is...       18-22       23-29       30-39       40-49       50+.

4. Your ethnic origin...

African American       Asian or Pacific Islander       Hispanic  
 Native American       Caucasian (white/non-hispanic)

5. Category that best describes your residence is...

Residence Hall       Fraternity/Sorority       Off-campus apartment  
 Surrounding Community resident (specify) \_\_\_\_\_

6. How did you **first** hear about the IU Outdoor Adventures?

Indiana Daily Student       Word of mouth       IU Outdoor Adventures catalog  
 Radio Advertisement       Television Advertisement       Billboard  
 Freshman Orientation       Add Sheet       Flyers  
 Herald Times       JL Waters       Other (bus cards, flyers, etc.)

7. Do you have any ideas on improving IU Outdoor Adventures publicity efforts?

Yes       No      If yes, please share your ideas: \_\_\_\_\_

8. Which of the following IU Outdoor Adventures programs are you aware of? Check all that apply.

Adventure Trips       Skill Courses       Outdoor Equipment Rental  
 Resource Library       Team Building

9. Have you ever participated in an IU Outdoor Adventures program before?

Yes       No      If yes, please name: \_\_\_\_\_

10. If you have not participated in IU Outdoor Adventures programs prior to this one, please indicate your reasons. Check all that apply.

not interested       not enough experience       too structured  
 too expensive       no friends to go with       didn't know about it  
 not enough time       other (please explain) \_\_\_\_\_

11. What additional trips and/or skill courses would you like to see IU Outdoor Adventures offer?

12. What additional outdoor equipment rental items do you feel IU Outdoor Adventures should rent?



**IU Outdoor Adventures Survey results**  
**Spring 2000 Trips and Courses**

1. Your year in school is...

Frosh	9	103	9%
Soph	24	103	23%
Junior	22	103	21%
Senior	30	103	29%
Grad	8	103	8%
Faculty/Staff	4	103	4%
IU Alumni	1	103	1%
Com. Resident	5	103	5%

2. Your gender is...

Female	53	103	51%
Male	50	103	49%

3. Your age is...

18-22	74	97	76%
23-29	13	97	13%
30-39	5	97	5%
40-49	5	97	5%
50+		97	0%

4. Your ethnic origin...

African Amer.		97	0%
Asian/Pacific Is.	3	97	3%
Hispanic	6	97	6%
Native Amer.		97	0%
White	88	97	91%

5. Category that best describes your residence is...

Res. Hall	26	103	25%
Frat/Soro	15	103	15%
Apartment	43	103	42%
Community	19	103	18%

6. How did you first hear about the IU Outdoor Adventures?

Catalog	38	103	37%
Flyers	1	103	1%
Fresh Orient	3	103	3%
Billboard	1	103	1%
IDS	13	103	13%
Herald Times		103	0%
TV Ad		103	0%

Radio Ad		103	0%
JL Waters	2	103	2%
Word of mouth	40	103	39%
Add Sheet		103	0%
Other	5	103	5%

7. Do you have any ideas on improving the IU Outdoor Adventures publicity efforts?

Yes	8	84	10%
No	76	84	90%

Res halls x 3  
 Frats and Soro x 2  
 Website x 3  
 Other IU Campus

8. Which of the following IU Outdoor Adventures programs are you aware of?

Adv. Trips	96	103	93%
Skill Courses	55	103	53%
Team Initiatives	22	103	21%
Equip Rental	73	103	71%
Res. Library	15	103	15%

9. Have you ever participated in an IU Outdoor Adventures program before?

Yes	26	99	26%
No	73	99	74%

10. If you have not participated in any IU Outdoor Adventures programs prior to this one, indicate your reasons.

no interest	2	97	2%
too expensive	16	97	16%
no time	30	97	31%
no experience	4	97	4%
no friends	5	97	5%
too structured		97	0%
didn't know	34	97	35%
other	6	97	6%

from out of town or other IU campus x 3

11. What additional trips would you like to see?

sailing	rock climbing	mountaineering	sky diving x 2
ww rafting	hiking	more kayaking	sail boarding
horseback riding	Mt. biking	dogsledding	

12. What additional rental equipment would you like to see?

x country skis x 2

## MANAGING FIELD EVACUATIONS

(Reprinted with permission from The Outdoor Network, Winter 1999/2000 Vol. 10, No.4)

**Jay A. Satz  
David McEvoy  
Kurt A. Merrill**

If you work with a quality outdoor education service or adventure program - whether you are a professional outdoor leader in the field or an administrator - your utmost priority is the safety and well being of every student and staff member. As a result, a large portion of your organization's planning time and training is devoted to anticipating and preventing incidents, and developing emergency response systems and plans should an emergency evacuation become necessary for one of your programs or courses. But as we all know, despite being diligent, "stuff" happens.

Many of us in the "industry" have gained significant experience in emergency response in outdoor settings through work with local search and rescue organizations, federal professionals in the National Park Service, US Forest Service, or working with ambulance services. All these outfits provide quality services that have been responsible for saving many thousands of lives, using time tested protocols and procedures that guide the rescuer in the performance of her or his service.

One of our greatest challenges in this business of outdoor programming however, is that it is often difficult to put up "the wall of professionalism" that separates us from the human drama, trauma and sometimes tragedy of the situation we are responding to. The reason this happens, of course, is that rather than coming to the aid of patients we have never met, the patient will likely be a member of our group of wilderness travelers, and perhaps even a colleague or long time friend. And, we may in fact, like many outdoor leaders, be responsible for a decision that led to the original incident.

Despite the fact that the heightened standards in risk management and prevention programs now prevalent in our industry have reduced the number of incidents per participant days, statistics and experience tell us that incidents still will occur. In the event of a debilitating injury or illness, regardless of our relationship to the patient, there are four critical phases that outdoor leaders should consider to successfully manage backcountry field evacuations. These guidelines are borrowed in part from the Wilderness Medical Society's Practice Guidelines, edited by W.M. Forgey, M.D.

- Manage the incident to minimize risk to the remaining party and to provide appropriate patient care.
- Determine the most appropriate evacuation response to the incident.
- Transfer patient care to third party rescue personnel (if not performed by your own organization).

- Manage stress during and after the incident to improve your success rate for all of the points above.

The following sections will highlight strategies and actions you should consider in managing evacuations to meet the above goals.

### **Managing The Immediate Scene**

"Don't just do something...stand there!"

Safety is your number one priority. But you must stop and assess the scene before you assess the patient(s). Before you touch your patient, ask yourself four questions: What happened? Are you safe? Is the rest of your group safe? Is the injured/ill person in a safe environment? Think before you act. As soon as patient care begins, your ability to assess the larger scene for safety and mechanism of injury is greatly reduced by your specific focus on the patient.

Despite both your training and experience, managing a critical scene is very stressful and can be overwhelming. Imagine how you would feel if you were group leader of young adults and your route choice proved to be unsafe and led to the injury of two of your students. Unlike rescue personnel who maintain a level of "distance" from an anonymous patient, outdoor leaders typically know and are responsible for their patients. Another critical factor in this scenario is the possibility that, in some instances, the leaders may have played a role in causing the initial incident. It would be easy to become totally overwhelmed at such a moment.

The leader must be able to control these emotions in order to focus on the important issues of the moment - assuring scene safety, medical care of the patient, instituting the emergency response plan, and providing for the needs of the uninjured group members. Distracting emotions and concerns need to be moved into the "To Be Dealt With Later" file. These might include-though not limited to-pity or fear, thoughts about the long-term outcome of the illness or injury, guilt and feelings of personal responsibility, and the potential for professional and legal consequences. Although you must deal with these issues at some point after this critical stage, for now you need to concentrate on more immediate needs. By recognizing that these concerns will loom up in the midst of your initial response and anticipating them as absolutely normal and appropriate, you will find it easier to focus your energies on the task at hand.

### **The Evacuation Spectrum**

"Today is a good day to get hurt!"

As a leader you should be able to wake up and say "this is a good day for me or a member of my group to get hurt. My group is healthy, well fed, well hydrated, in good spirits, and we have a well thought out emergency response plan should something go wrong". If you cannot say this at the beginning of each and every day, then as a leader,

you need to address and correct this problem. As a leader, remember to focus on injury and illness prevention.

Your main objective is obviously to prevent accidents and illness so that incidents and consequently, evacuations, become unnecessary. Fortunately, most injuries and illnesses are minor and can be addressed and treated in the field. However, there is a second, more subtle, level of prevention that needs to occur to prevent the injury or illness from progressing from the left side of the evacuation spectrum to the right side (see below). For example, by continuing to assess and treat an injury as simple as an infected blister you may be able to walk your patient out rather than having them become weakened through a progressive infection. It is important to continue concentrating on this second level of injury and illness prevention after the initial incident has occurred to keep the injury/illness from progressing.

### Evacuation Spectrum

No Evacuation Necessary ->Self and Assisted Evacuation -> Simple Carry ->Litter Carry

There are many variables to consider as you assess backcountry emergencies. We will cover some evacuation criteria later, but these criteria must be evaluated within the context of the evacuation spectrum. The spectrum's first category is "No Evacuation Needed". You make this decision after determining that you can handle the situation where you are.

The second category is "Self and Assisted Evacuation". Here the patient can self-evacuate with little or no help. An example is a patient with an early urinary tract infection (UTI) who is ill but still able to walk (ski, paddle, whatever) out of the backcountry.

The third category is "Simple Carry". This same patient becomes too weak to walk, but is strong enough (and the terrain forgiving enough) to be carried out by one or two team members. This evacuation will be slower than the "Self and Assisted", and is the first category where we really begin to worry about rescuer and patient safety (particularly falls and back injuries). This method is obviously not an acceptable choice for any patient needing cervical spine protection during transport.

The fourth and final category of the evacuation spectrum is the "Litter Carry". The patient is now too weak to hold on for a carry, is unresponsive, or needs immobilization to protect known or possible fractures. Litter carries are fraught with peril and should be avoided whenever possible. They are time consuming, expensive (in terms of resources), and dangerous for all involved. So that you do not underestimate what a litter carry involves, consider this:

You would need to have six to ten people carry the litter, depending upon the size of the patient and rescuers, and the nature of the terrain to be covered. You would optimally have a person in charge, directing the carriers. Even under the best of circumstances, progress will be very slow and rescuers will become fatigued. Under difficult circumstances - a large patient, only six rescuers, bad weather,

steep, rugged terrain - progress will be extremely slow and rescuers will soon become exhausted. Exhausted rescuers bearing a load over uneven terrain are at high risk for injury. Finally, it is extremely difficult to provide ongoing medical care to a patient being carried in a litter. From airway management to assisting with vomiting, all patient management interventions are complicated under these conditions.

A final note here is that significant outside intervention- specifically life flight or other helicopter support-falls in at this end of the evacuation spectrum as well. Flights offer incredible support under the right circumstances, and usually bring the patient into the realm of increased medical care quickly. They are, however, extremely expensive, and more importantly, not always available due to weather, darkness, landing zone considerations, commitments to other duties, or restricted access in designated Wilderness areas. When they do fly, they are also putting additional personnel at increased risk.

Two important points need to be made as one evaluates the situation relative to the evacuation spectrum. First, this is a dynamic process. We manage evacuations the same way we manage the medical care of patients: we assess, intervene, then re-assess. Leaders must be flexible and not blindly adhere to a plan because "that's what we decided." The plan may be altered as the patient's condition and/or backcountry variables (weather, etc.) change.

Second, when in doubt, get the patient out. Whenever possible, stay on the left side of the spectrum (where no carries are involved). It is inevitable that some patients, by virtue of the illness or injury suffered, will require a litter carry. It is sometimes unavoidable. What you want to avoid is staying in the backcountry with a sick or injured patient (who yesterday could have walked out) whose condition deteriorates, and now must be carried out.

Once the decision to evacuate is made, there are a number of inter-dependent variables to consider, each of which may hasten, postpone or change the method of evacuation. One of your first considerations should be an evaluation of the weather. You may have everything in place for your group to litter-carry your head-injured patient off a high mountain ridge. But if three inches of wet snow fall, making the already loose scree wet and slippery, you might want to reconsider your decision. Depending on terrain and your distance from civilization, deteriorating weather can make you want to go, or stay. You may think, "the weather is closing in, so we'd better get out of here while we can." Or, you may think, "with this weather closing in, we'd better sit tight until things clear." It depends on your patient's condition, the terrain, and your location.

You must also consider the skills of other members of your group, as well as available equipment. If no one knows how to construct a litter, or if materials are not available, another plan must be considered. The more subtle assessment is the mental and physical readiness of the members. If some are physically exhausted or mentally distraught, they probably should not embark upon an arduous litter-carry.



## **Evacuation Criteria**

Making the decision to actually evacuate is a challenging one, so it is helpful to have set criteria to compare to the variables of your specific situation. We have placed reasons to evacuate into eight categories, as outlined below.

**Immediate Threats to Life:** These include patients with an unmanageable airway, acute respiratory distress (struggling to breathe, cannot sleep or are awakened due to shortness of breath, or have difficulty breathing while at rest), signs and symptoms of shock, and/or those with a deteriorating level of consciousness.

**Immediate Threats to Limb:** These include patients with severe orthopedic trauma (any fracture or any injury resulting in the loss of distal circulation, movement or sensation), suspected spinal trauma, and/or significant blows to the head (leading to changes in the level of consciousness).

**Malaise:** This includes patients with signs and symptoms of progressive infection (increased redness, pain and swelling, "streaking" in lymphatic system towards the heart, fatigue, significant fever, swelling in lymph glands). Other symptoms include the inability to tolerate oral liquids for more than twelve hours, true diarrhea for more than twelve hours, signs and symptoms of dehydration (weakness, headache, lethargy, dry mucus membranes, low urine output, dark urine), and progressive or unexplained weakness (dehydration, infection). A final concern is significant fever, defined as any fever at all over 102 degrees F, or any fever over 100 Degrees F for longer than twelve hours.

**Pain:** This includes severe pain with a sudden onset that is constant or getting worse or any significant pain that does not abate after twelve hours. Other concerns include abdominal pain accompanied with signs and symptoms of shock, females with unexplained abdominal pain, and any chest pain that you fear might not be from musculo-skeletal origin.

