Role Development and Negotiation Applied to Adventure Programming: A Bona Fide

Group Perspective

A thesis presented to

the faculty of

The Patton College of Education

of Ohio University

In partial fulfillment

of the requirements for the degree

Master of Science

Kaylilla J. Tufts

May 2014

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Role Development and Negotiation Applied to Adventure Programming: A Bona Fide

Group Perspective

by

KAYLILLA J. TUFTS

has been approved for

the Department of Recreation and Sport Pedagogy

and The Patton College of Education by

Bruce Martin

Associate Professor of Recreation and Sport Pedagogy

Renée A. Middleton

Dean, The Patton College of Education
Abstract

TUFTS, KAYLILLA J., M.S., May 2014, Recreation Studies

Role Development and Negotiation Applied to Adventure Programming: A Bona Fide Group Perspective

Director of Thesis: Bruce Martin

The purpose of this study was to determine what roles develop in an adventure programming context, how these roles are negotiated among the group, and what the implications of this process are for group functioning and task performance? Several scholars have identified the need to understand groups from smaller components that make up group development and group dynamics to better understand how educational outcomes are achieved (Beames, 2004; Ewert & McAvoy, 2009; McKenzie, 2000; Sibthrop, Paisley, & Gookin, 2007). A qualitative case study method was used by the researcher to collect data. In reporting the results of this study, two categories of roles emerged, formal and informal roles (Ang & Zaphiris, 2012; Benne & Sheats, 1948; Dexel et al., 2010; Kramer, 2002; Williams, Morgan, & Cameron, 2011). The study provides an interpretation of the data through the bona fide group perspective (Putnam and Stohl, 1990).
Acknowledgments

I would like to express my appreciation to Dr. Bruce Martin for his help in developing this project, providing me with this opportunity, and his support along the way. I am grateful for the assistance given by Dr. Laura Black for being a source of excitement and motivation for this project while providing access to a wealth of knowledge. I wish to acknowledge the help provided by Dr. Andy Szolosi in encouragement and support throughout the course of this project.
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Chapter 1: Rationale

I just want to say that I think I have personally been a little confused as to how much we are allowed to interact as followers. ‘Cause I know like, times today I had a conflict between myself. I was kind of like I think we should be doing something. I remember thinking well should I tell the leader, or should I stay back and let the leader do their thing and lead and potentially make their mistakes and learn from that.? Like, should I be a quiet follower, or should I try and be helpful and say like, hey, I think we should do this instead? But, I don’t know. It’s kind of a hard line to balance there, with being a follower and leader. I don’t know (Don, Personal communication, July 2012).

Role negotiation is defined as the process of discovering, understanding, and clarifying individual roles within groups (Wheelan, 2005). Role negotiation occurs during initial group interactions when new members join a pre-existing group or when role conflict occurs during the evolution of a group (Benne & Sheats, 1948; Jablin, 1985; Spencer & Pruss, 1997). During role negotiation there are many influences that are considered when assigning roles in a group, and they can be categorized as either external or internal factors (Parker, 1990; Spencer & Pruss, 1992; Stempfle, Hubner, & Badke-Schaub, 2001; Wheelan, 2005). External factors can be explained as the demands of the environment. The environment can include outside authority figures assigning formal roles, temporal constraints, and the availability of resources (Stempfle, Hubner, & Badke-Schaub, 2001; Watkins, 1997; Woodcock, 1989). Internal influences on role negotiation include the inputs individuals bring to the group which can include personal goals,
previous experience, other group members’ perception, or personality (Johnson & Johnson, 2009; Magerison & McCann, 1990; O’Connell & Cuthbertson, 2009).

The quote used to open this section is an example of a challenge that one group member faced during the process of role negotiation. The quote was retrieved from a recording from the data of this study. The speaker, Don, is an undergraduate, male student participating in a 26-day outdoor leadership course. The course emphasizes leadership development, and the students rotate through prescribed leadership roles daily during the course. This quote is an excerpt from a group discussion during the second half of the course. It occurred after the group had experienced a major transition at the midpoint of the course. The context of the group had changed from backpacking to sea kayaking. The pre-existing group also gained back members who were previously evacuated and received an addition of two new instructors. The format of assigned leadership roles was changed from a leadership team of five students to a co-leadership team of two, as well. All of these changes during the transition time altered the external and internal factors that influenced the group’s role negotiation process.

