

INTEREL ACTION LEARNING FIELD NOTES

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These Action Learning Field Notes were created by Bill Matthews and Terry Swango, Senior Consultants and Developers for Prism Performance Systems, Inc., Farmington Hills, Michigan.

Interel's TeamTrek™ (TT-1) is used for the Action Task portion of all activities described in these notes.

Introduction and Overview

TeamTrek consists of a pair of treads, each fitted with hand straps. Teams of participants "ride" TeamTrek by placing a foot on each tread and holding the straps while the team moves in a synchronized walking motion. Because of TeamTrek's simplicity, many different Action Learning situations can be created with just a few modifications to activity rules and conditions.

We have found TeamTrek to be an enjoyable experience and an excellent tool for teaching team building and problem solving skills. TeamTrek combines the physical challenge of the adventure approach with the flexibility and portability of more traditional indoor simulations.

Given here are some pre-activity facilitation considerations that we address when using TeamTrek. Because there is the element of moderate physical exertion, some planning and precautions will make these activities more enjoyable and valuable to all involved.

The above is then followed by a description of various adaptations that are applicable to a wide range of TeamTrek Action Learning situations. These adaptations include equipment constraints, penalties, time limits, planning and communication restrictions.

Finally, to assist you in gaining the most from TeamTrek, we offer some discussion topics and suggestions regarding debriefing after the activities.

Facilitation Considerations

We generally begin by notifying participants in advance that they should come dressed casually and comfortably, pointing out that they will be involved in some light physical activity. We recommend comfortable, loose-fitting clothing and athletic shoes.

We begin the session with a reminder that we are all here to learn, and that we all learn better when we feel safe. So we present some basic “rules” that will govern all TeamTrek activities:

1. Safety First, Learning Second, Fun Third!
2. When in doubt, refer back to Rule 1!
3. Everyone participates -- everyone need not “ride” on the treads, but everyone can play a role as a team member (after all, not every member of a team performs the exact same tasks or roles). So if someone has a condition that prevents them from this type of physical exertion, they and their teammates should negotiate an appropriate role for them.

The following safety precautions should also be presented prior to beginning the actual activities:

- "Communicate, communicate, communicate! Even if the rules call for no talking, if you feel unsafe, or are in danger of falling, let your teammates know."
- "If you feel you are losing your balance on the treads, the best thing to do is: 1) drop the rope handles off to each side, 2) yell “STOP,” and 3) quickly step off the treads with at least one foot to help you regain your balance."

Since TeamTrek activities are intrinsically quite safe, we are careful not to alarm participants with undue concerns about falling or injury. However, it is good to alleviate safety fears whenever they arise.

Activity Adaptations

The following are possible options...

Penalties for falling/stepping off the TeamTrek:

- The person who falls or steps off must face backwards for the remainder of the activity.
- The person who falls or steps off moves to the back of the group and becomes team leader.

- If anyone falls or steps off, the entire team must start over, must retrace it's steps backwards and start over, etc.
- Anyone falling off must grab the hand-holds halfway down their length (wadding up the remainder in their hands for safety) and carry on in that fashion.
- The team decides (in advance) on its own penalty, agreeable to all parties including the facilitator.
- A time penalty (*i.e.* 5, 10, 30 seconds) applied to timed activities.

Time Limits:

- No time limit; work as fast as you can.
- Self-imposed time limit.
- 'Beat the clock' - the facilitator imposes a time limit for each activity.
- Process Improvement - the team tries to beat it's best time in subsequent trials.

Planning:

- No time given to plan.
- The team plans as a whole for *X* minutes.
- Only a designated leader can plan, then delivers the final plan to the team.
- A non-member (coach, sponsor, manager) directs the team's activities single-handedly.
- Two teams "compete" each using a different form of planning (*e.g.* Team One uses the entire team to plan, while Team Two is restricted to using only their leader for planning).

Communication:

- Open communication.
- Only a designated individual may communicate.
- All communication is funneled through a designated third party.
- Communication may be in any form *other than* recognizable words.
- All directions mean their exact opposite (*e.g.* left means right, forward means backward, etc.).

