

## **B8723: Global Immersion: Patagonia Leadership Expedition**

**Fall 2014 – B Term, Monday 12:30 to 3:45 (not every week)**  
**Uris 329**

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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 growing site of ecotourism. The trip will take place on December 12-22, 2013 with the campus component of the class before the trip in sessions on Oct 27, Nov 10 and Dec 1. The cost of this program is \$2450, which covers program costs from the 12th through the 21st, but does not include international airfare, lodging the night of the 11th, or 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, express yourself clearly and listen closely, and influence 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. Students who miss the first class meeting may be removed from the course. 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.

**Preliminary Version. Session Contents May Change – Final Version By Oct 1.**

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 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. Students should be prepared for rain and cold.*

Instructors help students manage the challenges of the mountains and the weather. As do fellow members of a hiking team. In past years participants who have felt overwhelmed on the first day end up completing the 10 day trek, surprised by their own strength, resilience, and tolerance for adversity.

The role of NOLS instructors in making decisions reduces once the team's map-reading and trekking skills get up to speed. After the first day, the student designated as climbing team leader will make the key decisions about routes, camping spots, breaks and so forth. This presents a challenge in "situational leadership," determining when to be directive and when to be democratic. The leader also has to maintain team morale and direction, which can be challenging when there is ambiguity and diversity of preferences. Students not in the leader role on a given day are encouraged to practice "active followership," acting in ways that support the formal leader. NOLS instructors introduce these concepts through individual and group discussions before and after each day's hike in a daily learning cycle (plan, do, reflect). The experience of daily discussions and feedback, with few other distractions, is an opportunity for powerful and lasting insights about these subtle but important aspects of leadership. It is an opportunity to practice leadership skills all day long and make them habitual.

Campus session will prepare students for the leadership and teamwork challenges ahead, through exercises and simulations. They also provide some context on the team

mountaineering context and the Chilean context. What is the mission of ecotourism corporations such as NOLS? How do the forms of ecotourism emerging in Patagonia relate to the larger Chilean economic context?

## **2. Fit to CBS Leadership Curriculum**

The Program on Social Intelligence (PSI) sponsors experiential activities and courses designed to enhance students' abilities as leaders throughout their careers. PSI courses activities 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. This class is part of a PSI initiative to increase "action learning" of leadership at CBS.

After the core class in leadership, which introduces some challenges and methods for leadership and teamwork in class exercises, this class provides the opportunity to try them in a more challenging environment, where you and your team will be stretched mentally, physically, and emotionally. The outdoor mountain experience challenges your capacities for managing your own and others' emotions. The NOLS instructor will present ideas about self/personal leadership, peer leadership, leading from a position of formal authority, and active followership (acting so as help the leader).

## **3. Grading and Credit**

Students are required to:

- Participate in three mandatory sessions on campus
- Group presentation in class analyzing an ecotourism business
- Write a pre-expedition paper
  - 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 8<sup>th</sup>*
- Write a peer review paper
  - 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 10<sup>th</sup> (post and email to buddy)*
- Write a post-expedition paper
  - 5 pages: review execution vs. the plan
  - assess individual and team development during the expedition

- *due: January 27<sup>th</sup>*

The final grade for the course comprises:

- |     |  |
|-----|--|
| 20% | The NOLS instructor's written evaluation of expedition performance |
| 15% | Pre-expedition paper1  |
| 15% | Post-expedition paper2   |
| 20% | Post-expedition peer review3                                       |
| 30% | Participation score from campus sessions                           |

#### **4. Class Schedule**

##### **Session 1: Introduction (Oct 27)**

- Discuss safety concerns, risks, and necessary preparations
- Review travel logistics and expectations. (Chazen)
- Opportunities for outdoor learning and conditioning in Fall
- Introduction to Chile--history, politics and culture
- Models of natural resource conservation

*Before class, please read:*

- The Course Syllabus (and jot down an initial personal learning goal)
- <http://en.wikipedia.org/wiki/Chile>
- <http://en.wikipedia.org/wiki/Patagonia>
- *Ecotourism: A Brief Introduction* (HBP Case 9-700-099)
- <http://management.fortune.cnn.com/2011/03/10/warren-adams-searching-for-profits-and-saving-patagonia/>

*Optional background reading:*

- Wlkild, E. (2009). Purchasing Patagonia
- [http://www.academia.edu/1256299/Purchasing\\_Patagonia\\_The\\_Contradictions\\_of\\_Conversation\\_in\\_Free\\_Market\\_Chile](http://www.academia.edu/1256299/Purchasing_Patagonia_The_Contradictions_of_Conversation_in_Free_Market_Chile)

*Assignment Questions:*

*How do Chile's economic policies differ from most other South American nations? What is its primary export? What risks does it face in sustaining steady economic growth?*

*Is for-profit land conservation viable or should environmental conservation be left to governments, foundations and philanthropists?*

*As Warren Adams seeks to expand investment in Patagonia Sur, LLC beyond high net worth families to institutional investors, what points should he stress? If you were*

*advising a pension fund about this possible investment, what would concerns or questions would you express to him?*

**Session 2:** Mountaineering and Teamwork (Nov 10)

- Logistics, safety, any other pre-departure reviews (Chazen and NOLS).
- Conduct mountaineering simulation in teams (scores contribute to your grade)

*Before class, please read:*

- *Everest V2* (an HBP online simulation <http://hbsp.harvard.edu/list/7000-demo-page-basic>).
  - Before class, do the “Prepare” work on the web site, which involves reading about your role and watching a few short videos.