During this particular discussion, Don is referencing an instance from earlier that day in which two students on the co-leadership team almost missed the landing point as a result of having little experience leading a sea kayaking expedition. Don, along with other members of the group who held more experience, knew a critical mistake was about to be made. Don describes how he was unsure of how to act as a follower. Don feared both the possibility of missing the takeout and the possibility of being reprimanded by the instructors for overstepping the boundary of being a follower and a leader.
Don’s quote and the specific situation he referenced illustrate several external and internal factors that influence role negotiation. The external factors that can be identified are the assignment of roles by instructors, the environmental pressure of having a specific takeout, and the balance between formal and informal roles, such as leaders versus followers. Internal influences are identified as group members’ previous experience in a leadership role and/or sea kayaking, and individuals accepting or rejecting role responsibilities based on past experience. This quote is an example of a frequently discussed topic throughout the course. Don expressed conflict he felt during the role negotiation process due to the unique characteristics of an outdoor leadership group and its context. More specifically, it highlights several characteristics that support the complex process of role negotiation described by group communication scholars.

To help better understand the complex relationship between groups and their surrounding environment, the bona fide group perspective was developed by Putnam and Stohl (1990) in the small group research discipline. This perspective emphasizes the importance of the reciprocal relationship between the external environment and the inner group workings (Frey, 2003). Putnam and Stohl (1990) state that “…individuals, groups, and larger social systems exist in a symbiotic relationship in which each contributes to the others development” (p. 256). The criteria for a bona fide group rely on the relationship between internal workings and the environment and are described as “…stable yet permeable boundaries and interdependence with the immediate context” (Putnam & Stohl, 1990, p. 256). “Stable yet permeable boundaries” of groups can be identified as members having many roles that may conflict, acting as representatives of
other groups, changes to group membership, and varying levels of identity in the group. “Interdependence with immediate context” recognizes group-to-group interaction, along with the surroundings relationships with the group.

Putnam (1994) proposes the use of the bona fide group perspective on the basis of a number of different rationales. First, it allows for a rejuvenation of studying traditional topics with application to more practical groups. Second, using different groups in new contexts encourages interdisciplinary work, which can expand literature. Third, it allows for challenging traditional concepts that are not as applicable to natural groups. Finally, it focuses group research on the internal dynamics of groups. Groups are complex due to the internal workings of groups being influenced by external factors (Putnam, 1981; Putnam & Stohl, 1990; Stohl & Putnam, 2003). The bona fide group perspective centers on the complex relationship between groups and their immediate context (Putnam & Stohl, 1990).

Outdoor education includes an emphasis on learning through interaction with the natural environment and other people. According to Priest and Gass (2005), adventure education is one component of outdoor education. Adventure education focuses on interpersonal and intrapersonal relationships by utilizing “adventurous activities that provide a group or an individual with compelling tasks to accomplish” (Priest & Gass, 2005, p. 17). The aim of using adventure activities in adventure programming is to achieve cognitive, psychomotor, and affective outcomes. Affective outcomes include intrapersonal and interpersonal development. Intrapersonal development can be defined as individual, emotional growth, while interpersonal development addresses the
interaction of individuals, or the social relationships (Priest & Gass, 2005). As a result of the social interaction among individuals, adventure education promotes group development in order to attain the previously mentioned educational outcomes (Priest & Gass, 2005).

Walsh and Golins (1976) are credited with creating the Outward Bound Process Model. This model highlights the seven elements of an adventure experience as: a (a) learner or program participant being placed into a prescribed (b) social and (c) physical environment where he or she masters specific (d) problem solving tasks… the (e) instructor acts as a guide to ensure that the tasks are both authentic and manageable and provides necessary feedback to aid mastery, which in turn, leads to participant development. (Sibthorp, 2003, p.81).

Walsh and Golins (1976) place emphasis on participants who are motivated and open to learning from an adventure programming experience in a physically demanding environment. The physical environment that adventure programming uses must be interesting and unfamiliar to the participants in order to foster educational outcomes, according to Walsh and Golins (1976). Experiences in an outdoor setting allow actions to have natural consequences, rather than logical consequences created by an authoritative figure, such as an instructor. The physical environment also contributes to problem-solving tasks due to the participants’ perception of risk. As participants master the skills needed to accomplish tasks, learning occurs and educational outcomes are achieved (Priest & Gass, 2005; Walsh & Golins, 1976). There is focus on the social interaction within a group as well, as interdependency among group members emerges as
the group seeks to accomplish a common goal. Priest and Gass (2005) agree with Walsh and Golins (1976) that the social interaction within a group in an outdoor environment heavily influences the outcomes of adventure programming.