Debriefing Activities

The approach we use in debriefing TeamTrek activities is adapted from the structure suggested by Thiagarajan (1992):

- *Emotional ventilation and role dropping* -- letting off steam and discarding assigned roles; returning to “reality.” (What happened and how did it feel?).
- *Insight sharing* -- participants exchange perceptions, and provide generalizations for further discussion. (What did you learn? What does this mean?).
- *Hypothesis generating and reality check* -- participants suggest various cause-effect relationships or metaphors between the events in the activity and real-world applications. (What does this have to do with ____? Will/does it . . . always, never. . . etc.).
- *Second thoughts and what-if's* -- participants begin to apply the learning as they consider what they might do differently if they did the activity again, or in different contexts. (What would you do differently next time?? What if ____?).

The best debrief questions come from your real-time observations of the action and the participants. Therefore, each run of the activity will likely generate different debrief questions. Some generic questions that can form the foundation of a good debrief include:

- How did you feel (what feelings did you observe in others) during this activity?
- What happened/ What did you observe/ What did you experience in this activity?
- What were your greatest frustrations (successes) during the activity?
- What was your major challenge (individually and as a team)? How did you deal with that challenge? How effective was it?
- How did your thinking (what you were feeling) change during the activity?
- What decisions did you (your team) make? How were they made? How effective were they? What would you do differently next time?
- What actions did you take/try? Was it effective? How could it have been more effective?
- Looking back, were there any options (actions) you didn't consider? If so, why?
- What would you do/try differently if we were to do this activity again?

- What if _____ ? How would things have been different?
- What does this mean in the context of . . . teams, teamwork, etc.?
- How would you apply what you learned to working more effectively as a team?
- Based on your experience, how would you summarize the major learning points (principles) as it relates to teamwork, teams, etc.?

BasicTrek

This exercise, called BasicTrek, is used to familiarize participants with the components of synergistic team performance. Two options are given for this demonstration.

Materials used:

- At least one TeamTrek.
- Markers for Points A & B , which can be chairs, large plastic soda/ milk containers, construction cones, etc.

Option 1:

- Explain that we will be using TeamTrek to explore and experience some of the basic aspects of effective teamwork.
- Briefly demonstrate the use of TeamTrek. Ask for questions.
- Give participants an opportunity to practice as a team on TeamTrek for a period of 2 - 3 minutes before giving the assignment.
- While participants are practicing, set up Point A as a starting line, and place Point B somewhere between 20 - 40 yards away.
- At the end of the practice session, explain that participants will now work as a team to go from Point A to Point B, go around Point B and return to Point A, as quickly as possible while you time them. We usually institute a 15 minute time limit here.
- Explain any penalties for someone stepping/falling off the treads (we generally start with something simple like having the person turn around and face the opposite way as everyone else).
- Ask for any final questions. Start the clock. When the team completes the activity, or time is called, debrief the experience.

Option 2:

Once participants have had some experience with TeamTrek, you can add levels of complexity to the above assignment. One we favor involves:

- Placing a barrier midway between Points A & B. We have used a length of rope, a hotel table with the legs unextended, coats from the participants, participant manuals, a row of plastic jugs, etc. Make sure the barrier is not too high. It should be no higher than a liter plastic container, otherwise participants could risk injury if they tried to go over the barrier.
- Explain that the team will now be asked to complete the course a second time, noting that there is now a barrier between them and Point B on the downside, and between them and Point A on the upside. Remind them that the activity will be timed.
- Be careful how you introduce the idea of the barrier. We usually refer to it as a representation of a moat or some other barrier that lies between the team and their target. The team has to decide how to deal with the barrier, so don't use phrases like, "a barrier you have to go around . . ."
- Start the activity without entertaining any questions. Observe how the team deals with the barrier -- do they try to go over it, around it, or do they become paralyzed by it.
- When the team completes the activity, or when time is up, debrief the activity.

LeaderTrek

This exercise is called LeaderTrek. It allows participants to explore and experience a variety of leadership approaches and their impact on team performance using the TeamTreks.

Equipment required for this exercise:

- Two TeamTreks to allow two teams of approximately equal numbers to operate simultaneously.
- Markers for Points A -- chair, large plastic soda / milk container, construction cone, etc.
- A two-gallon plastic bucket with handle. For indoor activities, substitute a smaller container equipped with carrying handle, filled with a few pints of water.
- A piece of rope or heavy cord about 20 feet long.