**Cosmetics:** This is an area that is not often considered, but leaders and organizations, especially those serving young clients, should be particularly concerned with injuries that could potentially scar and/or limit function. This is particularly challenging because of the "teenager immortality factor." Occasionally, teens do not care about small scars of the face, head and neck and will resist evacuation. Since timely closure/plastic surgery does, in some cases, reduce scarring, we must remember that their parents might care very much. Consequently, we urge you to strongly consider evacuating those patients with potentially scarring injuries of the face, head and neck and/or potentially scarring injuries to joints.

**Mechanism of Injury:** It is crucial that providers understand the importance of this category. Young, healthy people (frequently those we deal with in the backcountry) often tolerate trauma well. They can be suffering significant internal bleeding (especially from

blunt trauma to the head, chest and/or abdomen) even though the initial exam might show only minimal signs of injury. The patient may be able to compensate for many hours before external signs of distress are visible, during which time a valuable opportunity to evacuate may have been lost. Examples of mechanisms of injury necessitating evacuation even in the absence of signs or symptoms of distress include any fall greater than fifteen feet, any other "significant fall", factoring in which body parts impacted and upon what type of surface, and any trauma that results in any loss of consciousness.

Psychological: Evacuate any member of the group that poses a threat to themselves and/or to others. Unstable group members can cause crises all on their own, and can make dealing with other emergency situations that arise much more difficult. You should usually consider other behavioral and discipline issues under this category as well.

Other: This includes patients with suspected (but not obvious) fractures, and wounds with progressive infection. Burns are almost in a separate category. You should consider evacuation for burns to hands, feet, face or genitals, 2nd degree (partial thickness) burns over more than 1% of the patient's body surface area (an area equal to the size of the palm of the patient's hand), and any 3rd degree (full thickness) burn.

### **Evacuation's Golden Rules**

Above all, when assessing whether an evacuation is necessary, consider these four "golden rules" for making the "Go" decision to evacuate:

- Think. Evaluate the scene for potential dangers and the mechanism of injury. Assess your patient(s). Consider all variables. Then make a plan.
- Use your gut instinct (and err on the side of caution). Trust your gut instinct and your medical training. Do the pieces add up? How does the person look?
- Do it sooner rather than later. Once you make the decision to cross the threshold and evacuate, do it sooner rather than later. Do not allow a person to become incapacitated before you make the decision to evacuate.
- Do not rush. Although you should follow the "do it sooner" rule, once you make the decision to evacuate, delaying the evacuation by a few minutes most likely will not change the outcome. Take time to educate your group, gather materials, and execute your plan. Do not create more patients or exit the scene with insufficient information by rushing your evacuation.

### **Transfer Of Patient Care**

The end goal of evacuation is transfer of the patient to professional rescuers (Search and Rescue, ground or air ambulance crews, or clinics). This transfer goes more smoothly for all parties involved (your group, the rescuers, and the sometimes-forgotten patient) if a few general guidelines are followed. First, whenever possible, designate a leader who will be the main communicator, and have that person speak with the rescue team leader.

This greatly simplifies what can be a very confusing interface. Also, having a concise, legible written report is extremely valuable.

This can be a difficult time emotionally for your group. Your members will have invested much of themselves in this process. It is difficult to let go of the patient, even when you are convinced that the patient's needs are being met. The transfer leaves a void. Offer your group's help with logistics, but realize that your help may not be needed at this time. Tell them everything you want them to know. They may be in a big hurry, but this is probably your last chance to tell your story, so if you have important information make sure it gets relayed.

This sense of separation can be especially troubling if your group members have concerns about the abilities of the rescue team. Often, these concerns are actually about communications issues that are easily resolved by slowing the quick pace of action to clearly communicate your expectations. This is of particular importance if the patient is a minor, for whom you (or your organization) hold *en locus parentus*, i.e., legal authority over that minor patient's care. Knowing where the patient is being taken for treatment for example, is something rescuers don't always view as an important item for you to know versus getting that patient out of the mountains quickly. But it obviously remains important to you.

Occasionally, there may be very legitimate concerns that the transfer may actually result in a decrease in the level of medical care your patient will be receiving. You may determine that you have greater experience, and/or hold a higher level of medical certification. If, as leader, you feel that the rescue group cannot meet your patient's needs, then you will have to be creative. Options to consider include accessing another rescue group, continuing the transport yourselves, or pooling resources with the rescue team (recognizing that you cannot abandon your group without leadership). Either way, the leader can expect the members of the group to experience a sense of loss at this time. Try to anticipate and be sensitive to this. If your perception is that there are frustrations and anger amongst members, it might be best to let matters settle for a while before addressing them. But if people seem generally satisfied with the intervention, but sad at the transfer of responsibilities, it might be a good time to take a break and talk about things. Whether the patient outcome is positive or not, the astute leader will recognize that people will need to talk about the events, and that the timing of the conversation can be as important as the content.

Finally, even under the best of circumstances, with a strong and confident team coming in, you still need to consider your responsibility to the patient. If you have a leader to spare, she or he should most likely accompany the patient out. Once the rescue is complete, the patient (perhaps a minor) may be alone in a hospital far from home, in need of an advocate. Your organization may also be able to provide this support, or you may not be in a position to leave your group, but you should also be thinking about what happens once the patient is successfully extracted from the scene.

## **Managing The Rest Of Your Group**

Even as the patient faces a debilitating or perhaps life threatening injury or illness, you are still responsible for providing leadership for the rest of your group. It is important that both the injured person and the rest of your group see that you are in control of the situation and not being controlled by it. In the midst of the tremendous stress of such a situation, remember to care for yourself as well. Once the injured person is stabilized, calm and comfortable, you may want to step away for a moment to give yourself space to plan what you will do next.

You need to consider several things at this point. First, the members of your group are now prime candidates for becoming additional patients if you are dealing with an unsafe scene or other significant unfavorable environmental factors. Second, this group is a potential treasure trove of assistance to both you and the patient. Finally, individuals in the group may be in a better position to see the precariousness of the situation, and thus are equally, or in some cases, more susceptible to stress than the patient. It is extremely important that you share your confidence in both their ability and your own to successfully handle this situation. Be as upbeat as possible, but also be truthful.

If possible, from a pragmatic and emotional safety standpoint, involve your group in administering first aid and evacuating the injured person. In doing so, you will begin to relieve their stress. If you have discussed safety and your emergency response plan, they will be mentally prepared to pitch in. Involve members who do not appear to be comfortable working with or near the patient with setting up shelter, preparing and distributing food and water, or other such tasks. If anyone on site becomes a nuisance rather than helpful, direct him to perform another task unrelated to the first aid/evacuation. If you suspect he may be suffering from emotional shock, have him work with a partner who can keep an eye on him. Managing stress in the patient, yourself and the rest of the crew may be the hardest and most important thing you do to ensure a smooth evacuation.

## **Managing Stress - In The Field**

Perhaps the most sincere and oft spoken lie to pass the lips of an outdoor leader in crisis management mode is "I'm okay". The leader(s) job is to take care of everyone, including him or her self. Maintaining the perspective discussed earlier about time appropriate concerns versus immediate needs can help control stress in the midst of the incident response.

While you are still in the field, pay attention to basic needs. Shelter if necessary and hot food and drinks, if possible under your circumstances, can really help alleviate anxiety. Laughing and joking (sometimes necessarily out of earshot of the patient, and sometimes involving the patient) may seem macabre to some, but it also stimulates endorphins, as well as a sense of perspective that is calming. Playing Hacky Sack or Frisbee, or simply reminding people that it is okay and appropriate to continue to appreciate and be in awe of their surroundings does wonders to reduce stress.

If you are fortunate enough to be in contact with the outside world via radio, cellular or satellite telephones, this will often help you manage your own stress, and it will certainly be a great source of comfort to both the patient and the rest of the expedition. But it can also be a double-edged sword for you as a leader. If this communication is utilized to commence the evaluation of the incident and the response, or to superimpose administrative oversight of the decision making process for the incident response, on-site stress will skyrocket.

### **Managing Stress - Post Incident**

Stress seems to evaporate upon the conclusion of an evacuation, regardless of the outcome. There is relief that decision making is over, and exhaustion often plays a key role in making it feel as if everything is now behind you. If the outcome is positive, euphoria may also play a role in making the stress seem to disappear. The reality is however, that stress is very much present, and it is not about to dissipate without proactive work.

For your remaining students or group members, it is time to let them know that signs of stress will either continue to manifest themselves, or will likely reappear. These signs include irritability or antisocial behavior, changes in sleep patterns, or changes in eating habits. You may also need to deal with issues of loss of trust in your leadership, or a loss of their own sense of safety in the environment in which the incident occurred.

It is also important to have members of the group express what they are thinking and feeling in an atmosphere of trust and safety, as much as that is possible. Talk about what the worst, and best, things were for them during the incident and evacuation. Help them find pride in their role in the successes, and to find proportion and perspective regarding things that may not have gone as well. Most importantly, do not attempt to talk anyone out of how he or she is feeling. Let them know that you understand that he or she is feeling that way, and that while you all are still in the field, you are available to discuss either these feelings or other concerns whenever they need to.

As a leader, you need to be concerned that you don't fall prey to the "I'm okay" syndrome. Your very first question to yourself should be "do we stay in the field?" There will certainly be situations when it makes sense to stay, but now is the time to rely on your organizational or program protocols, or advice or direction from administrative staff. The decision to stay in the field, and to determine how to manage the emotional and stress issues related to the event, should not be based on the outcome of the evacuation alone. Even if the evacuation was a textbook model of stellar success, you will likely have some significant issues to resolve - all of those emotions you put into the "To Be Dealt With Later" file. The questions you ask yourself may include, "Could I have done a better job?" Or, "Was my original decision that led to the incident a poor one?"



It is at this point where the Critical Incident Stress Debriefing (CISD) process becomes extremely important. Leaders and all members of the group should debrief under the facilitation of a non-involved party with expertise in CISD, to begin to process the event. This allows the group to articulate emotions such as sense of loss, anger, helplessness, or perhaps even guilt over a sense of pride in a job well done, even when the outcome was still not positive [see NOLS Wilderness First Aid, Stackpole Press, Chapter 21, Stress and the Rescuer]. It is also important to recognize that even if the outcome of the event is excellent, and the patient is no longer in danger, that the need for CISD will still be likely. Don't fall into the trap of thinking that you can base the need for this important emotional processing on how things end up working out.

## **Conclusion**

At the conclusion of any evacuation, and after the critical incident debriefing process, there does need to be an evaluation of both the incident, and the response to it. While this may add to the leader's stress level, this should also be viewed as normal and important. Any organization of quality and repute, as well as any leader with pride in the high standards of professionalism of our field, will welcome and demand the opportunity to analyze decisions and assess performance. Once you have been fully supported in the field, it is not only an administrative responsibility to second-guess decisions and conduct, but as an outdoor professional, this is your responsibility as well. It is by doing this type of assessment that organizations grow, outdoor professionals deepen their experience, and the industry as a whole does a better job of managing risk in our chosen program environment.

The subjects touched upon in this article are basic to considerations of field evacuation, and of course, there are many more issues to consider. However, what is critical to the success of any response to a field emergency is preplanning, training, and an institutional commitment to the highest standards of wilderness risk management.

## **Biographical Sketches:**

**Jay A. Satz** serves as Vice President for National Field Operations for the Student Conservation Association, Inc. His responsibilities at SCA include developing and directing SCA's risk management program and oversight of all of SCA's field programs, including training and hiring of all field staff, and evaluation of all SCA field programs. Jay also serves as an SCA representative to the National Wilderness Risk Manager's Committee. Jay can be reached via e-mail at: [jay@sca-inc.org](mailto:jay@sca-inc.org)

**David McEvoy** is a professional paramedic for Missoula Emergency Services in Missoula, MT, as well as the co-founder of the Aerie School for Backcountry Medicine. Aerie provides wilderness medical training to individuals and organizations such as SCA and the US Forest Service Smokejumpers. David can be reached via e-mail at: [Aerie@montana.com](mailto:Aerie@montana.com)



**Kurt A. Merrill** is the National Director of Conservation Work Crews and Risk Management for the Student Conservation Association, Inc. His responsibilities at SCA include managing all crew-based activity and directing SCA's Risk Management Program. Kurt also serves as an SCA representative to the National Wilderness Risk Manager's Committee. Kurt can be reached via e-mail at: [kurt@sca-inc.org](mailto:kurt@sca-inc.org)

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**For further information, contact:**

Kurt Merrill- National Director,  
Student Conservation Association, INC  
1265 S, Main Suite 210  
Seattle, WA 98144  
Phone: (206) 324-4649  
Fax: (206) 324-4998  
E-mail: [kurt@SCA-inc.org](mailto:kurt@SCA-inc.org)

# EMERGENCY RESPONSE SYSTEMS FOR OUTDOOR PROGRAMMING

## Paper Written by:

Jay A. Satz, Vice President, National Field Operations  
Student Conservation Association, Inc.

## Presented by:

Kurt A. Merrill, National Director  
Conservation Work Crews and Risk Management  
Student Conservation Association, Inc.

**Abstract:** As outdoor program administrators, we spend a large portion of our time anticipating and managing the risk associated with our programs. Unfortunately, many times we end up focusing our limited time and resources toward developing and enhancing the “in the field” response and we neglect investigating and developing a more global organizational response to managing crisis situations. This paper will focus on developing and implementing an organizational Emergency Response System (ERS) that links the folks in the field who are managing a crisis with the resources, expertise, and support of your entire organization.

It is particularly important for folks reading this paper to realize that, although the Student Conservation Association’s (SCA) ERS is national in scope, and utilizes some technological “whiz-bangs” to help enhance and expedite communication, Emergency Response Systems in their most simplistic form, are relatively easy to implement. The bottom line is, starting an Emergency Response System is a matter of investing an appropriate amount of staff time to pull together the documentation – documentation that most likely already exists in your organizations various handbooks and manuals.

Keeping that thought in mind, the author will discuss SCA’s Emergency Response System as a model that provides emotional and logistical support to field staff, manages internal and external communication (i.e. media, parents, staff), and provides a mechanism for incident documentation and tracking. The author will also explore the tools necessary for implementing an Emergency Response System including written plans and protocols (duty officer handbook, Emergency Response Plans), technology (call forwarding systems, www interface, pagers, cell phones, radios), staff training and system evaluation.