Sibthorp (2003) argues with Walsh and Golins (1976) that providing a social environment is a significant aspect of generating group interaction. In Sibthorp’s (2003) analysis of the Outward Bound Process Model (Walsh & Golins, 1976), he states that the different elements of an adventure program do impact individual outcomes. As a suggestion for future research, Sibthorp (2003) addresses the need for more research on how and why educational outcomes are achieved within the social and structural components of group process.

Beames (2004) concludes in a study investigating the elements of a 10-week expedition to Ghana, that the most influential aspect of the expedition was the “social environment where individuals are virtually in constant contact with members of their group” (p. 155). Sibthorp, Paisley, and Gookin (2007) would agree with the importance of group interaction based on their study looking at participant development during a National Outdoor Leadership School (NOLS) course. They concluded that group dynamics and development played a key role in educational outcomes of participants. While individual learning outcomes are acknowledged in literature focused on adventure programming, scholars still ask the question of why and how are these outcomes achieved (Beames, 2004; Ewert & McAvoy, 2009; McKenzie, 2000; Sibthorp, Paisley, & Gookin, 2007).
In the context of adventure programming, McKenzie (2000) states that research in the adventure education field is focused primarily on theory rather than evidence-based practice. McKenzie (2000) and Sibthorp and Ewert (2009) raised the question of studying different elements of adventure programs in order to understand how and why these outcomes are achieved to improve the practical use of adventure programming. In her review of literature, McKenzie (2000) identified the need for a more nuanced understanding of group development and group dynamics. Sibthorp and Ewert (2009) recognized many other variables that can affect educational outcomes, such as the “participants, program design, and individual program experiences” (p. 377). Sibthorp and Ewert (2009) acknowledged that in adventure programming some of the variables are accounted for and controlled to some degree but that there are also other variables that are outside of the scope of control and are not completely understood in the adventure programming context.

In their compilation of literature on groups in wilderness settings, McAvoy and Ewert (2000) concluded that “most research in this field is focused on benefits and very little research has concentrated on understanding the different components that make up the group wilderness experience” (p. 23). While there is growing research concerning theories of group development (Arrow, Poole, Henry, Wheelan, & Moreland, 2004; Beames, 2004; Chang, Duck, & Bordia, 2006; Chidambraram & Bordia, 2006; Dexel, Martin, Black, & Yoshino, 2010; Ewert & Heywood, 1991; Gersick, 1988; Mitten, 1995; Sibthorp, 2003; Sibthorp, Paisley, & Gookin, 2005; Tuckman, 1965; Tuckman & Jensen, 1977; Wheelan, 2005), Akrivou, Boyatzis, and McLeod (2006) claim that “existing
theories of group development have not treated the group as a complex system, thus they did not pay enough attention to certain aspects of the group development process” (p. 689).

McAvoy, Mitten, Stringer, Steckhart, and Sproles (1996) suggested that there is a need for further examination of the nature of group development in adventure programming. Others have also pointed to gaps in our understanding of how outcomes are achieved through adventure programming (Beames, 2004; Ewert, & McAvoy, 200; McKenzie, 2000; Sibthorp, 2003; Sibthrop, Paisley, & Gookin, 2007). For example, there has been a call to study structural components of group development to better understand how using groups in adventure programming contributes to educational outcomes (Akrivou, Boyatzis, & McLeod, 2006; McKenzie, 2000; McAvoy, Mitten, Stringer, Steckhart, & Sproles, 1996; Sibthorp & Ewert, 2009). Group structure results from the organization of group members into certain roles, role negotiation (Babad, Birnabum, & Benne, 1983; Forsyth, 2006; Haslett, Geis, & Carter, 1992; Lingren, 1997; McAvoy et al., 1996; Wheelan, 2005). The purpose of roles is twofold: (1) to create consistency within groups, while (2) maintaining flexibility as the group changes over time (Babad, Birnabum, & Benne, 1983; Cragan & Wright, 1991; Forsyth, 1983; Haslett, Geis, & Carter, 1992; Johnson & Johnson, 2003; Lingren, 1997; Wheelan, 2005).