Part 1:

- Explain that we are going to explore and experience different leadership strategies using the TeamTreks.
- Set up the course in advance, using a marker for Point A and the bucket in place of Point B (approximately 20 yards from point A). Place the length of rope or cord somewhere off to the side of the bucket.
- Ask for a volunteer to serve as a leader for this activity.
- Once the leader is chosen, explain the task as follows -- the two teams are to go down to where the bucket is, grab the rope, place it through the bucket handle, lift the bucket off the ground and return it safely to Point A without the bucket touching the ground. The bucket must be supported by both teams in concert.
- Explain that both teams must go around the bucket (in effect switching lanes for the return) or that everyone must go back and start over. Also explain that once lifted off the ground, the bucket must not touch the ground again until it has passed Point A, otherwise everyone starts over.
- Finally, explain that all movement will be under the direction of the designated leader. The leader makes all decisions, calls cadence, decides on moves etc. for both teams. No team members are allowed to make process suggestions to the leader. They can give feedback on the leader's performance if requested to do so.
- If he/she desires, allow the leader to review the task and plan for three minutes.
- Set a time limit of 20 minutes for Part 1; start the clock and observe the action. Do not debrief at the end of Part 1. Go immediately to Part 2.

Part 2:

- Announce that we will repeat the activity, but this time, the teams will be self-directed. All leadership will come from within the two teams.
- Thank the leader for his/her contributions in Part 1. Make sure it is clear to everyone that we are looking at the differences between directed and self-directed teams -- not analyzing any individual's performance or potential as a leader. Ask the leaders to observe Part 2 (or have them fill in on a team if the teams are unbalanced).
- Emphasize that to ensure that the experience in Part 1 does not contribute to any increased performance in Part 2, you are going to make the challenge tougher this time. Fill the bucket with water, and increase its distance from Point A by at least 10 yards.

- Give the teams 2 minutes to plan and communicate if they desire.
- Remind teams of the 20 minute time limit. Start the clock. When the activity is complete or time runs out, debrief both parts of the activity.

Note: We have observed some participants trying to tie the rope around their necks, shoulders, waists, upper arms or wrists so that their arms remain free to hold onto the hand-holds of the treks, this can be very dangerous if anyone falls, do not allow the rope to be tied around any body part that might result in injury.

CommuniTrek

This exercise, called CommuniTrek, demonstrates the many problems of misunderstanding that can occur within teams when communication is unclear, one-way only, or operating at multiple levels at once.

Materials needed for this exercise:

- At least one TeamTrek.
- Clothesline or other flexible rope in a length of 75 - 100 feet.
- If the above length of rope is unavailable, any objects that can mark the way will do (e.g. capped markers or pens, wads of paper, clothing, etc.).

Note: This activity is an adaptation of a familiar communication exercise, this time using TeamTrek instead of paper and pencil.

Activity:

- Explain that this activity will explore the role of effective communication on teams.
- Ask for a volunteer. Seat the volunteer/communicator with his/her back to the group members that will operate on the TeamTrek.
- Ask for 3 additional volunteers to be judge/observers.
- Explain that the volunteer is going to describe several shapes to them one at a time. Their task is to form the shape "life size" while remaining on the TeamTrek at all times. Inform the group that they are to use the rope (or other marking device) to "draw" the shape life size according to the instructions they will be given.

- Hand the volunteer/communicator the first shape. Explain to everyone that they will be given 10 minutes to form the first shape. They will not be able to ask any questions. Communication in this round will be one way only.
- Start the clock. Observe the action. Call time after 10 minutes or when the task is completed if the team finishes sooner. Have the judges decide if the finished shape is close enough to the original design to be considered acceptable (have them approach this task from the perspective of a potential customer). Briefly discuss the results.
- Hand the volunteer the second shape (choose another individual to be volunteer/communicator if you like). Explain that in this round, team members may ask questions that can be answered “yes” or “no.” No other communication on their part is allowed.
- Follow the same procedure as in the last round.
- In the third round, allow full two-way communication to take place.
- Debrief the entire activity at the end.