## Introduction

The key to running a safe and successful experientially based outdoor program is in anticipating and managing risk. This is not, of course, a particularly profound statement. As the final decade of the twentieth century winds down, professional standards in our “industry” for the technical qualifications and proficiency of field staff continue to grow. Training for both staff and program participants is continuing to become more sophisticated, resulting in specific and specialized certifications. Efforts to document

protocols for participant medical screening, wilderness evacuations and the many other activities our programs employ in the field have become so formalized that many of these publications are now available at your local bookstore.

Why is it then, when we are investing so much time, energy and capital into our “in the field” piece of what we do, that so many of us have yet to apply the same resources to developing a formal administrative response to crisis in the field? Perhaps the most compelling reality in our industry, the realm of the non-profit, is that when a staff member has an extra hour of time to invest in program safety, it seems most beneficial to put that time into enhancing existing organizational risk assessment and prevention strategies. And when capital resources are tight to begin with, the day-to-day needs of your program are usually more competitive for your program’s extra dollars than the development of an Emergency Response System.

Another reality is that when a business is staffed with a bunch of folks who have field experience, judgment, and savvy there is a tendency to rely on that staff expertise in a pinch, sometimes at the expense of more formalized planning. As these are the people who have more than likely helped develop the organizational response to a lost participant, or for managing an entire course’s evacuation from a forest fire, this seems a reasonable cast of characters on which to rely.

This is how our emergency support system worked at The Student Conservation Association (SCA) for 30 of the last 40 years. Since 1957, SCA has been running backcountry programs in wilderness settings, providing both an educational experience for over thirty thousand participants, and a significant amount of badly needed conservation work on public lands. SCA field staff often “graduated” into key administrative posts. Utilizing their field experience, they expended a tremendous amount of time and energy over those years developing appropriate protocols for safety on the work projects, operating vehicles, medical screening of students, and all other areas of risk management that are now part of the wilderness risk management culture.

Despite the commitment and effort, it became apparent to SCA management about ten years ago that there were not adequate protocols linking incident management at the field level with all of the resource and knowledge available throughout SCA administratively. No one likes to spend time contemplating the worst case scenarios, and SCA was fortunate enough to have the wherewithal to tackle this task without a tragic incident to spur the organization toward this important next plateau in institutional risk management.

Outdoor programs do not, however, always have the luxury of being able to recognize the appropriate time to enhance risk management protocols to include a documented Emergency Response System. Whether adequate resources for a comprehensive system are available or not, beginning to develop a plan is very important.

## Developing the Plan

Figuring out what you want your organization's Emergency Response System to do is the first basic step. For SCA, the goal of the system is two fold: first, to tie all the resources available in the field to all the resources of the organization as a whole, and second, to be sure that the organization is aware of any and all issues occurring in the field.

In the field, we have trained and competent field staff running the program, a carefully researched emergency response plan for each Conservation Work Crew or Crew activity, which identifies all the resources available for search and rescue, evacuation and the like, and hopefully, some form of working communications.

Organizationally, SCA has on-call staff serving as Duty Officers, who provide a liaison to staff in the field and are one step removed from the stress of dealing with the ongoing situation. The Duty Officers in turn represent a base of experience and offer a perspective that represents SCA's entire operations staff and SCA's physician advisor. And finally, the Duty Officer can connect the field personnel with sophisticated communications systems of telephones, faxes, and modems, etc. The system accomplishes the following:

- **Provides logistical support to the field staff involved.** The SCA Crew Leader(s) will often be able to manage the immediate situation, and simply report on the results. On rarer occasions, SCA Duty Officers will need to provide human, logistical, communication or material support to manage the incident. This may include working with the resource management personnel of the site, search and rescue personnel, etc.
- **Provides emotional support to the field staff involved.** The Crew Leader(s) are encouraged to utilize the system for any reason they may need emotional support or reassurance. In simple cases this may be a comforting word on their difficult decision to send home a participant who would have benefited immensely from the program, but was too disruptive to the rest of the group to stay; to managing a rare but occasional disagreement between field staff members on the program; to arranging for the emotional support of the entire group in the face of an incident that led to serious consequences of either a physical or emotional nature.
- **Manages internal communication.** This requires bringing various program staff into the incident communications loop, sometimes including staff at one or more of SCA's six offices, the notification of SCA's Safety Officer or President, and if necessary, the Board of Directors and Legal Counsel.
- **Manages external communication.** This includes next of kin and the media. Most often, incidents will require a student's parent to be contacted to be informed of some minor situation, or the necessity of the student's departure from the program for minor illness, injury or emotional issues (homesickness or

discipline). In rarer cases, but in anticipation of such scenarios, this aspect of the system is also designed to manage media interest in the incident at hand.

- **Develops incident documentation.** The Duty Officer is responsible for documenting the incident on SCA's standardized Incident Report Form, acquiring the appropriate incident tracking number required from the program director, and for assuring that the required supporting documentation (SOAP or runners notes, Wilderness Risk Managers Incident Report, etc.) will be retrieved from the field.

Two important philosophical threads wind throughout SCA's Emergency Response System. The first is that the system is *not* designed to begin the evaluation of the incident or to determine how field staff managed it. While this assessment and review is a critical piece of SCA's over all risk management plan, this is not the time or place for this activity to commence, and we want the staff reporting in to feel supported rather than analyzed. And second, it is SCA's policy that the staff onsite have the best knowledge of the situations, and thus should continue to make the decisions impacting the outcome. The ERS is designed to get these folks in the field the resources they need in order to follow through with the successful management of the incident.

In the three years since SCA's comprehensive system replaced a less formal combination of redundant response mechanisms, many additional organizational benefits of the new system became apparent. Here are just a few.

- **Less time required of staff.** With Duty Officer on-call rotating, staff are very much "on" during occasionally intense periods, but can also look forward to times when they are free of call and the responsibilities that go with it. This physical and emotional break helps protect staff from burnout.
- **A system that utilizes many levels of staff expertise.** Communication protocols provide the resource of experienced or senior program staff as a back up for newer staff who share in the call schedule. When questions occur the Duty Officer has access to a staff member with more experience, but the more experienced staff no longer need to take each and every call that comes in.
- **Staff resources are used more efficiently.** In the case of more serious field incidents there is a tendency for the entire program staff and organization to get wrapped up in the minute-to-minute unfolding of the incident. This is a natural human trait, as folks in our line of business tend to be very committed and caring. But, all other aspects of the organization need to continue to run efficiently while a crisis in the field is being managed. The Duty Officer protocol clearly outlines who will be contacted, and enables a majority of staff to remain uninvolved in the crisis.
- **Cost reduction.** For SCA, when a uniform system of response was implemented over all program activity, telephone answering services, pagers, cellular

telephones and the like were provided for by fewer vendors, and used much more efficiently by staff. This has resulted in less cost and fewer types of technology.

## **Tools for Implementing the Plan**

There are four critical tools for implementing an organizational Emergency Response Plan; the written plan, the assisting technology, staff training on the plan and technology, and the formal evaluation of the field incidents and the plan's strengths and limitations in managing incidents in the field.

### ***Written Plan***

The first, and most obvious, is the written plan itself. At SCA, this document is the *SCA Duty Officer Handbook*. This book covers the various protocols for managing and documenting incidents called into SCA from the field. Among the subjects covered are:

- **Glossary.** This provides a definition of common terms.
- **Internal communication protocols.** This includes the various defined thresholds of events, which require communications from the field to on-call Duty Officers, from Duty Officers to senior Program Staff, from Program Staff to the Safety Officer, and from the Safety Officer to the President, designated media spokesperson, Board and Legal Counsel.
- **Incident documentation protocols.** This includes the documentation forms.
- **Detailed description of system operations.** This includes the technological user's guides and instructions.
- **External communication protocols.** This includes contacting next of kin, and working with the media (media worksheet included).
- **Residential contact information.** This resource includes staff, Legal Counsel, and Board of Directors home telephone numbers.

### ***Technology***

The second set of tools is in the technological realm. Now, there are very strong opinions in this industry about the utility, dependability and philosophical appropriateness of the latest communications "gismos" currently available. Each organization needs to thoroughly evaluate both the needs and philosophy of their programs. At SCA, we have adapted the following:

- **Crew Leaders in the field** in backcountry situations utilize Motorola King radios tied into the communications systems of our hosting resource management agency (NPS, USFS, BLM, etc.). Front country programs use cellular telephones (staff or participants are not permitted to have personal cellular telephones on SCA programs).



- **SCA field staff serving on-call as Duty Officers** have numeric pagers and cellular telephones. Additionally, a service provided by StarTouch International called ESA (Electronic Secretarial Administrator) provides each staff member with a personal voice mailbox with 800 (or 888) number service. ESA allows multiple programming features such as the ability to route a call received at the individual 800 number through up to four different telephone numbers, voice mail, the ability to conference up to eight callers into the same call, broadcast faxes, etc.
- **Anyone needing assistance from SCA** calls a national 800 number for immediate connection to SCA's Emergency Response System. Because we manage this number through the ESA system, during non-business hours, this single number is programmed to automatically contact the on-call Duty Officer at whichever actual telephone (home phone, hotel phone, cell phone, pager, etc.) they choose to have ring.

### ***Training***

The third tool is thorough training on the system, protocols and technology provided to field staff throughout SCA. Crew Leaders are fully oriented to how the system works and SCA's expectations of the communications we require from them. Duty Officers are oriented on an annual basis to the systems, protocols and the use of the technology; and additionally have a StarTouch technical representative available for programming questions and/or trouble shooting the systems. There is also an overall orientation for SCA staff working out of the SCA national headquarters office in Charlestown, NH, the location where the ESA system rings during business hours.

### ***Evaluation***

The final tool is a system wide evaluation conducted on an annual basis by program and administrative staff. Obviously, all of the tools listed above will need to be tweaked, amended or changed based on the results of a thorough evaluation.

### **Creating an ERS with Limited Resources**

If you are working with limited resources, and trying to figure out where to start, consider this -- don't move forward piece by piece. Think big enough to make a plan, recognizing that implementation of the plan may be a multiphase operation. Once the plan is made, then prioritize the implementation.

For SCA, the driving force in developing our ERS was based on our recognition that we were not organized or sophisticated enough to deal with the implications of mismanaging potential media involvement in an SCA field incident. As we all know, how the media reports a serious incident or fatality can be the single event that sinks a non-profit. We continued to rely on less formal on-call schedules and low levels of technology for several years after the original system was designed. In tackling the media piece first, we also worked through appropriate routes of both internal and external communications.

This pointed out the logic and necessity of actually changing some staff position descriptions and realigning responsibilities that had been assigned based on personal interests or experience rather than structural common sense.

Another thing to do if you can move forward in only one or two areas is to standardize internal communication. Your organization does not need to be very large for this to be an issue! With the development of all of SCA's protocols and thresholds for communication notwithstanding, the largest improvement in internal communication was a standardized documentation of actual incidents. Not only did this vastly improve internal staff communication; it also allows participation in the Wilderness Risk Manager's Incident Reporting System.

Finally, if ever there was an area to avoid jumping into too soon, it is technology. In our fast paced society, there is this tendency to lean toward technology first to solve communications challenges. SCA built a system that worked without the conveniences and added advantages of the bells and whistles -- we figured out everything else first, and layered in the technology last. At this point even as we assess the first season using any new technology, if we find things that are not working, it will be that the technology was too simple or too complex to meet the system needs. The system was sound and has changed very little since its re-development.

### **A Final Word**

Each of us needs to recognize that even with the continuing growth and sophistication of assessing and managing risk in the outdoor arena, there are percentages that come into play. The reality is that, despite all of our efforts, crisis in the field will occur. Hopefully an organization that has put considerable effort into every ounce of prevention possible recognizes that it still owes it to the program's participants, staff and Board of Directors to have a carefully considered and documented plan of action at the ready to deal effectively with the worst case scenarios. By planning for such events, many programs, as SCA did, will soon discover that the ERS methodologies will also be a resource to provide other valuable program support and organizational benefits. And like that life insurance policy that we all loathe to purchase, it is nevertheless good to know that it is there when you need it.

### **Biographical Sketches:**

**Jay A. Satz** currently serves as Vice President, National Field Operations for the Student Conservation Association and serves as an SCA representative to the National Wilderness Risk Managers Committee. The author would like to acknowledge the assistance and advice of Meg Hafer in the preparation of this article. Jay can be reached via e-mail at [Jay@sca-inc.org](mailto:Jay@sca-inc.org)

**Kurt A. Merrill** currently serves as the National Director of Conservation Work Crews and Risk Management for the Student Conservation Association, Inc. and serves as an SCA representative to the National Wilderness Risk Manager's Committee. Kurt may be reached via e-mail at [Kurt@sca-inc.org](mailto:Kurt@sca-inc.org)

**For further information, contact:**

Kurt Merrill -National Director,  
Student Conservation Association, INC  
1265 S. Main Suite 210  
Seattle, WA 98144  
Phone: (206) 324-4649  
Fax: (206) 324-4998  
Email: [kurt@SCA-inc.org](mailto:kurt@SCA-inc.org)

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## PROCESSING FOR PICASSO AND OTHER MASTERS

Tammie Stenger

Beth Ryan

*"Art is not the sideline: it's the essence."- Diane Montgomery*

**ABSTRACT:** Everyone who has worked in the outdoors has seen both successful and unsuccessful group processing sessions. While it is relatively easy to successfully lead a group through technical outdoor skills, leading a group successfully through a processing session takes a little more finesse and artistry. Jane Panicucci (1999) said, "Artist facilitators are very conscious about their next brush stroke, considering what type of activity or framing or direction might be appropriate." This paper outlines some common difficulties in processing, and adds some suggestions to help outdoor leaders to develop into one of the great masters of processing.

### Common Pitfalls

The group you are working with just got the entire group over a sixteen-foot wall. The participants are celebrating - all smiles and high-fives! So you gather everyone together and start debriefing this fantastic accomplishment. In less than three minutes, the general mood has turned from elation to boredom, indifference, or nervousness. What happened?

One possible culprit is ANALYSIS PARALYSIS (Gass, 1993), over analyzing the experience. The facilitator, who asks too many detail-oriented questions, generally causes this. At other times, the participants start going too deep on their own and the facilitator neglects to keep the discussion on track.

A second suspect is DISCOUNTING or KILLER STATEMENTS (Rohnke, 1989). Occasionally, participants will sell themselves or one another short and make comments that hurt or offend one of the other group members. As a general rule, only constructive feedback should be allowed.