This study is a response to this call. The purpose of this study was to develop a better understanding of role negotiation within the context of adventure programming. Using the bona fide group perspective for research focused on role negotiation in an
adventure programming group will contribute more evidence-based research in adventure programming on how outcomes are achieved.
Role Negotiation in Groups

Role negotiation is a process in which members of a group “discover, understand, and clarify individual roles” (Wheelan, 2005, p. 51). Essentially, role negotiation is a process of organizing and providing structure to a group. Role negotiation occurs during initial group interactions when new members join a pre-existing group or when role conflict occurs during the evolution of a group (Benne & Sheats, 1948; Jablin, 1985; Spencer & Pruss, 1997). During role negotiation there are many influences that are considered when assigning roles in a group, and they can be categorized as either external or internal factors (Parker, 1990; Spencer & Pruss, 1992; Stempfle, Hubner, & Badke-Schaub, 2001; Wheelan, 2005). External factors can be explained as the demands of the environment. The environment can include outside authority figures assigning formal roles, temporal constraints, and the availability of resources (Stempfle, Hubner, & Badke-Schaub, 2001; Watkins, 1997; Woodcock, 1989). Internal influences on role negotiation are what individuals bring to the group. Examples of internal influences include personal goals, previous experience, other group members perception, or personality (Johnson & Johnson, 2009; Magerison & McCann, 1990; O’Connell & Cuthbertson, 2009). In understanding role negotiation as a group process in more detail, a definition of a group should be provided.

Cragan and Wright (1991) identify a group from an interdisciplinary approach as “a few people engaged in communication, interaction over time, usually in a face-to-face setting, who have common goals and norms and have developed a communication pattern
for meeting their goals in an independent pattern” (p. 9). Forsyth (1983) describes groups as “two or more interdependent individuals who influence one another through social interaction” (p. 7). Johnson and Johnson (2003) define groups as…

… a number or collection of individuals who join together to achieve goals, are interdependent in some way, interacting with one another, who perceive themselves as belonging to a group, whose interactions are structured with a set of roles and norms, who influence each other, and who are trying to satisfy some personal need through their joint association.” (p. 15-17)

Along with their similar definitions of a group, Cragan and Wright (1991), Forsyth (1983), and Johnson and Johnson (2003) identify structure as a main component of group functioning.

Group structure is necessary for all groups to function and achieve goals. The specific characteristics of structure will vary throughout different groups, but generally all groups will have the same fundamental structure (Cragan & Wright, 1991; Forsyth, 1983; Johnson & Johnson, 2003). Johnson and Johnson (2003) define group structure as a “stable pattern of interaction among members” (p. 24). Forsyth (1983) understands structure as “underlying, stable patterns of relationships among group members” (p. 110). In the context of researching groups, Cragan and Wright (1991) explain group structure as “indirectly observable characteristics of small groups” and further describe structure as “predictable patterns of communication” (p. 9). All three of the previous definitions, are followed almost immediately with emphasis on the interpersonal interactions among group members. These interactions are understood to provide some organization and
predictability among groups to increase productivity and achieve goals (Cragan & Wright, 1991; Forsyth, 1983; Johnson & Johnson, 2005). Forsyth (1983) identifies three significant aspects of group structure; “roles, status, attraction role” (p.110). Now that a group has been defined, the process of role negotiation can be described.

Essentially, role negotiation is how roles develop within a group, beginning with defining role expectation, followed by assigning roles to group members (Benne & Sheats, 1948; Jablin, 1985; Spencer & Pruss, 1997; Wheelan, 2005). Roles can be defined as “a set of expectations, rights, obligations, and patterns of predictable behaviors that persons employ when occupying particular positions and can also be labels that people use to characterize themselves and other’s expectations within a group” (Babad, Birnbaum, & Benne, 1983, p. 211). Roles give structure and organization to a group by providing members with guidance on how to act in order to achieve group goals.

Supplying a group with boundaries and the ability to anticipate behaviors removes an element of chaos and provides predictability of group function (Cragan & Wright, 1991; Forsyth, 1983; Johnson & Johnson, 2003; Rothwell, 2004).

Traditional research on roles began with experimental, business groups in a controlled setting and focused strictly on leadership roles to understand group structure. Benne and Sheats (1948) were some of the first group scholars to study non-leadership roles. Their goal was to provide research to help improve group effectiveness. With the purpose of improving group productivity and management, Benne and Sheats (1948) studied experimental work groups. Through their research, Benne and Sheats (1948) created the Functional Group Roles. The Functional Group Roles identify 27 individual
roles divided into three categories: task roles, relational roles, and individual group member roles (See Appendix A). Task roles can be defined as individual roles that are related to tasks the group has decided to undertake. The purpose of this category of roles is to provide structure and organization to the group in order to successfully complete a common goal. Group building or maintenance roles are focused on individual group member needs and preferences that will help to maintain the function of the group through interaction and relationships. Although task roles are given more value than relational roles, both are dependent on each other for a group to function effectively. The third type of role is individual roles and is seen as negative or can be perceived as lazy or selfish by other group members. Unlike task and relational roles, individual roles do not focus on the group as a whole, but place the needs of the individual ahead of the group. Each category can be broken down into specific roles that group members will take on (Benne & Sheats, 1948).

