B8723: Global Immersion: Patagonia Leadership Expedition

Fall 2016 TENTATIVE SYLLABUS

Ursl 326

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1. Course Overview

This class centers on a 10-day field-based training that teaches leadership (as well as ecology and outdoor skills) in Chilean Patagonia, one of the world’s most beautiful and diverse mountain environments and a site of increasing ecotourism. The trip will take place on January 10-19th, 2017 with the campus component of the class before the trip in sessions on Oct 31, Nov 14 and Dec 5. The cost of this program is $2520, which covers program costs from the 10th through the 19th, but does not include international airfare, lodging the night of the 9th or 20th and the gear required.

The expedition begins and ends at the NOLS Patagonia site, a 500-acre working organic farm 11 kilometers from Coyhaique, in between rolling hills and snow covered peaks. NOLS Patagonia course areas range from 44° latitude to 48° latitude. The terrain is rugged and remote; the weather can be cold and wet. The phrase “out of your comfort zone” applies in its most literal sense. Through this you will be challenged to lead a group, make decisions under uncertainty, learn from experience and feedback, communicate clearly and motivate the others on your team.

Attendance in New York and Chile sessions are key parts of the learning experience and as such attendance is mandatory. Attendance and active participation are required for both campus sessions and the in-country program. Students who miss the first class meeting may be removed from the course, and as per Chazen policy will not have their program fee refunded to them. No program fee refunds will be given after the add/drop period has closed.
The expedition is led by experienced instructors from the National Outdoor Leadership School (NOLS). Students will learn technical skills, environmental practices, and leadership skills. Please note that this course is physically and personally challenging; students will hike and camp for nine days and evenings, carrying heavy packs, sleeping out on the mountain and preparing their own meals outdoors. Maintaining positive teamwork behaviors when fatigued and away from comforts is a challenge to your emotional intelligence and self-discipline unlike that in other CBS classes.

The weather in this part of the world can be unpredictable and challenging. As NOLS warns:

*The weather in Patagonia is a mixture of wind, rain, snow, and sun. Be ready for just about any type of weather condition. For a country no more than 120 miles wide, Chile contains many micro-climates. On your course you could end up camped on a windy glacier in whiteout conditions or cooking in a heavy downpour. Or hiking in the hot sun, longing for the next stream. The wind can howl, the snow can pile high, the rain can come in sheets-- sometimes for days at a time.*

Instructors help students manage the challenges of the mountains and the weather. As do fellow members of a hiking team. In past years all participants have completed the 10 day trek, surprised by their own strength, resilience, and tolerance for adversity.

After the first day, hiking teams will be led by a member—the “designated leader”--with NOLS instructors in the background providing coaching and feedback. The designated leader makes decisions with their fellow members about routes, camping spots, breaks and so forth. This presents a challenge in “situational leadership,” judging when to be more directive and when to be more consultative. The leader also has to maintain team morale and motivation, despite ambiguity and differing preferences. Students not in the designated leader role on a given day are encouraged to practice “active followership,” acting in ways that support the leader. NOLS instructors introduce techniques of leadership and followership through individual and group discussions. These concepts are reinforced before and after each day’s hike in a daily learning cycle (plan, do, reflect). This week of focused practice, discussion and feedback, with few competing distractions, is an opportunity for internalizing new leadership skills.

Campus session will prepare students for the leadership and teamwork challenges ahead, through exercises and simulations. Consistent with a global immersion course, they also provide some context on mountaineering, the ecotourism industry, and the Chilean
societal and business context. What is the mission of ecotourism firms such as NOLS? How do the forms of ecotourism emerging in Patagonia reflect to the larger Chilean economic context?

2. **Fit to CBS Leadership Programming**

*Leadership Lab* (formerly called the Program on Social Intelligence) sponsors experiential activities and courses designed to enhance students’ abilities as leaders throughout their careers. These feature learning from psychological assessments, experiential challenges, and one-on-one coaching. This combination helps students to sharpen their self-awareness, set learning goals, practice their skills, and learn from their outcomes.

Specifically, this class is premised on “action learning,” developing leadership capabilities in the context of a challenging team activity. You and your team will be stretched mentally, physically, and emotionally. The outdoor mountain experience challenges your discipline in managing your own and others’ emotions. On the mountain, the NOLS instructor will find teachable moments to convey self/personal leadership, peer leadership, leading from a position of authority, and active followership (supporting the designated leader).