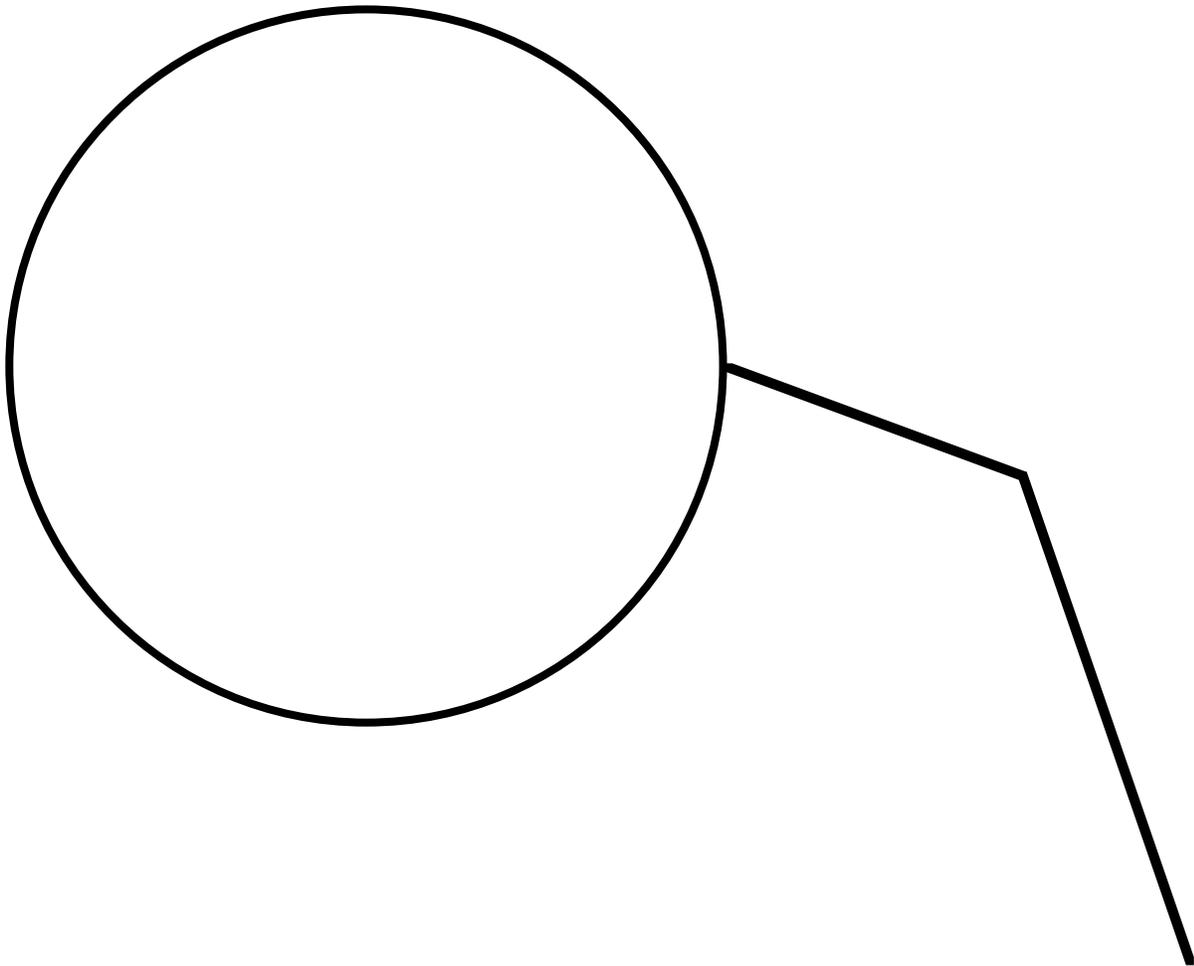
Option:

If time allows (or you can substitute this for one of the original three rounds) have communication take place using directions that are to be interpreted as their opposites (backward is forward, left is right, etc.).

Instructions - 1

You are to communicate this shape to the team so that they can create it while operating on their TeamTreks. Keep in mind that you are only to describe the shape and give directions. You MAY NOT use words that define shapes such as "Make a circle," "Form a square," or "Draw a triangle."