Another way to negotiate roles are categorizing between formal and informal roles (Parker, 1990; Spencer & Pruss, 1992; Stempfle, Hubner, & Badke-Schaub, 2001; Wheelan, 2005). Formal roles are assigned to individuals by an authority figure such as a boss or an instructor. These roles can be randomly assigned without regard to members’ preference or skill, or they can be purposefully based on an individual’s previous experience, preference, and personality (Parker, 1990; Spencer, & Pruss, 1992; Stempfle Hubner, & Badke-Schaub, 2001; Wheelan, 2005). Informal roles naturally develop and are assumed by different members in the group without being assigned by an authority figure. In some instances informal role assignment is more beneficial to group function.
Allowing roles to naturally develop allows individual members to choose roles based on personal preference and skill. Using informal roles reduces the risk that members’ comfort levels and preferences will be ignored (Johnson & Johnson, 2009; Margerison & McCann, 1990; O’Connell & Cuthbertson, 2009, Parker, 1990; Spencer & Pruss, 1992; Stempfle, Hubner, & Badke-Schaub, 2011; Wheelan, 2005).

A third way to negotiate roles is through status. Status can be defined as how much influence a role has on the attainment of goals (Forsyth, 2006; Goffman, Johnson & Johnson, 2003; 1967; Wheelan, 2005). Groups create status hierarchies for roles in order to promote structure of roles. Typically, group members who are perceived as competent based on skill, knowledge, and physical characteristics, are valued more highly by the group and given roles that carry higher status (Freese, 1973; Hembroff, 1984; Johnson & Johnson, 2009; O’Connell & Cuthbertson, 2009). Leadership roles, for example, tend to have more control over group success and carry more weight in decision-making processes (Tabernero, Chambel, Curral, & Arana, 2009). People perceived as less competent by the group will receive roles that have a lower impact on achieving group goals (Johnson & Johnson, 2009; O’Connell & Cuthbertson, 2009; Wheelan, 2005). Members who possess roles with higher status in a group tend to receive greater levels of tolerance from the group, whereas individuals holding less status are typically given less tolerance from the group (Johnson & Johnson, 2003). Several studies (Belbin, 2010; Pugh and Wahram, 1983; Wheelan, 2005) have found that traditionally men are seen as having more power and control relative to women and are therefore typically given roles with more status within groups. Research has attributed this to the fact that women tend
to associate themselves more with socio-emotional aspects in groups rather than task-oriented roles (Hawkins & Power, 1999; King, 1995; Pugh & Wahram, 1983; Scotter, Sillers, & Renge, 2011). In situations where women take on masculine traits in a group, the perceived status gap between men and women has been known to shrink to virtually no difference (Hawkins & Power, 1995; King, 1995).

In order for roles to be effectively negotiated among a group there needs to be a clear definition of expectations for each role (Forsyth, 2006; Johnson & Johnson, 2009; Williams, Morgan, & Cameron, 2011). Role expectations are the foundation for the structure of a group by providing information about how members should interact and interpret specific behaviors for roles. Role expectations do not determine exactly how an individual should behave. This is because individuals enter groups with different experience. The interpretation of the needs of the group, roles, and perception of self can cause role expectations and behaviors to skew (Forsyth, 2006; Johnson & Johnson, 2009; Williams, Morgan, & Cameron, 2011). Because each individual is bringing a diverse set of characteristics to the group, is it likely that group members could take on multiple roles and even share roles with other members. This is identified as role differentiation (Bales, 1958; Johnson & Johnson, 2009; O’Connell & Cuthbertson, 2009; Woodcock, 1989). The more that role differentiation occurs, the more members will be enabled to take different roles while working on various tasks. This could potentially increase group productivity in fulfilling goals and performance (Luft, 1984; O’Connell & Cuthbertson, 2009; Senior, 1997).
It is crucial that role expectations are clear so there is no ambiguity concerning acceptable behaviors, thus providing structure (Ashford & Cummings, 1983; Bates & Cloyd, 1956; De Wever, Van Keer, Schellens, & Valcke, 2009; Forsyth, 2006; Goffman, 1967). Role ambiguity is the direct result of not having clearly defined role expectations (Babad, Birnbaum, Benne, 1983; Bates & Cloyd, 1956). Role ambiguity can be defined as the uncertainty of an individual group member toward a role as a result of lacking information or feedback from the group (Bates & Cloyd, 1956; O’Connell & Cuthbertson, 2009). This is typically seen in a newly formed group, where members are not sure of role expectations, group goals, or personal niche in the group. Role ambiguity also becomes a factor when new members enter into a pre-existing group. Both of these conditions are a consequence of having little experience and/or explanation about what is expected of the individual in the group (Babad, Birnbaum, & Benne, 1983; Bates & Cloyd, 1956; O’Connell & Cuthbertson, 2009). If role ambiguity is not addressed it can create conflict. Experiencing role conflict can lead to experiencing tension, less productivity, and member dissatisfaction and potentially leaving the group (Benne & Sheats, 1948; Parker, 1990).