3. **Grading and Credit**

Students are required to:

- Participate in three mandatory sessions on campus
- Write a paper on personal learning goals for the expedition
  - 2-3 pages: discuss your goals, weaknesses and strengths
  - this paper will be shared with your “learning buddy” who will give you feedback in a peer review paper, as you will do in return
  - due: December 7\textsuperscript{th}
- Write a peer review paper giving feedback to your learning buddy
  - 2 pages
  - how did the person make progress on the goals they set for themselves on the trip? what other leadership strengths and styles did the person reveal on the trip?
  - due January 25\textsuperscript{th} (write and email to buddy as soon as you can after the trek--do it on the plane!)
- Write a post-expedition paper reflecting on your learning
  - 5 pages: review execution vs. the plan
  - assess individual and team development during the expedition
The final grade for the course comprises:

15% The NOLS instructor’s written evaluation
15% Paper 1 – Personal Learning Goals
15% Paper 2 – Feedback to Learning Buddy
25% Paper 3 – Personal Learning Reflection
30% Participation score from campus sessions

4. Class Schedule

Session 1: Teamwork in Action (Oct 31)
- Questions about expectations, travel, and logistics
- Initial statement of personal learning goals
- Outdoor Teamwork Challenge
  - In Riverside Park, coordinated by CBS alum Marcus Brooks of DiscoverOutdoors.com
- Introduce four leadership roles

To prepare for class:
- Come to class dressed suitably for a 2-3 hour outdoor activity, rain or shine
- Wear your hiking boots-- hilly park terrain, grass and dirt trails
- Read the Course Syllabus (and jot down an initial personal learning goal to share)
- Review documents on the NOLS site under Supplemental Information
  - http://www.nols.edu/nolspro/custom_courses/columbia.shtml

Session 2: Expedition Decision Making (Nov 14)

- Conduct team mountaineering simulation
  - Individual score and team score contribute equally to your grade
- Debrief
- Visit of NOLS representative to answer questions (pending)

To prepare for class:
- Read “Leadership at NOLS”
- Access Everest V2 (an online simulation):
  - https://cb.hbsp.harvard.edu/cbmp/access/42764942
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- Before class, do the “Prepare” work on the web site, which involves reading about your role and watching a few short videos.
- Ensure that the laptop you will bring to class accesses the simulation, firefox is the best browser (Your team will suffer if there are IT delays). Contact Cameron McClure for help: cm2634@columbia.edu

Session 3: Expeditions Continued; Societal and Industry Context (Dec 5)

- Further debrief of Everest simulation: Psychological safety
- Discuss case: Mount Everest - 1996
- Discuss case and articles about Patagonia Sur, an ecotourism business
- Equipment, packing and safety (NOLS representative).
- TA reviews FAQs

Due at the start of class:
- Read your team’s Everest simulation transcript and highlight an exchange that exemplifies a functional or dysfunctional communication dynamic

Before class, please read:
- Mount Everest - 1996 (HBP case)
- Familiarize yourself with regional context
  - http://en.wikipedia.org/wiki/Chile
- Read note and case about industry context: ecotourism
  - Ecotourism: A Brief Introduction (HBP Case 9-700-099)
- Read case about an Ecotourism business, Patagonia Sur (HBP Case 9-211-103) and the following Fortune article:

Study Questions for 1996 Everest Disaster case:

Why did Hall and Fisher believe it was important to set a firm turn-around time for climbers attempting to summit? What psychological and organizational forces prevented this from happening?

Why did clients (Krakauer) not intervene to help guides (Harris) who were suffering altitude symptoms? Why did guides (Boukreev) fail to persuade their expedition leaders (Fischer) that they were overreaching their capacities?
Study Questions for Patagonia Sur case (the fortune article):

How do Chile’s economic policies differ from most other South American nations? What is its primary export? How might its economic/political orientation and its primary export industry affect its approaches to land conservation?

Is for-profit land conservation viable or should environmental conservation be left to governments, foundations and philanthropists? What are the obstacles?

As Warren Adams seeks to expand investment in Patagonia Sur, LLC beyond a few high net worth families to institutional investors, what aspects of his business model should he stress? If you were advising a pension fund about this possible investment, what questions would you have for Adams? (Prepare to role play this meeting).