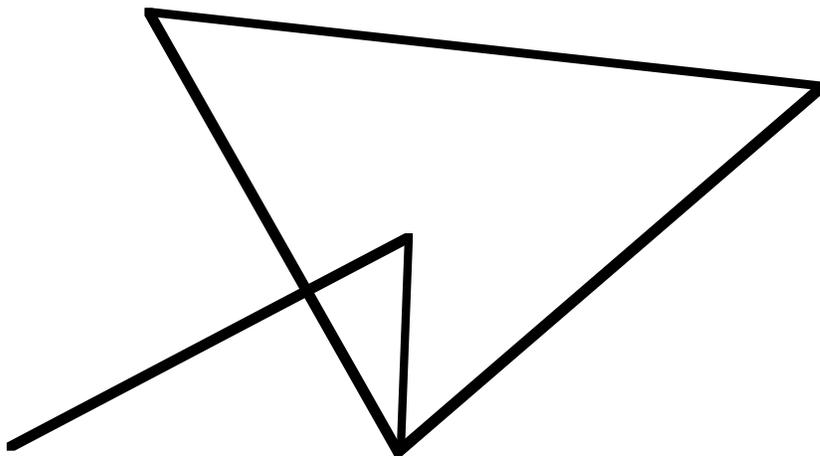
As you look at the diagram on this page, interpret each inch to be equivalent to 3 feet.



Instructions - 2

You are to communicate this shape to the team so that they can create it while operating on their TeamTreks. Keep in mind that you are only to describe the shape and give directions. You MAY NOT use words that define shapes such as "Make a circle," "Form a square," or "Draw a triangle."

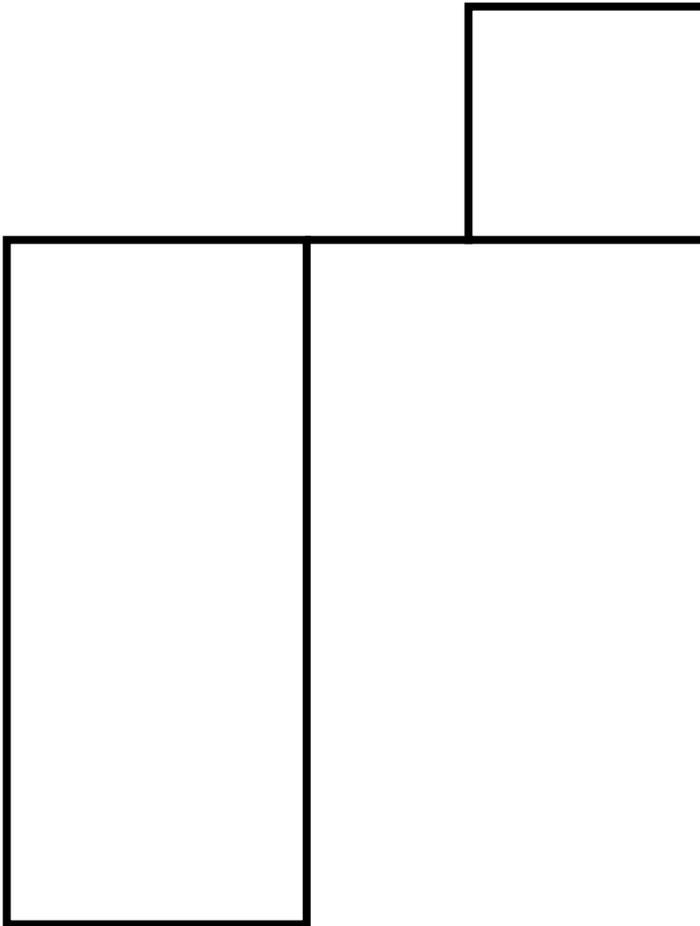
As you look at the diagram on this page, interpret each inch to be equivalent to 3 feet.



Instructions - 3

You are to communicate this shape to the team so that they can create it while operating on their TeamTrek. Keep in mind that you are only to describe the shape and give directions. You MAY NOT use words that define shapes such as "Make a circle," "Form a square," or "Draw a triangle."