Role conflict occurs when there is a misunderstanding of roles (Johnson & Johnson, 2009; Luft, 1984; O’Connell & Cuthbertson, 2009). There are two forms of role conflict. The first is intra-role conflict, which can be defined as an individual taking on multiple roles that contradict each other (Babad, Birnbaum, & Benne, 1983; Gross, 1958; Johnson, 2009; Luft, 1984; O’Connell & Cuthbertson, 2009; Rothwell, 2004). The second is inter-role conflict, in which there is a divide between the group’s expectations
and an individual’s expectation of a certain role. (Babad, Birnbaum, & Benne, 1983; Gross McEachern, & Mason, 1958; Johnson & Johnson, 2009) As stated before, role expectations allow for some leniency and do not determine exactly how an individual should behave. If a person deviates too far from the role expectations, then the group will most likely react negatively (Forsyth, 2006; Johnson & Johnson, 2009; Williams, Morgan, & Cameron, 2011). There are instances where role conflict can be detrimental to a group causing the group to disband and members leaving dissatisfied. In general, after experiencing role conflict, a group will move into role negotiation to redefine expectations and delegate roles to group members (Fisher & Gitelson, 1983; Parker, 1990).

**Bona Fide Group Perspective**

Most of the research concerning roles negotiation focuses on work-groups and improving productivity in business and management (Belbins, 1981; Benne & Sheats, 1948; Fisher & Gitelson, 1983; Hawkins & Power, 1999; King, 1995; Parker, 1990; Pugh & Wahram, 1983; Scotter, Sillers, & Renge, 2011; Williams, Morgan, & Cameron, 2011). Recently in the field of small group research, there has been a call to understand groups internally by considering the collaboration between the environment and the internal interactions of groups (Frey, 2003; Putnam, 1996; Putnam & Stohl, 1990; Putnam & Stohl, 1996). The amount of research focusing on groups in a more naturalistic, dynamic light, has contributed to the development of a better understanding of group organization and generating more evidence-based literature (Frey, 2002; Putnam & Stohl, 1990).
The bona fide group perspective was developed by Putnam and Stohl (1990) to study groups in a more naturalistic sense, rather than zero-history, laboratory groups. This perspective emphasizes the importance of the reciprocal relationship between the external environment and the internal group functions (Frey, 2003). Putnam and Stohl (1990) state that “…individuals, groups, and larger social systems exist in a symbiotic relationship in which each contributes to the others development” (p. 256). The criteria for a bona fide group play off of the relationship between internal workings and the environment and are, “…stable yet permeable boundaries and interdependence with the immediate context” (Putnam & Stohl, 1990, p. 256). Stable yet permeable boundaries of groups can be identified as members having many roles that may conflict, acting as representatives of other groups, changes in group membership, and varying levels of identity in the group. Interdependence with immediate context recognizes group-to-group interaction, along with the surroundings relationships with the group. The bona fide group perspective centers on the complex relationship between groups and immediate context (Putnam & Stohl, 1990).