Post Trip Reunion Lunch Session

- Bring a copy of your final paper and be prepared to share insights
- Discuss ways to carry trip insights forward
- Complete CBS course evaluations

Optional TA Sessions to Heighten your Readiness:

Pre-course Session on Gear (at EMS)
- Meet at EMS at Broadway and 76th
- Review equipment list and options, especially hiking boots

Mountain Skills Session
- Practice with knots, maps, etc.
- Mastering these skills will help you set up and break camp quickly, which is key to enjoying your expedition

Workout Session (on Uris steps)

Leadership Lab “Action Ventures”

Sailing –

Hiking –

http://www8.gsb.columbia.edu/leadershiplab/events/actionlearning/ventures
Optional readings:

Readings related to mountain teamwork and lessons for everyday business:
- *Wilderness Leadership – On the Job, HBR*

Great fiction that's informative about the region:
- Bolaño, R. (2003). *By Night in Chile (Nocturno de Chile)*

5. Course Objectives

The primary objective is developing your leadership skills. Also the class will give you opportunity to make decisions involving real risk. Additionally it imparts project management, environmental and intercultural insights needed in executive roles in global business. During your trip you will get daily feedback about your performance on these dimensions and overall written feedback from your NOLS instructor at the end.

Leadership Development
The course will demonstrate that you are leading all the time in different roles. And the behaviors that work best depend on aspects of the situational factors such as the group’s skill level, task urgency, and outcome predictability. In this course you are expected to become adept in four leadership roles:
- designated leadership (decisiveness, vision, identifying talents, inclusiveness)
- active followership (supporting leader, active listening, role modeling support)
- peer leadership (coordination, collaboration, feedback, conflict mgmt.)
- self-leadership (responsibility, positivity, learning, self-awareness, efficiency)

Risk Management
NOLS teaches wilderness users to practice responsible habits that promote the health and safety of self and others. Each student is expected to:
- Recognize and consistently perform appropriate techniques to reduce or avoid hazards in a remote mountain environment, e.g., rock fall, weather, river crossings, etc.
- Practice effective peer decision-making to mitigate hazards.
- Display sound judgment and an awareness of team and self-limits.
- Demonstrate ability to implement emergency procedures for backcountry situations.
Outdoor Skills
• NOLS students learn to live and travel in mountains within a framework of personal safety and care of the environment. Each student is expected to:
• Live comfortably in a mountain environment, learn to camp, cook, and dress for a variety of conditions.
• Travel competently in mountain terrain using map and compass skills, off-trail navigation, hazard evaluation, route-finding and river-crossing techniques.
• Learn basic skills necessary to traveling on steep snow, ice or rock (3rd and 4th class terrain): self arrest with an ice axe, crampon use and efficient rope handling techniques.
• Accurately assess skills, strengths, and endurance in self and others and conservatively apply those limits to given situations.

Environmental Studies
Participants will explore ethics and develop skills that value and protect the environment. As a member of this course, you will be expected to:
• Practice Leave No Trace minimum impact camping skills.
• Learn about local ecosystem’s flora and fauna, geology, and history.

Cultural Intelligence
CBS groups are diverse in terms of national backgrounds and prior industry and social experiences. In short, they are culturally diverse. This experience of living and working through challenges together in close quarters provides an arena for developing one’s cultural sensitivity and adaptiveness. NOLS attempts to have at least one Latin American Instructor in each group, which adds an element of local culture to the group experience. Success in intercultural collaborations requires self-awareness and flexibility about doing things in styles that may be different from your habits.

6. Readings explained

Required readings for the class are either in CANVAS folders for the Session or they can be found in the HBP site for the course. For session 1, you should read this document and the documents on the NOLS webpage for this program with all the practical details. In session 2, we will conduct a web-based simulation of an Everest expedition, Everest V2. This role-play game requires preparation ahead of time from each student. You will receive an email on the day of our first class that explains what to read and what videos to watch. In class it requires group decision making under time pressure and challenging communication conditions. In session 3, our discussion of teamwork challenges in mountaineering will conclude with a discussion of High-Stakes Decision Making: The
Tentative Version

*Lessons of Mt. Everest.* Also we analyze a case of an ecotourism business because that is a growing industry in the region and one this class takes part in. Leading an Ecotourism firm requires considering a triple bottom line: financial viability, ecological sustainability and human resources and social impacts.

As optional follow-up reading, I’ve listed books that give background about the region and articles about outdoor leadership education: an HBR article “Wilderness Leadership – On the Job” and some NOLS studies.¹ ²

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¹ [http://rendezvous.nols.edu/content/view/1812/816/](http://rendezvous.nols.edu/content/view/1812/816/)