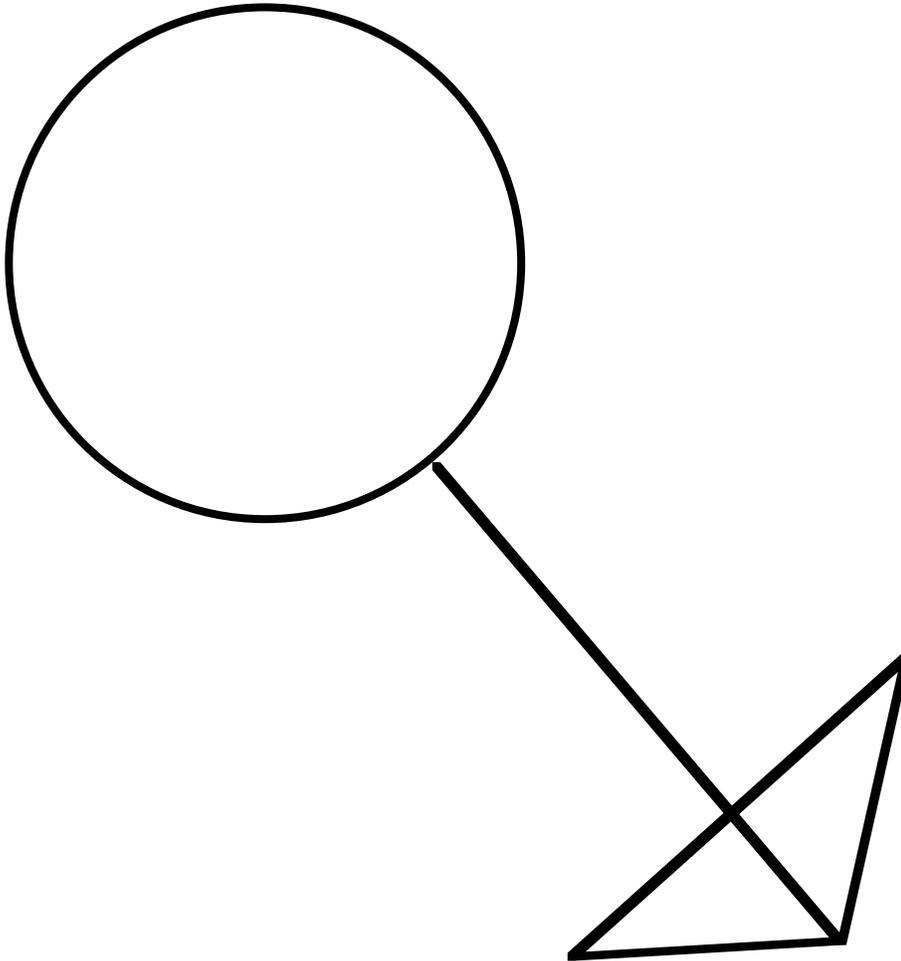
As you look at the diagram on this page, interpret each inch to be equivalent to 3 feet.



Instructions - 4

You are to communicate this shape to the team so that they can create it while operating on their TeamTrek. Keep in mind that you are only to describe the shape and give directions. You MAY NOT use words that define shapes such as "Make a circle," "Form a square," or "Draw a triangle."

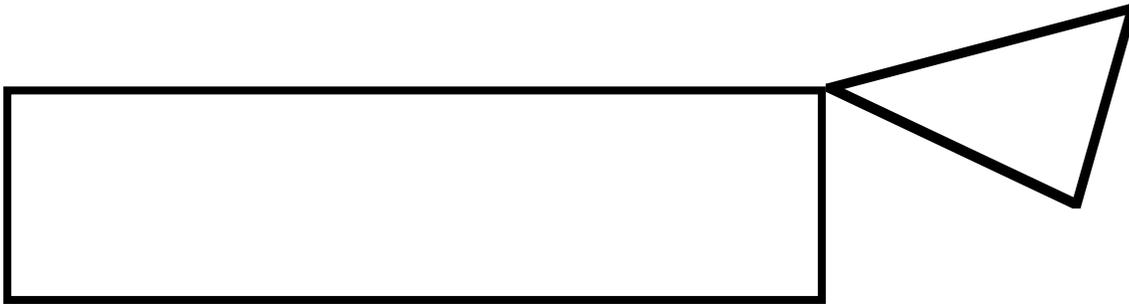
As you look at the diagram on this page, interpret each inch to be equivalent to 3 feet.



Instructions - 5

You are to communicate this shape to the team so that they can create it while operating on their TeamTrek. Keep in mind that you are only to describe the shape and give directions. You MAY NOT use words that define shapes such as "Make a circle," "Form a square," or "Draw a triangle."

As you look at the diagram on this page, interpret each inch to be equivalent to 3 feet.



PlanTrek

This exercise is called PlanTrek. It is designed to explore and experience various issues related to planning and carrying out tasks as a team -- including, but not limited to clarifying Purpose, Positions, Process and Performance expectations.