Another external factor that can influence role negotiation are times of transition. Gersick (1988) discusses transitions in the context of a temporal midpoint of group life. At this point, Gersick (1988) claims that groups have the potential to experience a ‘paradigmatic shift’ (p. 32). Gersick (1988) describes this temporal transition as an alarm clock. This alarm raises awareness in the group that time is not an unlimited resource and that changes may need to take pace if the group is to achieve goals. This transition period can allow for progress and positive advances, but there also the
possibility that a group is unable to move forward and could in fact regress (Gersick, 1988; Miller & Freisen, 1984; Tushman & Romanelli, 1985). Gersick (1988) also places transition in a contextual framework. Emphasis is placed on knowledge and familiarity of resources gained from experience. At the transition the group decides how to further use what has been gained to achieve goals. Gersick (1988) also addresses change in context and creating a transition. He states that if a group is already in transition and the context changes, then the group will be successful at adapting, rather than if a group was dealing with only a contextual change. Gersick (1988) states that the “special challenge of transitions is to use a group’s increased information, together with fresh input from its environment to revise its framework knowledgeably and to adjust the match between its work and environmental resources and requirements” (p. 36).

A study conducted by Ang and Zaphiris (2010), looked at social role development in the virtual world of gaming. Ang and Zaphiris (2010) identified three social roles that develop within the gaming community. These roles were categorized on the spectrum of level of participation in the online “social guild.” The roles ranged from core players to members who participated on the periphery. For future research considerations, Ang and Zaphiris (2010) recommend extended the length of the study and further investigating nonverbal, behavioral communication rather than strictly chatting. The researchers claimed that with more time and a more in depth look at time, a greater understanding of the structural components of the roles and the gaming community itself can be achieved.

In Williams, Morgan, and Cameron’s (2011) research, another virtual group was studied. This time, the participants in the study were college students enrolled in online
courses. The students had to work as a group to complete assignments through email and chatting. Williams et al. (2011) identified six roles that were categorized similarly to that of Benne and Sheats (1948) functional roles, task, relational, and individual. The six roles included leader, wannabe, spoiler, agreeable enabler, coat-tails, and supportive worker. One major finding was that apart from individual roles being viewed as negative, most task and relational roles are only addressed by the positive characteristic of the roles. Williams et al. (2011), state that it is important for leaders to be aware of the negative consequences that task and relational roles can grow within a group. In their recommendations for future research, the influence of the instructor in assigning roles and introducing the concept of role development to the group seems to be of interest.

Kramer (2002) actually uses the bona fide group perspective (Putnam & Stohl, 1990) to study the communication within a community theater group in relation to balancing multiple roles. One major result of the study was dealing with role conflict as a result of having multiple roles from other groups, such as family and work. The presence of role conflict allowed for the researchers to uncover the some relational aspect of commitment level and temporal constraints on certain groups. It was also found that theater group members felt a certain sense of seriousness about their assigned, formal role, no matter the role’s degree of responsibility or influence within the group.

Johnson, Boster, & Palinkas (2003) studied social role development by exploring how relationships formed among group members working together at a South Pole station. These findings support Benne and Sheats (1948) original motivation of developing a framework for non-leadership roles. Johnson et al. (2003) reported that
there is a positive aspect of having individual roles and social roles that develop
informally within a group. The results state that social roles are crucial to create and
maintain the cohesion and culture of the group under formal leadership. After the review
of literature, it is apparent there is still need to expand small group research to other fields
and types of groups in order to understand group structure through roles.

**Roles in Adventure Programming**

As shown, there are numerous studies on role negotiation within groups. However, in the adventure programming literature focuses more on the study of group
development and dynamics (Akrivou, Boyatzis, & McLeod, 2006; Beames, 2004; Ewert
& McAvoy, 2009; McKenzie, 2000; McAvoy, Mitten, Stringer, Steckhart, & Sproles,
1996; Sibthrop, 2003; Sibthrop, Paisley, & Gookin, 2007). There is some adventure
programming research that has found roles to be significant to group development
(Debeames, 2004; Dexeel, Martin, Black, & Yoshino; 2010; Harrison & Connors, 1985;
Oddson, 2008; Thomas, 2010). However, none of this research has focused specifically
on the nature of role negotiation as a part of the process of group development.

Dexeel, Martin, Black, & Yoshino (2010) provide evidence that roles can have
positive and negative impacts on group development. The authors examined Tuckman’s
(1965) model of group development in light of observations of the process of group
development on a week-long sea kayaking expedition that occurred as part of an outdoor
leadership course. Dexeel et al. (2010) found that roles can be divided into three
categories: formal roles, informal roles, and task oriented roles. Dexeel et al. (2010) stated:
“student performance in these various roles significantly affected the functioning of the group both positively and negatively during the expedition” (p. 81).