Facilitators sometimes suffer "DIARRHEA OF THE MOUTH" and manipulate the entire discussion. When the leader does too much talking and doesn't allow group input, the participants tend to "tune out," leading to minimized ownership on the part of the group.

If you WAIT TOO LONG after the experience, the group may forget something, or they may have already dealt with a situation and have no desire to relive that experience. Try to process the experience as soon as possible after it ends, so that important issues are not neglected. If however, the group needs to satisfy more primary needs (e.g. bathroom, food, sleep) it may be beneficial to wait a little while so that the group can focus on the processing, not the rumbling in their stomachs.

If EMOTIONS ARE TOO HIGH, occasionally it is a good idea to give the group an emotional time-out, so that no one says anything that they will regret later. By waiting a little while, the participants can put the experience into a different perspective before

discussing it. An important thing for facilitators to remember is that if you do take an emotional time-out, there are most likely some important issues that the group will need to resolve. Avoiding talking about the experience may cause problems to grow and fester, so gently guide the discussion.

In your quest to develop a team, sometimes we accidentally push the group members to divulge **TOO MUCH PERSONAL INFORMATION** early on in group development. Sometimes, when the group is working well together, they feel comfortable with each other and share personal information. Sometimes, this information leads the person who shared it to regret it later on. At other times, the facilitator or other group members may not feel prepared to deal with that news. Either way, it could lead to tension between group members.

In the United States, we are used to sound and are relatively **UNCOMFORTABLE WITH SILENCE** (Wyman Center, 1996). Because we are uncomfortable, we either ask a lot of questions or start rambling, or we move on to something else too quickly. Try waiting just a little while in silence after you ask a question.

Developing the art of facilitation requires patience and practice. Pay attention to the pitfalls and avoid them, but focus your attention closely on what you can do to improve your skills.

### **The Facilitator's Role in Processing**

It is important to understand your role. When you are working closely with people, leading and teaching them, know what you can, should, and should not do. When you are setting the stage for processing, remind the participants to only **SPEAK AS AN INDIVIDUAL** (Wyman, 1996) not for the group. Each person will have a slightly different perspective on the activity, so it is important to respect each perspective. An important aspect of this is **CHALLENGE BY CHOICE** (Rohnke, 1989). We remember it well during physical challenges, but sometimes we forget the psychological challenge that comes with expressing an opinion. Always remember that each individual has the right to "pass".

When processing make sure that the **LEARNERS TAKE RESPONSIBILITY** for learning and for what they take from the experience (Wyman, 1996). You can help doing this by asking **OPEN-ENDED QUESTIONS** periodically during the debrief. Remember to wait after you ask questions. **SILENCE** can be your best friend, because it gives the participants time to think about the question. Remember during processing to keep your **FOCUS ON THE GROUP'S NEEDS**.

Processing can be a useful tool. It can be used to:

- prompt thought
- keep the group on task
- intervene as needed

- ensure inclusion of all group members.

One of the hardest parts to developing into an artistic facilitator is keeping your own needs separate from the group's needs. Try to take care of your own needs before or after the experience, because it is hard, if not impossible to be responsible for others when worrying about yourself.

Once a facilitator has paid attention to avoiding pitfalls and understands his/her role, the next step is to understand a little more of the How's and Why's of processing.

### **Theories of Processing**

Some people may wonder why experiences are processed. Experiential learning suggests that after an experience, if we critically reflect on the activity, we can derive some meaning from that activity, which can be changed or adapted and then applied to other experiences (Kolb, 1984).

The processing is often designed in multiple ways. Some people use the MOUNTAINS SPEAK FOR THEMSELVES (MST) model (Gass, 1993), which essentially means that the participants reflect on the experience on their own and may or may not derive a lot of learning from the experience.

The most common processing model is the OUTWARD BOUND PLUS (OBP) model. This process involves the facilitator leading the group through a discussion after the activity (Gass, 1993). Although this type of processing is more reactive than proactive and can be difficult for entry-level facilitators, it does have many benefits and can serve as a basis for debriefing the Metaphoric Model that will be discussed later in this paper.

Learning tends to occur in the context in which it happens, which means that there are occasional difficulties with the TRANSFER OF LEARNING. Gass (1985) indicates that there are three major types of transfer: SPECIFIC, NON-SPECIFIC, AND METAPHORIC. Specific transfer means that skills learned in one situation can be used in closely related situations. Non-specific transfer involves learning general concepts that are used as "a basis of learning or behavior in a new, not-necessarily-parallel situation" (Hood & Lane, 2000). Metaphoric transfer also refers to learning principles and ideas for use in a new situation, but adds that these concepts are not the same in structure, but are similar or metaphorical.

In the METAPHORIC Model of processing, a good deal of effort is expended in framing or briefing the experience before it happens (Gass, 1993). This model suggests framing a concept to be learned by identifying parallels or similarities between the task at hand and tasks the participants face on a regular basis. Essentially this means, frame the concept to be learned into the context in which it will be transferred (Cross & Laidlaw, 1999).



## Sequencing the Debrief

Debriefing is an important part of processing, and in many cases it is the only part of processing that is implemented. Closely reflecting the experiential learning cycle, is the most common debriefing technique, the “WHAT? SO WHAT? NOW WHAT?” method (Rohnke, 1989). The first portion, “What?” is a chance for the participants to reflect on WHAT happened during the experience. The second section allow the participants to answer the question, “SO WHAT did that experience mean?” At this point they look for insights, patterns, and personal meaning from the experience. Once the participants have derived meaning, NOW WHAT do they do with their new knowledge? This is the chance for participants define for themselves how they can apply their knowledge to future experiences.

## Processing Activities

Gardner (1983) recognized that there are many ways of knowing and understanding. He identified the following seven MULTIPLE INTELLIGENCES so that teachers could understand more about their students:

- Verbal/linguistic – words and language
- Musical/rhythmic – sensitivity to rhythm, beats, and tonal patterns
- Body kinesthetic – physical movement and body awareness
- Interpersonal – person-to-person communication and relationships
- Intrapersonal – inner states of being, self-reflection, metacognition
- Visual/spatial – visualizing objects, creating mental images
- Logical/mathematical – inductive and deductive thinking, patterns

Most processing models primarily use verbal/linguistic, and interpersonal strategies. Because people learn and understand in a variety of ways, and have different strengths and abilities, consider trying other techniques during processing. A few ideas include:

- Newspaper headline – have each person write a headline for an imaginary newspaper that is covering the experience you just finished
- Journal writing – give everyone a few minutes of quiet time alone to write in their journals with the option to share what they wrote with the group
- Use processing cards – have a variety of picture cards and let the students draw their own meaning from the activity
- Track pack - use specific objects to guide the processing
- Instant replay – break the group into smaller groups and have them pantomime or act out one small portion of the experience
- Drawing a picture - let the participants draw a picture depicting the experience through their eyes
- Sing a song - Have the participants think of a song that reminds them of the experience (either sing or speak the words)
- Hi and low of the day – participants share what they thought were the best and worst parts of the day

- The whip - short round robin - each person ends a statement such as “I really liked the way we...”

In order for the participants to get new things out of the experiences, it's important for the facilitator to try some new things as well. While developing technique keep a few things in mind. Some groups take a while to open up, so there may be some resistance. Try to make the processing activity-centered. In other words make the experience connect with the debrief. Listen and observe closely, to stay in tune with the participants needs. Sequence the debrief to start with easy issues and work toward more difficult issues. In this way facilitators are more likely to get the group thinking and discussing and deriving more from their experience.

Facilitation is an art form, not an exact science. The techniques in this paper are tools designed to help train great Masters. Good luck, we hope your next art show is a huge success!

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### **Biographical Sketches:**

**Tammie Stenger** is a doctoral student in the Leisure Studies Department at Oklahoma State University. Her outdoor experience includes summer camp administration, school camp program planning, youth development programming and leading adventure and environmental educational activities.

**Beth Ryan** is a master's student in Therapeutic Recreation at Oklahoma State University. She has worked in a variety of recreation settings: camps, courses, etc., with clients from diverse populations. Her passion is working with youth at risk in adventure settings.

### **For further information, contact:**

Tammie Stenger  
Oklahoma State University  
OSU Department of Leisure Studies  
115A Colvin Center  
Stillwater, OK 74078  
Phone: (405) 744-5507  
Fax: (405) 744-6507  
Email: [bg\\_tls@yahoo.com](mailto:bg_tls@yahoo.com)

## AN ALASKAN EXPEDITION: STUDENT DEVELOPMENT PLUS ACADEMICS EQUALS EXPERIENTIAL EDUCATION

Wayne Williams, Ph. D.  
Rich Campbell, M.A.

**ABSTRACT:** During the summer of 2000, twenty students, faculty, and staff from Appalachian State University spent three weeks traveling, learning, and experiencing the natural world in Alaska. The expedition was a first time collaborative effort between the Outdoor Programs Office, Student Development, and the Recreation Management Program, part of an academic department. The group camped in Denali National Park, sea kayaked on Prince William Sound, and backpacked on Kenai Peninsula while studying the history of the conservation movement, federal land management, native issues, and commercial recreation and tourism in Alaska. Preparing a large group for a meaningful, rewarding, and safe back country travel experience is a challenging undertaking. Pre-trip preparation and education, course credit, itinerary, reservations, logistics, use of on-site lecturers, risk management, and equipment selection were all given careful attention before the trip began.

A multi-week group expedition to a distant locale is always a challenge that offers the possibility of outstanding rewards. Add to such an expedition an academic component and the rewards can be multiplied. In May of 1999, the authors met to discuss the possibility of planning and organizing a three week trip to Alaska that would combine the efforts of the Outdoor Programs Office (OP) and the Recreation Management Program (RM) at Appalachian State University. While RM had offered travel courses in Europe and Costa Rica, and OP had organized backcountry expeditions to the Everglades and courses in Wyoming, the two areas had never pooled resources to offer a major study tour. RM faculty hoped to offer a backcountry course in Alaska, and OP had the technical and logistical expertise to make it possible. It was agreed early that the two areas would share planning tasks, and meet on a regular basis to exchange information. All finances (collection of fees, deposits, and payments) were handled by OP. OP also provided students with necessary gear, including tents, sleeping bags, pads, stoves, and cookware.

### **Trip Objectives**

Establishing trip objectives was a major concern. Academically, Alaska offered an opportunity to study the history of natural resources use (and misuse) on a grand scale. RM created the special topics course: Recreation Resources Management in Alaska, while the OP director, as an adjunct professor in the RM Program, taught a Wilderness Experience Practicum, a regular course offering. The natural and cultural history of the state were studied through an extensive assortment of assigned readings, videos, guest speakers, and web sites before the trip was undertaken. Students read works by John Muir, Bob Marshall, Barry Lopez, John McPhee, Adolph Murie, and Edward Abbey as anthologized in A Republic of Rivers: Three Centuries of Nature Writing from Alaska and the Yukon by John A. Murray (1990). Wilderness and the American Mind, 3<sup>rd</sup>

Edition by Roderick Nash (1967) provided a detailed history of the conservation movement in Alaska, and the resulting Alaska National Interest Lands Conservation Act. Articles from *National Parks, Alaska, and Alaska Business* magazines, and web sites for the State of Alaska, conservation organizations, Alaskan newspapers, and the Library of Congress (Thomas) provided up-to-date information on current issues. Through their readings, students were immersed in the history of the state, Native American concerns, environmental issues, and current regulatory and legislative matters affecting outdoor recreation in Alaska. Commercial recreation and tourism and their impacts on host communities, both positive and negative, were made focal points.

The group met five times during the spring 2000 semester for lectures and to watch videos. Two graduate students presented on the geography of Alaska and commercial fishing in the state. Lenny Combs of The Last Great Wilderness Project, a non-profit organization dedicated to protection of the Arctic National Wildlife refuge, presented a guest lecture with slides. Leave-No-Trace techniques, as applied to Alaskan environments, were demonstrated. The spring meetings gave students a chance to share meals, converse and form bonds that would be essential during the rigors of expeditioning. To evaluate their knowledge, a take-home examination covering readings and information gleaned from web sites was completed by the students prior to the departure date.

Student development objectives were centered on the personal growth of individuals and the group. OP has discovered the positive impacts that extended expeditions offer to students and has made them central to their mission within student development. The participants consisted of two graduate students in Geography, a Biology/pre-Dentistry major, twelve Recreation Management majors, and one Interdisciplinary Studies major. An element that was crucial to the success of the trip was the addition of two student assistants to the initial team of outdoor programs director and professor. David Mueller, a graduate student, and Jamie Beard, an undergraduate, prepared meal plans, selected equipment, and advised students on appropriate clothing and gear. OP's mission includes on-the-job training of students as outdoor leaders, and experience helping to lead this trip was the culmination of David and Jamie's training.

Safety was another major objective. Risk management included extensive research and planning, including interviews with experienced professionals in Alaska. Detailed medical information and signed waivers were collected from all participants. Another important risk management feature was the one-to-four staff to participant ratio. The group of twenty was subdivided into teams of ten for backcountry travel in order to minimize impact on sensitive environments and qualify for Forest Service permits. Each ten member group was outfitted with a full first aid kit, and an "ouch pouch" for minor first aid. The student assistants were both Wilderness First Responders with extensive experience as outdoor leaders. The participants were further divided into five person cook groups, and groups were periodically re-shuffled to give participants a chance to expand relationships.

### **Planning and Logistics**

The trip leaders agreed that the travel experience would include opportunities to reinforce classroom learning through on-site lectures in settings that provided real world examples. Wilderness environments that would offer chances to use outdoor skills were a must. The travel plan also had to include the "high points" of the Alaskan experience. Alaska: A Lonely Planet Travel Survival Kit by Jim DuFresne (1997) served as an excellent starting point for developing the itinerary. It provided detailed information on campgrounds, lodging, van transportation, rail schedules, and museums as well as pinpointing the locations of necessary facilities such as laundromats. Web sites with Email addresses made it possible to hold long distance phone calls to a minimum. Backcountry travel was planned utilizing guidebooks such as 55 Ways to the Wilderness in Southcentral Alaska by Helen Nienhueser and John Wolfe (1994), Trails Illustrated maps, U.S. Geological Survey topographic maps, and nautical charts for Prince William Sound.