Materials needed for this exercise:

- Enough TeamTreks to allow two teams of approximately equal size to operate simultaneously.
- A two-gallon plastic bucket with handle; a 10 - 15 ft length of rope.
- Markers - large plastic coda/milk containers, construction cones, carpet tiles, etc. for the following:
 - Start/Finish Area
 - Island
- Instruction Sheets - 2 for team leaders; 2 for observers (each gets the same sheet).

Activity:

- Set the course up before hand, similar to the design attached. Make sure that Island is far enough from the Start/Finish area to make hearing at normal voice levels difficult.
- Ask for two volunteers to be team leaders. Ask for two volunteers to be observers. Divide the remaining participants into two teams, one team responsible to each leader. From among the team members of each team, ask for a volunteer to “live” on the island (there needs to be one volunteer from each team on the island). Send the islanders off to their home, and take the team leaders aside away from the rest of the participants.
- Give each team leader a copy of the challenge sheet . Cover the instructions verbally.
- Ask the team leaders if they have any questions. Announce a 25 minute time limit. Start the clock, and send them back to their teams.
- Meet with the observers briefly. Give them each a copy of the instruction sheet that was given to the team leaders. Ask them to observe the action throughout. Emphasize that they should focus their observations in the areas of: 1) how planning was handled; 2) how was communication handled; 3) how did the teams interact with one another; 4) what behaviors seemed useful; 5) what behaviors were not helpful; and, 6) from the observer’s point of view, what could the team(s) have done to make themselves more successful?

- Call time at the end of 25 minutes or when the teams complete their task. Debrief the activity with team members and leaders first, followed by comments from the observers.

Notes to Facilitator:

We find this activity works best when you have TeamTreks of differing sizes. We place the TeamTreks in a pile, and part of the planning becomes figuring out what size materials are best.

In some instances, we have found that teams have failed to account for the islanders they will need to pick up and carry with them!

Debrief of this activity generally focuses on the planning process and the process of getting the job done. In most instances the islanders are left out of everything. Don't forget that only the team leaders will see the instructions (besides the observers), so the islanders will have no idea of what their role is, or even what the rope is for.

This activity can produce some interesting discussions on planning and communicating effectively. Of course, in a few instances, leaders are so task-focused, that they fail to share information with the rest of the team.

Challenge Instructions

Here is your challenge. You are the leader of an expedition that has been given the task of recovering an ancient Bucket o'Gold for your organization. This is no ordinary Bucket o'Gold. This particular bucket contains all the world's collected knowledge on effective teamwork, all the skills and techniques necessary to carry effective teamwork out, a pass to the Dead show in Portland, and the wisdom to know when and how to use it properly.

You are not alone in your quest. Because of the value of this treasure, many organizations are after it, so you must work fast. In fact, we have it on good authority, that if the treasure isn't captured and returned to your starting point within 20 minutes, it will explode and be lost forever.

You should work as quickly as you can to recover the treasure. Work efficiently but effectively. As the saying goes, "Go for the gold!" Teamtrek materials and teams have been provided for your support. Use them wisely.

Good Luck!

P.S. Here's some additional information we have been able to discover from the local elders:

- The way to the treasure is treacherous. To survive, everyone must stay on their treks at all times. Leaving a trek and touching the ground results in catastrophe -- the person must turn the other way, and 2 minutes are deducted from the time clock. Island ground is safe for islanders only.
- The treasure cannot be handled directly. It must be lifted and carried by some indirect means. We understand that a rope is the only way to lift the Bucket o'Gold. Once lifted, the bucket cannot touch the ground again until it reaches your home territory (Start/Finish Area). If the bucket touches the ground before it reaches the Start/Finish, a 4 minute penalty is imposed.
- We are also given to understand that lifting the Bucket o'Gold is a difficult task, one that has been mastered only by the islanders. Only an island person may lift the bucket and only with a rope. Any one islander may only handle one end of the rope.

DiversiTrek

This exercise, DiversiTrek, gives participants an experience of the impact of diversity on team development and performance.