**Session 3:** Mountaineering Debrief, Goal Setting, Logistics (Dec 1)

- Debrief of mountaineering simulation
- TA reviews FAQs

*Due at the start of class:*

- Goal setting paper due
- Read and reflect on your Everest simulation transcript
- Student group presentations: select a decision point or critical moment from your Everest simulation team transcript that illustrates effect leadership or teamwork. Identify another point that may illustrate a weakness that teams are vulnerable to. Prepare to discuss how the latter moment could have been handled more effectively by the team.

*Before class, please read:*

- *High-Stakes Decision Making: The Lessons of Mt. Everest* (summary of the 1996 Everest disaster behind the book *Into Thin Air*)

**Optional activities after campus sessions:**

*Suggestions for plane reading en route to Patagonia:*

- Chatwin, B. (1977). *In Patagonia*.
- Krakauer, J. (1997). *Into Thin Air*.
- Allende, I. (1982). *The House of the Spirits: A Novel*
- Bolaño, R. (2003). *By Night in Chile* (*Nocturno de Chile*)
- Wilderness Leadership – On the Job, *HBR* ([http://hbr.org/2012/04/wilderness-leadership-on-the-job/ar/1?goback=.gde\\_4058842\\_member\\_109012175](http://hbr.org/2012/04/wilderness-leadership-on-the-job/ar/1?goback=.gde_4058842_member_109012175))

### Post Trip Reunion (TBD)

- Organized by Teaching Assistant
- Share reflections and insights from your papers
- Discuss ways to carry trip insights forward
- Discuss ways that course could evolve and other destinations for future action learning courses

## 5. Course Objectives

### Leadership Agility

The course will demonstrate that no one style of leadership works across different situations. Different decision-making styles will be needed depending on situational factors, such as the group's skill level, task urgency, and outcome predictability. But throughout students will practice commitment to their team, acceptance of others, and cooperation to achieve goals. As a member of this course, you will be expected to:

- Function effectively in the following four leadership roles: self-leadership, active followership, designated leadership, and peer leadership.
- Practice seven key areas:
  - i. Continually increase technical competence.
  - ii. Display strong expedition behavior by working effectively as a member of a team and serving group goals with a positive attitude.
  - iii. Maintain flexibility, commitment, and positive attitude in the face of adversity and uncertainty.
  - iv. Accurately identify personal strengths and areas for growth.
  - v. Work to understand the leader's vision and, when appropriate, develop your own vision as a leader; follow through with appropriate action to help the group achieve its potential.
  - vi. Employ leadership styles and decision-making strategies appropriate to the situation; broaden decision-making styles individually and as a team.
  - vii. Effectively communicate ideas, perceptions, and concerns on an individual and group level.
- Provide effective oral feedback to peers and instructors.
- Reflect on the daily experience and actively engage in the debrief process.
- Discuss how leadership behaviors that manifest in the wilderness translate to the business environment.

### Risk Management and Judgment

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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., rockfall, 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. Openness and a willingness to share are the two most important skills that you can bring to the group. Students should come to their course with enthusiasm and a desire to learn. They need to be flexible and willing to do things in a style that may be different from your own. They should be excited to face the unknown, adapt to situations and schedules at a moment's notice, and help others do the same. Finally, learning some basic Spanish

will enhance their experience.

## 6. Readings

Required readings for the class are either listed by urls or they can be found in the HBP site for the course. We will study a few cases to explore models of ecotourism in the region, considering their financial viability, ecological sustainability and human resources and social impacts. As a preparation for the teamwork and leadership challenges of an expedition, 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 and in class it requires group decision making under time pressure and challenging communication conditions. It provides a common ground to think about the experience ahead and to set learning goals. Our debrief of the simulation will conclude with a discussion of *High-Stakes Decision Making: The Lessons of Mt. Everest* – an HBP recap of the 1996 Everest disaster behind the book *Into Thin Air*.

As for recommended reading, I've suggested a few well-written books as plane reading. Also to prepare for and reflect upon the field-based learning, you may want to read intro chapters of the NOLS' *Leadership Educator Notebook*,<sup>3</sup> which explain the models of leadership and experiential learning that guide their training. Further, for the curious, I've listed a few articles distilling what leadership skills are best taught in outdoor leadership education. For example, an HBR article “Wilderness Leadership – On the Job” distills five principles from outdoor exploration that will make you a better manager. As NOLS has offered courses for several decades, some research studies have been conducted to measure the long-term learning outcomes from their programs.<sup>4 5</sup>

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<sup>3</sup> [http://www.nols.edu/enrolled/admissionforms/instructor\\_course\\_curriculum/2009LENCh1-2.pdf](http://www.nols.edu/enrolled/admissionforms/instructor_course_curriculum/2009LENCh1-2.pdf)

<sup>4</sup> <http://rendezvous.nols.edu//content/view/1812/816/>

<sup>5</sup> Sibthorp, J.; Paisley, K.; Furman, N.; Gookin, J. (2009). Long-term impacts attributed to participation in adventure education: Preliminary findings from NOLS. *Research in Outdoor Education*, V.9 (in press).