Early reservations were one of the keys to a successful trip. Campsites at Denali National Park were reserved in October of 1999, and lodging in Anchorage was secured by December. Airline, bus, and rail tickets were reserved before January of 2000. Arrangements for sea kayaking and off-shore fishing were made well in advance. Deposits and/or full payments were made as early as possible to simplify travel and avoid the necessity of carrying large amounts of cash or travelers' checks during the trip. Group permit arrangements were made early with the U.S. Forest Service for travel within the Chugach National Forest.

Alaska Windsong Lodges provided excellent long distance van service. Their comfortable vehicles and competent drivers made travel easy. Unfortunately, travel in Anchorage was unreliable and costly. Rental vans might provide a better alternative to the combination of buses, taxis, and shuttle services used by the group. The final leg of the journey, from Seward to Anchorage, was made via the comfortable cars of the Alaska Railroad. Lodging in Anchorage was arranged with Alaska Pacific University (APU). APU's residence halls proved to be safe and comfortable at the incredibly low cost of \$25.00 per person per night. Cree Boll, the Dean of Students and a former Outward Bound Instructor, was a most gracious host.

### **Maintaining the Academic Experience**

In order to help them focus on and expand the knowledge they acquired during the spring semester, the students were given a second take-home exam to complete during the trip. Answers could be gleaned from on-site lectures by Gordon Olson, Chief of Research and Resource Protection at Denali National Park; Sarah Leonard, Executive Director of the Alaska Wilderness Recreation and Tourism Association; and Joan Frankevich, Program Assistant for the National Parks Conservation Association in Anchorage, as well as through conversations with outfitters and park employees. As a service project in Denali National Park, the group volunteered to help remove dandelions, an exotic species, from



an area where they had gained a foothold. Backcountry skills training included map and compass work, use of stoves, pitching tents, and paddling tandem sea kayaks. Teachable moments abounded, ranging from the roar of icebergs calving from glaciers to the barely visible camouflage plumage of ptarmigan in alpine tundra. Students were assigned the introspective task of maintaining a journal during the trip, and the events of the day were processed informally around the campfire or cookstove at night.

### **The Trip**

The group's first glimpse of Alaska was a panoramic view of the mountains surrounding Anchorage, including Mt. McKinley in the distance. While recovering from jet lag, the group was introduced to local culture at the Alaska Native Heritage Center. The weather was cold and rainy as the class traveled to Denali National Park in the almost round-the-clock daylight of an Alaskan July. This segment of the trip served as a "shakedown" for testing equipment and skills in a campground setting. Despite almost constant rain, low temperatures, and mosquitoes, the travelers were thrilled by the site of caribou, moose, Dall sheep, bears, and wolves from the park bus. Foxes at close range became a common site, and a large grizzly sauntered through the campground to remind everyone of the wilderness nature of their surroundings. Students further explored the park through day hikes and treks up neighboring mountains. On the last day in the park, the clouds lifted to provide a fleeting glimpse of the enormity of Mt. McKinley.

Following a brief stop over in Anchorage, the group traveled to Whittier to be outfitted by Alaska Sea Kayakers and Honey Charters for five days of sea kayaking on Prince William Sound. The sound provided a background of icebergs, glaciers, snow-capped peaks, and waterfalls punctuated by sea otters, bald eagles, and sea lions. After another four days of rain, the skies cleared for a final glorious day of sunshine on the sound.

The final segment of the trip was centered on the fishing town of Seward. Seward offered opportunities for rest and relaxation, souvenir shopping, and a chance to examine the impact of tourism, including cruise ship stopovers, on a small community. With a van shuttle, the class backpacked for three days in the Chugach National Forest, highlighted by a campsite on scenic, high elevation Lost Lake. The closing event of the trip was a day of off shore fishing aboard the Rainysong with Captain Bob. The group caught 375 lbs. of filleted halibut, silver salmon, sea bass, red snapper, cod, and flounder, providing the main dish for a grilling party, with the remainder frozen and shipped home.

That last group meal offered a chance to examine the Alaskan experience from the standpoint of its impact on the group and individuals. Several of the students voiced a desire to preserve the resources of Alaska for their descendants to see and enjoy. All agreed that the experience was one that drew them closer as a group, and which taught them to grow in order to live in a sometimes harsh, sometimes dangerous, but always beautiful environment. The students took home photographs, souvenirs, journals, newfound friends, and, hopefully, a heightened appreciation for the delicacy of wild places and an increased confidence in their backcountry skills.

## Post Trip Considerations

After a several week period of time for contemplation, and to have film developed, the class assembled for a final meeting. Over a pot luck dinner, the group shared memories, passed around photo albums, viewed slides, and agreed that they needed to return to Alaska. Students will only feel the full impact of the experience after adequate time for reflection and processing. In the final evaluation, the objectives of the trip were met and exceeded.

The need for financial support from university administrators is an unfortunate reality. It is always advisable to publicize a trip such as the one described above in order to ensure future support. This trip was featured in an article in Appalachian's school paper, and articles are being prepared for *Appalachian Today*, and *Teaching and Learning at Appalachian*, magazine format publications directed at alumni, faculty, staff, and administrators. This expedition has opened the way for future collaborations between OP and RM. More importantly, it has set the stage for the Outdoor Programs Office to provide similar outdoor leadership and logistical services to other academic departments that offer field courses, such as Geography, Biology, Geology, and Anthropology.

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**Biographical sketches:**

**Wayne Williams** earned a Ph.D. in Recreation Resources Management from Texas A&M University. He has conducted outdoor recreation research for the National Park Service, U.S. Forest Service, and North Carolina State Parks, and has been published in the field. He has led study tours to Central Europe, Washington, D.C., and Alaska, as well as traveled in Costa Rica, Mexico, Hawaii, and the British Isles. He is a professor of Recreation Management at Appalachian State University.

**Rich Campbell** is a coordinator with the Appalachian State University Outdoor Program. He received a B.S. in Recreation Management and an M.A. in Student Development from Appalachian before becoming an adjunct faculty member with the university. He has also been an Associate Director of The Eagle's Nest Foundation, a non-profit organization promoting experiential and outdoor education for young people. He has led fourteen, multi-week, expeditions in a variety of areas but most recently in Alaska. This is Rich's fifth ICORE.

**For further information, contact:**

Wayne Williams  
Appalachian State University  
Department of HLES  
Boone, NC 28608  
Phone: (828) 262-6335  
Fax: (828) 262-3138  
Email: willwe@appstate.edu

# **PLANNING, ORGANIZING, AND RUNNING A RIVER CLEANUP**

**Bruce Saxman**

**ABSTRACT:** River cleanups are a great way for an outdoor program to give something back to the environment they depend on and are almost ready made to take on this kind of activity. However, a good cleanup is not only about picking up trash. They raise the level of awareness in the community about pollution, local resources, and your program.

This presentation covered planning, organizing, and running a successful river cleanup. Key points were site selection, first aid, volunteer recruitment, trash and recycling disposal, public relations, community involvement, sponsors, and entertainment. As an example the University of Nebraska of Omaha Outdoor Venture Center's river cleanup for National River Cleanup Week was be used.

## **Why Do a River Cleanup?**

For many outdoor recreation professionals, leading large groups of people into the outdoors is a double-edged sword as a career. On one hand you have a job that allows you to be outside, participating in activities you love and sharing them with others. On the other hand, you are participating in the overuse of the environment, decreasing the solitude that most outdoor lovers cherish and harming the natural land upon which you tread. Therefore I think it is very important for outdoor programs to "give something back" to the environment and support national initiatives like National River Cleanup Week and National Trails Day. Through National Trails Day, the American Hiking Society sponsors over 3,000 events nationwide with an estimated 1 million participants. America Outdoors reports that 30,000 participants took part in National River Cleanup Week last year.

Outdoor programs are often ready made to support and/or organize a river cleanup. Running a river cleanup provides three main benefits. The first and most obvious is the immediate impact on the resource. The physical removal of trash and debris from a river adds to the overall beauty and enjoyment of an area. Secondly, your cleanup increases the community's awareness of local pollution and land management issues. The cleanup should physically remove trash but also work at changing attitudes and behaviors in the community. The third benefit is self-interested. By being the primary sponsor of a river cleanup you are providing advertisement to your program as a resource and an interested party in the community.

## **Planning/Organization**

The best way to accomplish your tasks will be to assemble a planning committee. The committee should be knowledgeable, motivated volunteers with an interest in the cleanup. Volunteer organizations, civic groups, and local governments are good sources for these people. To plan your river cleanup there are eight key areas to plan for. They are the site, volunteer recruitment, publicity, communication, safety plan, waste disposal, recycling, and transportation.

When choosing a site be sure that it needs the cleanup. The committee should scout it at least once. This will be the opportunity to pick out key areas that need attention, locate any safety hazard on the river, and determine how long it will take. Make sure to secure topographic maps of the area to get an idea of the surrounding land, as well as learn the specific laws regarding the river and private property that could affect your cleanup.

### **Volunteer Recruitment**

Volunteer recruitment is essential to a successful cleanup. Start by recruiting those with an interest in the environment (Boy/Girl Scouts, Sierra Club) but don't forget other organizations in the community. Changing attitudes and increasing awareness in your community is equally important as the trash removal with longer lasting benefits. Start your recruiting early to get it on schedules before they fill up with other obligations. Plan on half of the people you would expect.

### **Publicity**

Publicity is important to recruit volunteers. Contact local television, radio, and newspapers to cover your event. If your organization is non-profit public service announcements allow you to advertise for free. Pick a theme and make it sound fun. Provide incentives such as food, entertainment, raffle prizes, and games to lure people to the event. Try to get local celebrities to come out and help.

### **Communication**

Communication is necessary to coordinate the various aspects of your event. Cellular phones and two-way radios make this easy. Allocate these resources and have extra batteries and rechargers.

### **Safety**

Have a safety plan. Know any natural or manmade hazards that could be encountered and keep people away from them. Have First aid and medical support ready in case of an emergency. Be prepared for bad weather. If you have boats on the water make sure participants are wearing PFDs and are aware of boat safety. Liability issues are important. Make participants aware of the risks and hazards early. This can be done through an orientation and waivers. Make sure that minors have parental consent.

### **Waste Disposal**

You are going to have to dispose of all the trash you collect. Have a plan for it. Know where you will take trash and how you will get it there. Tires will need to be disposed of in a specific place. Separate cans and bottles for recycling.

## **Transportation**

Arrange any transportation needs for participants and equipment. Know how you will set shuttles and transport canoes. Have clear, specific directions for drivers. Provide signs and directions for those who are driving themselves.

## **Bringing It All Together**

Use your committee to pull it all together. Assign people tasks you think they would do well in or are in their area of expertise. Use the personalities and knowledge of the people on the committee to your advantage. In the final weeks leading up to your clean up your committee should be finalizing their tasks. Using them come up with a schedule that will work. Plan it down to a point but be flexible in case of delays. Once the clean up starts it will go fast so the more you take care of ahead of time, the better off you will be.

## **References**

America Outdoors. Organizing a River or Lake Clean-up (video). 1999

## **Biographical Sketch:**

**Bruce Saxman** graduated from Clemson University with a degree in Parks, Recreation, and Tourism Management. He is currently the Graduate Assistant for the University of Nebraska at Omaha Outdoor Venture Center where he is pursuing an M.A. in Health, Physical Education, and Recreation. Bruce has 10 years experience in Outdoor Recreation and Education.

## **For further information, contact:**

Bruce Saxman- Assistant Director  
University of Nebraska  
Omaha Outdoor Venture Center,  
60<sup>th</sup> & Dodge Street  
Omaha, NE 68182-0284  
Phone: (402) 554-3257  
Email: bruce\_Saxman@unomaha.edu



**EFFECTIVE BUYING TECHNIQUES FOR OUTDOOR PROGRAM EQUIPMENT**  
**or**  
**"HOW I SAVED \$47,000 ONE WEEK BY SPENDING \$600.00"**  
**and**  
**IN-USE RENTAL INVENTORY, OPEN TO BUY FOR RENTAL, AND TOP RENTAL**  
**ITEMS**

**David J. Webb**

**ABSTRACT:** This article discusses methods and techniques of inventorying rental equipment, of determining the 'Open to Buy (OTB)' for rental equipment, and of finding and obtaining the most favorable prices from outdoor vendors and equipment sources. The top rental items for university outdoor programs is covered. Specific effective buying techniques explain how a savings of \$47,000 in one week was made by spending \$600.

### **Outdoor Recreation Programs Goals and Financial Sources**

The outdoor adventure programs described here are typically extracurricular in nature and are usually not degree granting programs. Some universities and colleges have curricular departments that grant Bachelors, Masters, or Doctorate degrees in recreation related to outdoor education, outdoor recreation, or outdoor pursuits. These degree-granting, educational, academic departments may, or may not, associate or collaborate with the extracurricular outdoor adventure program being sponsored by the student union, intramural, campus recreation, military MWR, or other departments.

#### **Goals**

Experiential in nature, outdoor programs, services, and instruction occur within a wide variety of extracurricular experiences. These experiences are aimed at supporting the following goals:

- Income generation
- Enjoyment of recreation
- Enhancement of curricular and extra-curricular education
- Development of moral growth, education, and skill

Outdoor programs also assist in balanced individual development and quality of life in their community, school, or branch of the armed forces. Outdoor programs may produce income, provide or supplement the program's funding, and provide the profit motive of for-profit businesses. Priority of these goals varies from program to program. The focus of one program may primarily be recreational enjoyment, with education and skill development and development of moral growth as secondary focuses, and income generation the third focus. Another program may have income generation and recreational enjoyment as the primary focus, education and skill development as secondary focuses, and development of moral growth the third focus. Yet another program may have the development of moral growth as the primary focus, education and

skill development and recreational enjoyment as the secondary focus, and income generation as the third focus. Each institution, agency, or business chooses how they want to serve their public, and the public chooses if they will participate or not.

A financial goal of generating income may be to cover all expenses, or 'break even.' Another goal may be to generate profit, with the profit being used to offset inflation, supply funds for program expansion, and/or return income to an owner. Many outdoor programs are subsidized and given funds (a budget) to cover costs of certain expenses. This subsidy, and income generated by the outdoor program through fees and charges, provides funding to operate the outdoor program on a 'break even' status.