Materials:

- At least one set of TeamTreks
- Markers for Points A & B - chairs, large plastic soda/milk containers, construction cones, etc.
- Any and all of the following:
 - old magazines and duct or heavy masking tape
 - disposable ear plugs - 1 pair or more
 - large size heavy duty gloves - 1 pair
 - surgical mask or disposable dust mask - 1
 - safety goggles - 1 pair*
 - masks

* We use the goggles with side shields. The goggles should be smeared with a petroleum jelly, or painted with clear nail polish so that vision is somewhat distorted.

- Explain that we will now experience the effect that diversity can have in team development and performance. Point out that statistically there is a strong likelihood that at least one member of every team is challenged in some way. Challenges are physical in nature or result from cultural diversity. Some challenges are obvious to the eye, while others may not be so apparent. Nevertheless, to be an effective team, we have to work together to adapt to these differences.
- Explain that each team member will be given a card that will explain their challenge for this activity. Participants may not ask each other what the other person's challenge is, nor may they voluntarily share their own challenge with anyone else. A participant may, however, confirm a challenge if asked directly (*e.g.* Question: "You have a problem with your eye sight?" Response: "That is correct."). Remind participants that some of the challenges may seem obvious, but be careful about making assumptions.
- Explain that the team's task will be to move from Point A to Point B, go around the marker at Point B, then return to Point A as efficiently and effectively as they can. (Note: a distance of between 20 - 40 yards seems to work best)
- Hand each participant a card with their challenge printed on it. Give them time to gather any props needed to carry out their roles (these will be indicated on the role cards).

- Remind participants of their task - to go from Point A to Point B and back again, going all the way around Point B.
- If time is an issue, set a time limit of 15 - 20 minutes to complete the activity.
- Start the clock!
- Debrief upon completion.

Option:

- Diversity issues can be included in any of the above Team Trek activities by inserting one or more challenged individuals on the teams and advising participants in advance that certain team members *could be* challenged in some way.
- Include questions relating to the challenged individuals in the debrief of the activity.

Challenge Cards for DiversiTrek Activity

Your Major Challenge is: To play yourself as accurately as possible.

Materials You Need to Get from the Facilitator: None

Reminder: You may not share your challenge with anyone on the team. You may respond to direct inquiries only.

Your Major Challenge is: Impaired eyesight.

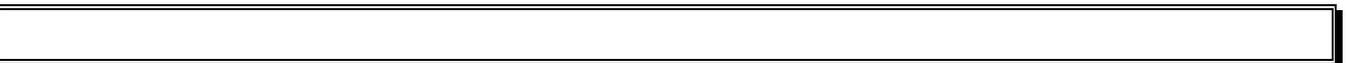
Materials You Need to Get from the Facilitator: A pair of goggles

Reminder: You may not share your challenge with anyone on the team. You may respond to direct inquiries only.

Your Major Challenge is: A hearing impairment.

Materials You Need to Get from the Facilitator: Ear plugs

Reminder: You may not share your challenge with anyone on the team. You may respond to direct inquiries only.



Your Major Challenge is: “Arthritic” hands.

Materials You Need to Get from the Facilitator: A pair of gloves.

Reminder: You may not share your challenge with anyone on the team. You may respond to direct inquiries only.

Your Major Challenge is: impaired breathing.

Materials You Need to Get from the Facilitator: A breathing mask.

Reminder: You may not share your challenge with anyone on the team. You may respond to direct inquiries only.

Your Major Challenge is: You have limited command of English.

Materials You Need to Get from the Facilitator: None. If you know another language, speak it; if not, invent one.

Reminder: You may not share your challenge with anyone on the team. You may respond to direct inquiries only.

Your Major Challenge is: Impaired information processing.

Materials You Need to Get from the Facilitator: None. Interpret and give all directions as their exact opposite (*e.g.*, right becomes left, etc.).

Reminder: You may not share your challenge with anyone on the team. You may respond to direct inquiries only.

Your Major Challenge is: Impaired mobility of one limb.

Materials You Need to Get from the Facilitator: Magazines and tape to immobilize the limb.

Reminder: You may not share your challenge with anyone on the team. You may respond to direct inquiries only.

Your Major Challenge is: To play yourself as accurately as possible.

Materials You Need to Get from the Facilitator: None.

Reminder: You may not share your challenge with anyone on the team. You may respond to direct inquiries only.

Your Major Challenge is:

Materials You Need to Get from the Facilitator:

Reminder: You may not share your challenge with anyone on the team. You may respond to direct inquiries only.