Table 1			Gross Expenses, Net Income, Percentages and Figures using Expense Figures		
For example:					
Outdoor Program A		Outdoor Program B		Outdoor Program C	
<b>Expenses:</b>		<b>Expenses:</b>		<b>Expenses:</b>	
Student wages	\$40,000	Student wages	\$0	Student wages	\$0
(paid by the outdoor program)		(paid by work study, \$40,000)		(paid by Student Govt., \$40,000)	
Utilities	\$15,000	Utilities	\$0	Utilities	\$0
(paid by outdoor program)		(paid by the department, \$15,000)		(paid by the college, \$15,000)	
Full time wages	\$25,000	Full time wages	\$25,000	Full time wages	\$0
(paid by outdoor program)		(paid by outdoor program)		(paid by the college, \$25,000)	
<b>Expense*</b>	<b><u>\$80,000</u></b>		<b><u>\$25,000</u></b>		<b><u>\$0</u></b>
*Wage & utility expense total to the outdoor program					

In the attempt to collect comparative data on expense of outdoor programs for the *Outdoor Recreation Directory and Data Resource Guide*, I became acutely aware that financial data is somewhat invalid, inaccurate, and unreliable. Expense data is unreliable because of the diversity of subsidies given in a variety of ways from within the university to the outdoor program. Table 1 illustrates the differences in accounting at three fictional outdoor programs.

Although each of these outdoor programs spent the same amount of money to provide a service, and had the same expenses, the outdoor program of each school reported a different expense because other university budgets subsidized the outdoor program.

Table 2 suggests that through income, recreation is offered; through recreation, skill and education is stimulated; and through skill and education, character development is enhanced.

**Table 2**  
**Developmental Stages of Recreation and Associated Benefits**

III-Character Development		
Self Confidence	Willingness to Risk All	Respect
Independence	Expanded Limitations	Trust
Self-concept	Tolerance	Compassion
Self-efficacy	Acceptance	Empathy
Actualization	Appreciation	Interdependence
II-Skill Development		
Commitments	Physical Development	Improve Academics
Goal Setting	Activity Performance	Innovative Thinking
Decision Making	Nature Awareness	Team Building
Problem-Solving	Communication	Leadership
Responsibility	Value Clarification	Stress Tolerance
I-Recreational Development		
Association	Activity	Sensation Seeking
Enjoyment	Adventure	Self-expression
Diversion	Entertainment	Creativity
Relaxation	Amusement	Catharsis
Pastime	Excitement	Satisfaction

Source: David J Webb, *Outdoor Recreation Program Directory and Data/Resource Guide*, 1<sup>st</sup> ed. (1991):

**Sequence of Accomplishment and Priority of Goals**

The four goals of outdoor adventure and recreation programs are: character/spiritual development, skill/educational development, social/recreational development, and net income production. These goals have an inverse relationship, as illustrated in Table 3.

**Table 3**  
**Goals of Outdoor Adventure Programs**

Do Last	1.	<b>Character/Spiritual Development</b>	Most (1 <sup>st</sup> ) Important
Do 3 <sup>rd</sup>	2.	<b>Skill/Educational Development</b>	2 <sup>nd</sup> in Importance
Do 2 <sup>nd</sup>	3.	<b>Social/Recreational Development</b>	3 <sup>rd</sup> in Importance
Do 1 <sup>st</sup>	4.	<b>Produce Net Income</b>	Least (4 <sup>th</sup> ) Important

### ***Income Generation***

Because income generation pays for the expenses of social/recreational experiences, income is a tool of social/recreational development. Income generation also provides funds for expansion of the outdoor program, the department, division, college, and the university or military base.

### ***Social/Recreational Development***

Providing social/recreational development and opportunities consistent with the institutional standards is of significance. Social/recreational development is a tool to begin to develop skills/education.

### ***Skill/Educational Development***

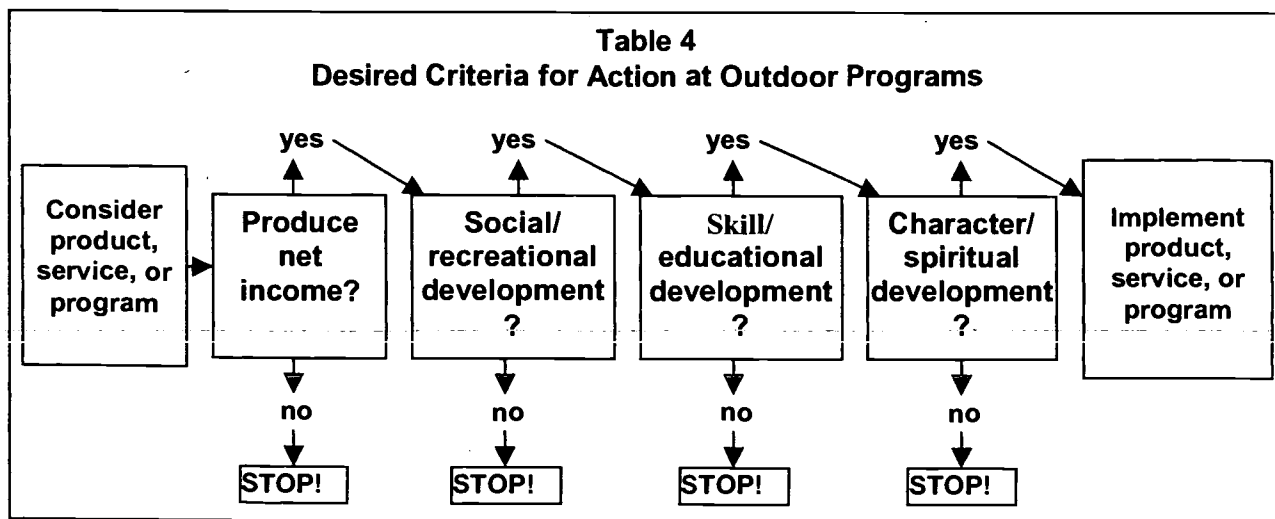
Skill/educational development supports curricular and extracurricular educational and institutional goals. Skill/educational development is also the tool that can lead to character/spiritual development.

### ***Character/Spiritual Development***

Recreational and experiential education enables the development of personal character and spiritual principals, an understanding of who we are, how we relate with others, and how we relate with nature and the world we live in.

### ***Criteria for Action***

An outdoor program desiring to follow the pyramid model should set some sort of criteria for determining beneficial and successful products, services, and programs. Table 4 shows that desired criteria for determining if a product, service, or program should be implemented. The first step in considering a product, service, or program is to ask if the item will produce some type of net income. If the item will not produce income, you stop considering the item. If the item creates income, go on to the second question—does the item help in social/recreational development. If no, stop. If yes, go on to the next question, and so on. If a product, service, or program answers yes to each of the four criteria, then implementation is most likely a correct choice.



### ***For-Profit and Not-For-Profit Business***

Businesses are all groups, organizations, schools, individuals, partnerships, corporations, or entities that receive, collect, use, pay expenses with, or save money. There are two groups of businesses, for-profit businesses—whose purpose is to produce profit to be returned to the business owners—and not-for-profit businesses, commonly called non-profit businesses, where profit is used for the purpose for which the business was established. Both non-profit and for-profit businesses use profit to compensate for inflation and to provide funding for expansion.

In a for-profit business,

- Patrons buy goods and services, providing income for the business.
- Profit is figured by subtracting the expenses from income. (Income-Expense = Profit)
- Profit goes to the owners, partners, and stockholders of the business for their benefit or the benefit of the business.

Not-for-profit businesses are divided into two categories. The first is a not-for-profit business funded by a budgeted income. In these businesses,

- Income is given to the business, coming from a sponsoring agency or institution.
- Income, in the form of a budget allocation income, provides funding for the business's expenses.
- Profit, or surplus income, may be retained by the business or returned to the sponsor.
- Profit is used to offset inflation and to expand the business.
- Profit does not go to benefit an owner, partner, or stockholder.

The second type of not-for-profit business is funded by user-fee income. Not-for-profit businesses funded by user-fee income, operate, act, and react like for-profit businesses. In this type of business,

- Patrons buy goods and services, which provides income for the business.
- Profit is figured by subtracting the expenses from income. (Income-Expense = Profit)
- Profit is used to offset inflation and expand the business.
- Profit does not go to benefit an owner, partner, or stockholder.

A third type of not-for-profit business is funded by both sources. This type of business uses budgetary allocation income and user-fee income to provide funds for the operation and development of the business.

### **Outdoor Equipment Rental Service**

Extra-curricular university, college, military and civic outdoor programs typically offer one or more of these four services: Retail sales, repairs (usually bike and ski), programs (clinics, trips, slide shows, events, etc.), and equipment rentals. In 1999, 167 outdoor programs (about 76% of the outdoor programs at colleges and universities) collected \$3,985,121 in rental fees. One

program collected over \$521,000, four collected over \$100,000, 82 other programs each collected between \$10,000 and \$99,000, and 79 other programs each collected less than \$10,000. Equipment rentals, besides being a possible source of potential revenue, permit an outdoor program "piece-of-mind" in knowing that the program has the ability to provide the right kind, quality, and quantity of equipment for its programmatic needs.

***Summer and Winter Rental Items***

A 1983 survey indicated that the most frequently available summer rental items at eleven university, college, military and civic programs west of the Mississippi River were: sleeping bags 84%, tents 69%, backpacks 68%, stoves 47%, coolers 21%, rafts 21%, canoes 16 %, inner tubes 11%, ice axes 11%, lanterns 11%, sleeping pads 11%, wetsuits 5%, volleyball sets 5%, climbing equipment 5%, fishing gear 5%, and cooking gear 5%. This same study indicated that the winter items most available were: x-c skis 74%, snowshoes 63%, tents 53%, backpacks 53%, sleeping bags 47%, ice axes 11 %, inner-tubes 11 %, gaiters 11 %, stoves 11 %, and ice skates 5%. (Just because 74% of these universities rent x-c skis doesn't mean your organization should, or that x-c ski rentals are a good choice for a school, institution or base now renting them.)

***Rental Item Criteria***

Financial and service criteria used to evaluate items in existing rental programs may include:

- (1) Ranking items by rental frequency
- (2) Ranking rental items by total gross income
- (3) Ranking items by per item income
- (4) Identifying which items are essential for a program activity

These evaluations should be done both on a twelve month financial year basis and for the "life" of the equipment being evaluated. A large raft may not generate incomes in a single year sufficient to pay its purchase price. That same raft, kept for over 10 years may produce a substantial return on investment.

	Description	QTY	RF	GI	PIRF	PII	OU Cost	PI%INC
<b>1 year</b>	16'Raft	2	9	\$1,318	4.5	\$ 659	\$1,746	38%
<b>6 years</b>	16'Raft	2	55.5	\$9,978	27.75	\$4,989	\$1,746	286%

***Rental Frequency***

To identify the rental item with the highest rental frequency, the rental area collects information on how many times a specific type of item was rented. The U of Calgary (1988) rental item with the most rental frequency was sleeping bags with 4700 bag rentals; second was telemark boots with 4687 boot rentals. Their second lowest rental frequency was snowboards with 161 rentals, and the lowest rental frequency was pulk-shuttles with 84 rentals. Brigham Young University's most frequent rental (1988) was downhill ski packages with 4332 rentals, and the 2nd most frequent rental item was the x-c ski package with 1156 rentals. BYU's least frequent rental were badminton sets with 1 rental and 4 gallon jugs with 0 rentals. Identifying items with a high rental frequency may suggest which items should be increased or decreased in quantity or price.



Item	Description	QTY	RF	GI	PIRF	PII	OU Cost	PI%INC
#417	17' Canoe	11	198	\$5,994	18	\$545	\$441	124%

### Items by Gross Income

To identify the rental item with the largest gross income, the total income generated for a specific type of item needs to be collected. The U of Calgary's (1988) largest income grossing rental items were 124 sleeping bags generating \$20,193 in Canadian dollars and second largest was 125 telemark boots generating \$15,055. The lowest income grossing items were 5 snowboards making \$812 and 3 pulk-shuttles making \$633. BYU's highest grossing income items were 216 downhill ski packages generating \$50,215, 88 x-c ski packages generating \$7,781 and lowest grossing items, 17 camping grills grossing \$2.50 and 2 hatchets at \$0.00. Identifying items with a large or small gross income indicates what is making the bulk of the rental income, which can guide the increase or decrease of inventory items.

Item	Description	QTY	RF	GI	PIRF	PII	OU Cost	PI%INC
#417	17' Canoe	11	198	<b>\$5,994</b>	18	\$545	\$441	124%

### Per Item Income

Identify the per item income by using the following formula: Gross item income divided by total number of items.

Item	Description	QTY	RF	GI	PIRF	PII	OU Cost	PI%INC
#417	17' Canoe	11	198	\$5,994	18	<b>\$545</b>	\$441	124%

Use the following formula to identify the per item income *after purchase price*. Gross item income divided by total number of items subtracting the purchase price of the item.

\$5,994.00 / 10 canoes(=\$599.40)	- \$441.00	= \$158.40 PPI (APP)
Gross Item Income divided by the Total Number of Items	-minus the Item Purchase Price	= Per Item Income (after purchase price)

This will either be a positive or negative dollar amount. If positive, the item generates income, if negative, the item requires either a subsidy or a longer amount of time to realize a breakeven for a positive financial return. BYU's highest per item incomes were 2 Tug-o-war ropes costing \$1.00 each rented 80 times with a gross income of \$369.00 resulting in a 18,450% return on the investment, Twister game a 1,230% return, snow toboggans a 877% return. In comparison x-c ski package only had a 77% return and the downhill skis a 116% return. The percentage return only indicates income above the purchase price of the item. For the outdoor programs that have operational costs paid for by student fees or other subsidy sources, the additional income can be used to buy more or better equipment. For those programs that don't receive subsidies, the income can be used to pay student and staff wages or other operating expenses or purchase new equipment.

### Program Items

Identifying which items are essential for a program activity is not difficult. These are items that individuals typically don't have but are critical for group outings. By all other criteria BYU should not have a bike trailer in it's rental inventory, except that it can carry gear underneath and

bikes on top for 22 people. Pulk-sleds, for carrying gear when x-c-skiing are poor rental items financially and operationally, but they add a degree of safety by being able to carry injured people and therefore remain as a rental item. Compasses are not financially successful rental items and have very low rental frequencies, yet compasses must be in orienteering programs for nothing else will serve that need.

Tables 1-4, 1997-1998 to 1992-1998, in Appendix A, have examples of data ranked by items, frequency, gross income, and per item percent income.

### **Data and Principled Acquisitions**

Collect data to build or improve a rental program. Identify what you are now doing. Visit, call, and study other programs, local and distant, and compare your current practices (or what you plan to do) with what they are doing. After collecting objective data, make your decisions and implement your plan. Don't fall into the trap of getting the equipment you *personally* want. Focus instead on obtaining the equipment that your program *operationally* needs and that the students/patrons want.

### **Rental Item In-Use Inventory for Open-to Buy**

The inventory quantity of a specific item can be partially determined by taking an "in-use inventory". A retail Open to Buy formula would be: total items purchased minus items sold equals items available to sell minus number of items sold equals the number of items to order.

$$10 \text{ gloves available to sell} - 6 \text{ gloves sold} = 4 \text{ gloves available to sell} - 6 \text{ gloves sold} = 2 \text{ gloves to order}$$

Because rental items leave and return, it can be difficult to determine if an over or under supply exists. One way to determine if an over supply or under supply exists can be done by taking a physical inventory of rental equipment at peak rental times. This inventory may be of a specific group of items (i.e. winter items) or all items. Identifying peak rental periods (i.e. weekends and holidays) and physically taking inventory, using N(needs more) and E(extra), some idea of peak inventory levels can be determined.

Item	1/22	1/23	1/29	1/30	2/5	2/6	2/12	2/13
Snowshoes (8x20)	N3	N4	N2	N3	E3	E6	E3	N4
Snowshoes (8x25)	N14	E22	N3	N3	E21	E22	NLots	NLots

In the example on snowshoes, the N3 means that the store needs 3 more pairs of 8x20s, and the E3 that the store has 3 extra pairs. If funds and space were available, purchasing 3-4 more pairs of snowshoes would satisfy the demand on most days. Snowshoes (8x25) indicate a substantial over supply on five of the seven peak days inventoried. If funds and space are needed elsewhere, the number of these snowshoes could be reduced by 10-20 snowshoes. This reduction could be immediate through sales of surplus equipment, or reduction could occur over a period of years. There are other methods for determining if an increase or decrease of equipment should occur, from 'the gut' method to computer programs linked to rental operations.

In-Use Winter Rental Inventory and other charts located at the back of this booklet as Appendix B provide examples of In-Use Rental Inventories.

### ***Constraints Impacting the Quantity of Rental Equipment***

If equipment in the short term or long term is proving to be financially and/or programmatically positive, acquiring a quantity sufficient to satisfy peak usage periods is appropriate on two conditions:

1. There are funds available to acquire the maximum amount of equipment desired.
2. There is space available to store the maximum amount of equipment desired.

Having enough equipment so reservations don't need to be made, and knowing that there is enough equipment for all customers on any day provides peace of mind to the manager knowing that:

1. Revenue will be gained because equipment levels were sufficient to match customer demand.
2. Customers will leave satisfied because equipment levels were sufficient.
3. Rental employees will be able to satisfy customers because inventory levels are sufficient.
4. The shop's image will be promoted because customers left satisfied with what they came for.

### ***Open to Buy for Rental Items***

Now that In-Use Rental Inventory has helped you determine the 'target' number of items you desire to have in inventory, lets now determine the 'Rental Open-to-Buy'. This is done by comparing the Current Inventory with Space Available, Space Available with Desired Inventory, Calculated Sell Quantity, Actual Sell Quantity, Open to Buy, and Actual Buy.

First determine the *Current Inventory* by counting all items rented, available to rent, and being repaired. Determine how much storage *Space is Available* for the item. Determine the *Desired Inventory* by using the In-Use Rental Inventory. If the storage *Space Available* will store more equipment than is desired, use the *Desired Inventory* as the "target" quantity. If the *Desired Quantity* is greater than the storage *Space Available*, use the *Space Available* as the "target" quantity. Determine the *Calculated Sell Quantity* and try to sell the item. Determine and subtract the *Actual Sell Quantity* from *Current Inventory*. If *Current Inventory* minus *Actual Sell Quantity* is less than the "target", the difference is the *Open-to-Buy*, the quantity you should buy if funds are available to obtain the *Desired Inventory*. If *Current Inventory* minus *Actual Sell Quantity* is greater than the "target", the difference is the quantity that is overstocked. There is not a need to buy more of this item, there is a need to sell more of this item, or through attrition, reduce the quantity to achieve the *Desired Inventory*. A review of Table 1, 2 and 3 in Appendix C provides examples of determining "Open to Buys". (OTB).

### **Purchasing Methods**

Now that you have assessed your needs and identified what you ought to buy, how do you get the most and pay the least?

#### ***Local Retailers***

The 'expensive' way is to go down to the local outdoor shop and have the local outdoor store sell to you at retail or retail with a 5%-15% discount. Example: sleeping bags cost the retailer \$70. He

adds a 60% markup and prices them at \$112. He gives you a 10% discount and you pay him \$100.80. You save \$11.20 a bag. The retailer makes \$30.80 on each bag.

\$70.00 + \$42.00	= \$112.00	
Retailers cost + markup	= Retailers sale price.	Retailers sells bag to you at \$112.00
(\$70.00 + \$42.00)	= \$112.00 - 10% discount	= Retailer sell bag to at \$100.80
Retailers cost + markup	= Retailers sale price.	Retailers sells bag to you at \$108.80)

**University, College, Military and Civic, Purchasing Departments**

The 'easy' way is to have the university, college, military and civic, purchasing department find some sleeping bags. They will try to find the least expensive bag that meets your specifications. They easily can compare costs, but usually don't have the experience to compare the benefits of different bag manufacturers or sleeping bag features. They probably will be able to get the bags for wholesale. Example: If your purchasing department picks the same bag that you selected in the first example, you would pay \$70 for the bags, saving \$30.80 per bag buying direct rather than buying through the local store. If you were buying 10 bags you would save \$308 buying them factory direct, or instead of buying 10 bags from the local shop for \$1,120.00, you could buy from the factory 15 bags for \$1050.

\$ 108 x 10 bags	= \$1088	
Buy bags from local store with 10% discount		
\$70 x 10 bags	= \$700	
Buy bags from wholesaler		
Savings by buying wholesale	\$388	= 5.54 bags @ \$70 or
\$70 x 15 bags	= \$1,050	
Buy 5 extra bags from wholesaler	Purchase Price	

**Trade Shows** (This is the way I like to make most my purchases.)

The 'pay less than wholesale' way can be done if you

- a. Understand and use buying terms to your advantage
- b. Wisely use buying trade shows to your advantage.

Let's look at purchasing terms.

**Purchasing Terms**

Just as there is a wide range that an item could be sold for at retail, there is a wide range that an item could be sold at wholesale. Here are some payment terms that could reduce the price you pay.

**Closeouts**

Closeouts are items that the manufacturer or distributor wants to get rid of. They may be last years model, or color, or style, or may have a cosmetic or functional flaw. Ask if they have closeouts, and why they are closing them out. I've paid \$45 instead of \$89 (wholesale) for semi-dry suits that had a tight ankle seam which we would easily repair when or if it ripped out (functional flaw). I've paid \$200 for kayaks with a bad paint job (cosmetic flaw) instead of the



usual \$399-\$450 (wholesale). I've paid \$45 a pair for metal edge touring skis instead of \$119 (wholesale) because they were last year's model and did not have this year's 'paint job'.

1 pair	Fisher	Telepathic	Telemark skis	retail \$299	wholesale \$206	closeout \$144
25 pair	Fisher	Telepathic	Telemark skis	retail \$7,475	wholesale \$5,150	closeout \$3,600

retail	\$7,475	- wholesale	\$5,150	= \$2,325 savings
retail	\$7,475	- closeout	\$3,600	= \$3,875 savings
wholesale	\$5,150	- closeout	\$3,600	= \$1,550 savings

### Dating

Dating refers to extensions of credit often 30, 60, 90 days, even 1 or 2 years. It describes the time limits for payment of merchandise. Example: I receive ski products in October but don't have to pay the invoice until March because of 120 days dating. Dating can be expressed a variety of ways.

1. 5% 10th/net 30 means that you will be invoiced on the 1st day of the month and you must pay by the 30th, however, if you pay on or before the 10th of the month you can discount your bill by 5%.

For example:

$$\begin{aligned} &\text{Telepathic skis @\$3,600} - 5\% (\$180) = \$3,420 \\ &\text{If paid by the 10}^{\text{th}} \text{ of the month} \end{aligned}$$

2. 5% 30/net 60 FFA means that you will be invoiced on the 1st day of the month and you must pay within 60 days, however, if you pay within 30 days you can discount your bill by 5% and FFA (full freight allowance) deduct the cost of freight off of the invoice.

For example:

$$\begin{aligned} &\text{Telepathic skis @ \$3,600} - 5\% (\$180) = \$3,420 - \$27 \text{ freight} = \$3,393 \\ &\text{If paid by the 30}^{\text{th}} \text{ of the month.} \end{aligned}$$

3. 5/10 EOM means that you can discount your bill by 5% if you pay within 10 days, full payment due at the End of the Month.

For example:

$$\begin{aligned} &\text{Telepathic skis @ \$3,600} - 5\% (\$180) = \$3,420 \\ &\text{Discount your bill by 5\% if you pay within 10 days of the invoice date} \end{aligned}$$

Two year dating means that you get the product now but don't have to pay for it for 2 years. Ski companies are likely to have this program. Dating allows you to buy ski boots now and pay for them this year, and buy skis now and pay for them next year. The drawback to dating is that the skis might cost \$95 each for a one year dating program and \$99 for a two year dating program. *You are being charged interest.*

### ***Anticipation***

Anticipation is saying that you will pay for equipment earlier than the final payment date. Universities and military bases can use anticipation to their advantage because universities and military bases don't have the same cash flow problems stores have. If a company has a long dating terms as a regular part of doing business, if you pay sooner than required (anticipating the payment date), they may give a discount. Example: I receive skis in October and must pay for them on March 1. There is 1 1/2% per month anticipation. If I pay for them in the end of October then I have anticipated making the payment before the month of November, December, January, and February which is 4 months at 1 1/2% per month equals a 6% discount.

25 pair Fisher Telepathic skis closeout \$5,150 - 6% anticipation disc (\$309) = \$4,841  
If payment due March 1 and paid on October 31 with anticipation of 1 1/2% per month

### ***Quantity Discount***

When you buy more of an item and the price per item goes down, you are receiving a quantity discount. Using skis as an example, for each 25-50 additional pairs bought you might receive an additional 1% discount.

	<b>Retail</b>	Wholes	<b>25-49 prs</b>	<b>50-74 prs</b>	<b>75-99 prs</b>	<b>100+</b>
F. RCR Revolu. Super Carve	\$475	\$285	\$248/13%d	\$242/15%d	\$233/18%	\$228/20%

### ***Pre-season Discount***

A pre-season discount is the discount you receive for placing an order within a time period prior to the main season for selling that item. Orders placed in April for ski goods you will receive next October might receive a 1-5% pre-season discount.

F. RCR Rev. Super Carve	100 pairs @ \$228	= \$22,800	- 3% preseason discount (\$684)	= \$22,116
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### ***Purchasing Example***

Let's use these terms and make some imaginary purchases. We need 24 pairs of skis whose base wholesale price is \$119. We find out that in the larger and smaller sizes we can buy last year's skis on 'closeout' for \$49 each or \$588 for 12 pairs. The other 12 pairs of skis we pay \$119 times 12 skis (\$1,428) minus 5% pre-season discount (\$1428-5%= \$1,356.60), 0% discount for quantity, 1 1/2% per month/3 month maximum anticipation discount (\$1,345.60-4.5% = \$1,295.55). If we had bought 24 skis at \$119 it would cost \$2,856. By buying closeouts, and applying pre-season and anticipation discounts we only pay \$1,883.55 saving \$972.45. If airline, hotel, food, etc. for the trade show cost \$600 then subtract \$600 from the \$972.45 savings and there is still a \$372.45 savings. If other savings were realized at the same trade show where the ski purchases were made, then the savings would be greater. At the 1990 United Ski Industries of America annual trade show I ended up paying \$33,000 for items whose base wholesale price was \$42,000 and suggested retail value was \$80,000. This savings was directly related to my attending the trade show and asking and taking every discount available. Although there is some expense to attending trade shows, between 1982-1991 I saved more than \$3 in equipment purchases for every \$1 spent in attending trade shows.



Wisely selecting items and purchasing wisely (or guiding your purchase department wisely) will allow you to provide more and better equipment at lower costs. Besides, it's fun to make good buying decisions!!

## **Trade Shows**

Why should outdoor programmers attend trade shows, what trade shows should they attend, how should they prepare for trade shows?

### ***Discounts on Purchases***

**The first reason for trade show attendance is to save money by using trade show discounts and special pricing.** I've indicated that at one trade show I paid \$33,000 for items whose wholesale price was \$42,000 and retail value was \$80,000. I paid *\$11,000 below wholesale as a result of going to the trade show.* It cost \$600 for the transportation, food, lodging and miscellaneous for me to go and 6 days of time. By going to the trade show I saved the outdoor program from having to spend \$10,400, or saved \$1733 per day for 6 days.

### ***Comprehensive Product and Price Comparison***

**The second reason for trade show attendance is to save money by buying the right product for a lower price.** Looking at items in catalogs has little value when compared with looking and perhaps briefly using the items as part of a trade show. Looking at prices in one catalog and comparing them with prices in another catalog has little value when compared with looking at prices in one catalog with the manufacturers sales representative with both of you knowing that later you will be in a competitors trade show booth looking at the competitors product and pricing. In the competitive environment of a trade show sales 'reps' try harder to price their product lower. When you can see, handle, and try a product you have a greater chance of selecting the product best suited for the job. Technical or product information can be given to you, at times by the designer or owner of the company. This allows you to make a better choice because you have better information when selecting equipment for your program. Because the best product was selected it should last longer, require fewer repairs, reduce administrative time in replacing it, bring greater patron satisfaction and in the long run generate more income.

### ***Awareness of Trends***

**A third reason for trade show attendance is to save money by buying the right product at the right time and to stop buying products at the right time.** Attend trade shows to be able to see the general direction that an entire industry is moving as well as specific items that may be the hot new or tired old trend. When Burton Snowboards continued to grow and other companies started building snowboards, or when Rollerblades broadened their market and other companies started building in-line-skates, many outdoor programs were quick to catch up with the outdoor programs and shops that were already renting and selling these products.

### ***Training and Development***

**A fourth reason for trade show attendance is to save money by attending technical and educational sessions (for free!).** Attend trade shows to be able to attend technical and

educational sessions. Outdoor companies and associations frequently present seminars regarding products, trends, and management. At Outdoor Retailer Summer Market (the trade show for backpacking, camping, climbing, and paddle boating manufacturers, distributors, and buyers) held in August, the seminars have included topics on:

- "The Sixth Annual Paddlesports Seminar" by Canoe Magazine, Outdoor Retailer, and Du Pont
- "Product Liability and Negligence Concerns" by North American Paddlesports Association
- "Towards and Greener Outdoor Industry: Recycling and Beyond" by Recycling Resource
- "CEN Standardization and Certification" (European climbing gear manufacturing standards) by the Climbing Sports Group/Outdoor Recreation Coalition of America (ORCA)
- "General Meeting" by the Trade Association of Sea Kayaking the Wondrous Tateshenshini Rivers" by Michael Down/Tateshenshini Wild Conservation Alliance

I have attended seminars about bicycle wheel building, marketing, ski tuning, hiring, advertising, putting on special events, safety, customer service and more all for free as part of the trade show. At one trade show I spent an afternoon and evening on a river in Reno. All the canoe, kayak and sea kayak manufacturers had over 80% of their boats on the river bank for trade show attendees to take for test paddles on the river. I spent 3 hours paddling, spending 5-10 minutes in a boat. This allowed me to feel more confident about how these boats perform than just talking to someone who has paddled them. After paddling the open cockpit sea kayaks and talking with the sales rep it was easy to select the boats for our outdoor program based on comparative performance and comparative pricing. Knowledge is power. Acquiring, strengthening, and sharpening your knowledge will allow you to provide a better service and outdoor program.

### ***Build Relationships***

***A fifth reason for trade show attendance is to save money by building relationships that sooner or later save money or solve problems.*** Attend trade shows to be able to strengthen relationships. By meeting sales representatives and outdoor equipment company management you begin to establish a relationship. Significant leaders in the climbing, skiing, bicycling etc. profession can become acquaintances. Later when a company has a special that will help your program, the sales rep might call you so you can take advantage of the opportunity. When you need help, the company management remembers you and may be able to help your program. Sports figures 'drop in' and/or keep you informed about their lecture circuit. College outdoor program professionals have been staying together in the same motels while attending trade shows. The camaraderie and networking that occurs is valuable, but perhaps even more valuable is the sharing with one another of special products or prices that they individually discover at the trade show. This sometimes results in group buying that benefits all! Besides saving money, selecting the appropriate equipment, building relationships, and gaining knowledge—trade shows are fun! They are hard work, but for 'gear hogs' fun work!

## **Trade Shows**

The trade shows that have served my needs the best are these:

### ***Outdoor Retailer - - Summer Market***

This show is usually held at the end of August in Salt Lake City, and is the trade show for backpacking, camping, climbing, and paddle boating manufacturers, distributors, and buyers. This show has grown to be the largest of its kind in the world and could be the only show many outdoor programs would need to attend, especially if you don't buy any type of snow skis. Approximately 7+ acres of gear to look at in a 3 day period. A demo day on a city park pond usually is the day before the official show giving attendees the opportunity to demo canoes, kayaks, etc. Contact: OUTDOOR RETAILER EXPOS, telephone (714) 499-4591.

### ***USIA (United Snow Industries of America)***

With 17 acres of ski and snowboard related equipment and gear, this is the show to attend if you buy downhill, snowboards, and x-c skis as well as other gear. This show is usually held in March in Las Vegas, Nevada. Contact USIA, telephone (703) 556-9020.

### ***Outdoor Retailer - - Winter Market***

This trade show is usually held in Salt Lake City, Utah, the end of January or beginning of February. This is the same show by the same people that put on outdoor Retailer - - Summer Market in August in Salt Lake City with the difference being that at the Winter Market 2-3 days of demoing x-c skis, snowshoes, telemark skis, and ice climbing gear is done (instead of the paddle boat demos). After two days of demos, the three to four day trade show is held in the Salt Palace Convention Center. This is the biggest show in the world of its kind and if you don't need paddle boats or downhill skis, this is the show to attend. Contact: OUTDOOR RETAILER EXPOS, telephone (714) 499-4591.

### ***Interbike***

This trade show is held in the Anaheim Convention Center in California or the Las Vegas Convention Center in Las Vegas, Nevada during the middle of September. This is the west coast trade show for bicycles with 7 to 8 acres of bicycles. A week later a smaller version of this show is usually held in Atlantic City, New Jersey for those on the East Coast. If you are selling, renting, or repairing mountain or road bicycles, one of these shows is a must. Contact: Interbike Expos, telephone (714) 722-0990.

### ***ABIA***

American Boardsailing Industries Association trade show is sometimes held in Corpus Christi, Texas, San Francisco, California, Miami, Florida, or some other location in October. With chances to test sailboards (waiting and rigged on the beach) and booth days in the exhibit hall, this is the show to see for buying windsurfing gear. (One year at this show I bought full wetsuits for \$25 each. I had gone planning to buy 30 wetsuits and to spend \$65-75 each for each one. The savings from that wetsuit purchase paid for the whole trip and I was able to buy more than twice as many wetsuits than I had planned!) Contact AWIA, telephone (800) 333-2242.

### ***America Outdoors***

Formerly the Eastern Professional River Outfitters and the Western River Guides Association, now joined together and called America Outdoors, have their annual convention and trade show in December with the location changing each year. This is the convention and show to attend if you are buying rafts and rafting gear. Contact America Outdoors, telephone (303) 377-4811 or (612) 524-1045.

### ***Attendance Frequency***

I wish I could say that I go to all these shows every year but I don't. I haven't bought sailboards for years and it has been years since I went to the ABIA. I plan to go when its time to buy new sailboards and wetsuits. In seventeen years I missed the USIA show only once. The America Outdoors (rafting) convention is one I attend every 3-4 years when we need to buy rafting gear. I have stopped going to Interbike, but my student bicycle manager and student assistant bike managers have gone in my place for the last 10 years. Because Outdoor Retailer Summer and Winter Markets are only forty miles away in Salt Lake City, I go to those every year. When the Summer Market and Winter Market was being held in Reno, Nevada, I would go to those every 3-4 years. I have even gone to the general sporting goods shows like the NSGA (National Sporting Goods Association in Anaheim, CA) in the fall or the Super Show (Atlanta, GA) in February. These shows are good for team sports but had very little value for outdoor programming and outdoor adventure sports. If you deal in SCUBA or another adventure sport specialty like bicycles, or windsurfing, there are other trade shows associated with that sport that would save you money by attending it before buying equipment.

### **Trade Show Preparation and Participation**

Prepare for trade shows by P—L—A—N and Before—During—After.

#### **P—L—A—N**

P—Prepare ahead of time:

- a. Know why you are there.
- b. Know what items and how many of each you want to buy.
- c. Study the list of exhibiting manufacturers.
- d. Make appointments before the show or the first day with reps of the items you have questions about.

L—Learn the layout of the show:

- a. Review the floor plan of the exhibitors.
- b. Plan your appointments and item reviews by booth number to make the most efficient use of your time.

A—Analyze:

- a. Scrutinize the merchandise, compare comparative items.
- b. Examine prices and terms.
- c. Check the booths for new products and ideas.

N—Network:

- a. Encounter new manufacturers and products.
- b. Listen to the pros at the seminars and evening socials.

- c. Meet and share ideas with other university, college, military and civic programmers during the show.

### ***Before Arriving at the Trade Show***

- Pre-register for the trade show 2 to 3 months in advance. This is usually free, or at least cheaper than registering at the door. On site registration can waste 1-3 hours standing in lines. Book lodging 2-3 months in advance.
- Select a motel by getting a list from the Chamber of Commerce or the yellow pages in the phone book. Call to compare rates. Motels have several different rates for the same room. Ask for 'business man's rate' or 'show rate'. Call the local outdoor program for recommendations. Ask other programmers where they stay.
- Check several airlines and flights at different times of the day. If you're on a tight budget consider a 'red-eye flight'. This flight leaves very late at night and arrives very early in the morning, is very inconvenient but cheap!
- Arrive the day before the show so you can be rested to begin the first day of the show. If you plan to arrive the day of the show and you have transportation, luggage, room, show registration problems, you may miss 1 of the 3 days of the show.
- Plan one day to return unless you can leave after the show is over and still make it home. Trying to return the same day a show ends could make you miss the last day of the show.

### ***During the Trade Show***

Demo days—If the show has a day or days where equipment is available for demo or testing, take advantage of this opportunity. These demo days usually precede the trade show at the exhibit hall and are held at a ski resort, river, lake, icefall, or ocean in the local vicinity of the trade show exhibit hall.

- Dress appropriate for the activity for which you will be participating in: ski clothes for testing skis; river running clothes for testing canoes, kayaks, rafts; ice climbing clothes for testing ice climbing gear, etc.
- Bring a box lunch, be prepared to buy a box lunch at premium prices, or find the 'demo' booth that is fixing free food for the participants.
- Arrive early! Those who arrive with everyone else, or late, may stand in the registration line, wasting their demo time, for 30 minutes to two hours!
- Test the same type of equipment, on the same course, in the same way and style to try to reduce the variables of testing. Record on paper your testing criteria and scores for the equipment tested. After testing the same class of equipment, then test another class of equipment, again recording on paper your testing criteria and scores for the equipment tested. Have testers with novice, intermediate, and advance skills test and then share results with the decision makers. **Test for the equipment your customers want, not what you want for your personal equipment.**
- Visit with other participants and try to obtain their opinion.
- Ask about closeouts. Asking about closeouts will alert the sales representative that you are interested in closeouts and that he needs to find out what is available. The sales representative may be able to alert you that closeouts are not available, in short



supply and if you want them you better get them during the first day of the show, or there is a large supply of closeouts.

### ***Exhibit Hall days:***

- Dress professionally. Wear *comfortable* walking shoes. Have a bag that can comfortably carry 10-30 pounds of catalogs, etc. Notepads, pens, calculators and plenty of business cards, a comfortable, roomy, solid bag to carry catalogs, lunch, and etc. will be needed at the show.
- To save money and time bring a cereal bowl and spoon, cereal, buy milk at a convenience store and have breakfast in your room. To save time and money stop at a convenience store for a sandwich, juice, and snacks to eat at the trade show (restaurants in the show do have food at 2-3 times the cost).
- Attend the free seminars before the show opens (usually between 7:00 a.m. - 9:00 a.m.) or after the show in the evenings and industry socials; network, ask what people are buying.
- Have plenty of business cards ready to hand out. Keep all of the business cards you are given by others in one place.
- On the first day walk up and down the aisles making brief stops only long enough to pick up catalogs, price lists and perhaps a very quick look at items. Make appointments for the next days. Get a general overview of the show.
- After spending 8-10 hours at the show, go where you can change clothes, relax for 10-15 minutes, eat dinner and then network with others to learn of items or prices or study catalogs to develop a written list of questions for the rep the next day.
- Get some good sleep and repeat the process. After accomplishing your goals, check out the nightlife and parties if you desire.
- If you write an order with a rep, have them *fill out their order completely*, listing *all* discount, delivery dates, payment dates *with all calculations completely carried out*. *Make sure you get a copy!*

### ***After the Trade Show***

After returning home and taking care of things that have to be taken care of, go through the catalogs and business cards of others. Throw away some, file some, and use the rest to place orders. Create a file for that show and while the memories are fresh leave suggestions for next year. Determine the cost for attending the trade show and determine how much you saved by attending it. Write a summary report with this and other pertinent information and send it to your supervisor with your recommendation of when and if this trade show should be attended.

Consider attending any relevant regional trade shows, especially 'demo shows' to try equipment, before and after coming to the big one. Stay current by reading the trade magazines. Plan and play your cards right, and your next visit to a trade show can be financially, educationally, programmatically beneficial and personally fun!!

This program will show that specific techniques and procedures can save money when buying equipment as well as produce other benefits. Buying opportunities, definitions of buying and



shipping terms used by equipment wholesalers and manufacturers, free magazines used by buyers and sellers of equipment will be available to help you sharpen and improve your buying skills.

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**Biographical Sketch:**

**David J Webb, B.S., M.A., CLP.** Dave has operated Brigham Young University's outdoor program, BYU Outdoors Unlimited, since its beginning eighteen years ago. The rental, repair, and retail operations of BYU Outdoors Unlimited have been one of the three largest of North American colleges, universities, and military bases for over ten years. He has served on various national association and conference committees since 1989, and currently serves as a member of the AORE Board of Directors. Dave has published over twenty articles and made over twenty presentations. He has consulted for REI, US Navy Outdoor Recreation, US Air Force Outdoor Recreation, and various universities. Dave's research and consulting has taken him to over eighty colleges and universities and more than forty military base outdoor programs. Dave is an author to several outdoor program books, and is the author of the *Outdoor Recreation Program Directory & Data/ Resource Guide*, now in its third edition (2000). David has taught rock climbing, mountaineering, primitive land survival, and other outdoor skills and holds instructor certifications and has taught windsurfing and cross-country skiing. In his spare time, Dave volunteers as an alpine ski and snowboard race official and plays in the wilderness with his family.

**For further information, contact:**

David J Webb  
BYU Games Center  
1172 WSC-BYU  
Provo, UT 84602  
Phone: (801) 378-2166  
Fax: (801) 378-5065  
Email: [david\\_webb@byu.edu](mailto:david_webb@byu.edu)





Table: 3

Ranked by: Rental Frequency

Definition

Item Code Description A propriety number assigned by us for each equipment type. A word describing the item. Qty An abbreviation for actual quantity of items counted during last inventory. Total RF An abbreviation for total rental frequency which is the total number of times the total number of items within this group were rented during one year. Total GI An abbreviation for total gross income generated by all items within this group.

PIRF An abbreviated form of per item rental frequency. This figure is a result of dividing the actual quantity into average RF yielding the average RF of each item within. PII An abbreviated form of per item income. This figure is a dividing item groups total income by the actual quantity. OU Cost An abbreviated form for wholesale cost. Average Wholesale cost paid for rental item group. PI % INC An abbreviated form of per item percent income return. A result of dividing the per item income by the wholesale cost indicates the percentage return on the investment.

Table with columns: Item, Description, QTY, RF, GI, PIRF, PII, OU Cost, PI% INC. Lists various equipment items such as Alpine Skis, Snowboards, Kayaks, and their respective rental metrics.

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