Thomas (2010) falls into the pattern of early role research, focusing on the role the leader in outdoor education groups. Using reflection of a personal leadership experience, Thomas (2010), discusses the implications a leader’s behaviors have a group. There is emphasis on role ambiguity and role conflict observed by the reaction leaders get from groups in regards to desirable or undesirable behaviors. Since leadership is used as an educational tool in outdoor education, either through formal leadership assignments or facilitator as leader, this research could be expanded to include non-leadership roles to better understand roles with more status.

Furthering research on status, Oddson (2008) acknowledges the impact that status can have on group processes. Oddson (2008), reports that an individual’s perception of status can have a negative or positive impact on group function. In the results, this was related to role conflict and role ambiguity that influence an individual’s understanding of role expectations. Oddson (2008) also includes the relationship between status and leadership and the impact this has on a group. Oddson (2009) states that members with high status within a group who are in a leadership role are preferred by the group and will be more successful than those members who are of lower status in a leadership role. The latter pairing results negative reactions from other group members and lowered group functioning.

Finally, although this study does not specifically address adventure programming as a context, Harrison and Connors (1984) discuss the roles in groups in exotic
environments. Exotic environments are described as “marked by severe climates, danger, limited facilities and supplies, isolation from family and friends, and forced interaction with others” (p. 53). The provided definition could include the physical environment of adventure programming as identified by Walsh and Golins (1976), “the prescribed physical environment is...one the learner is not familiar with...highly stimulating, tempered by the presence of dangerous objects and conditions” (p. 4). Walsh and Golins (1976) also provide examples to outdoor environments such as, “the mountains, the sea, the desert, the swamps, and the plains” (p. 4) and emphasis the need for the environment to provide challenges and consequences for groups. While Walsh & Golins (1976) focus on outdoor education groups, Harrison and Connors (1984) use military submarine, NASA, and Antarctic exploration groups as examples in their article. Harrison and Connors (1984) ask whether roles should have clearly defined expectations or allow for loose interpretation. In this article, the authors also acknowledge the implication that role conflict can have on groups through negative role behaviors and what they term as “role overload” (p. 67).

Most of the studies described above did not have the initial purpose of studying roles, specifically role negotiation. Most of the literature reviewed reported on the significance of group roles in terms of their implications for group process. The implications were seen as negative or positive, and more questions were raised concerning the process of role negotiation when discussing role expectations, ambiguity, conflict, and how roles develop in general.
Statement of problem

The purpose of this study was to develop a better understanding of role negotiation within the context of adventure programming. The research questions are below.

- What roles develop in an adventure programming context?
- How are the identified roles negotiated among members of the group?
- What are the implications of the process of role negotiation on group function and task accomplishment?
Chapter 3: Methodology

Research Design

A qualitative case study approach was used to explore role negotiation and its implications for group function and task accomplishment. The researcher conducted a pilot study prior to data collection. The pilot study allowed the researcher to practice collecting data through field notes and audio recordings while also observing the implications of leadership roles and other patterns of behavior. As a result of the pilot study, the researcher became more efficient and accurate in data collection (Emerson, Fetz, & Shaw, 1995; Johnson & Christenson, 2010).

A case study approach was used to collect data, allowing for a more in depth understanding of roles as a structural component of groups. A naturalistic research design was used to allow for the researcher to act as a participant-observer while gathering qualitative data (Johnson & Christenson, 2010).

Case Description

A 26-day Outdoor Leadership course offered through a large Midwestern university was used as the case for the study. The students participating in the course received 12-credit hours toward graduation requirements for participating in the course. The purpose of the course was “to teach students the knowledge, skills, and dispositions required for effective outdoor leadership” (Outdoor Leadership Manual, 2012, p. 1). The Outdoor Leadership course curriculum was aligned with the seven core competencies as presented by the Wilderness Education Association Council on Accreditation. The eight core competencies are “judgment, leadership, outdoor living, planning and logistics, risk
management, environmental integration, and education” (Outdoor Leadership Manual, 2012, p. 2). To achieve proficiency in these competencies, various instructional techniques were used to facilitate student engagement. These techniques included experience in leadership, teaching, wilderness living, and expedition behavior.

Students were provided leadership experience through daily role assignments, including leader of the day (LOD), assistant leader of the day (ASLOD), navigator, smoother, and scribe. Students were required to be LOD at least twice during the trip. Students alternated through the assigned roles on a rotation. The first night of the trip, five students volunteered to be on the leadership team. Every night afterward, the LOD would exit the leadership team, the ALSOD would step into the LOD role, the navigator would take over the ASLOD role, the smoother assumed the navigator responsibilities, the scribe became the new smoother, and another group member would volunteer to join the leadership team as scribe.

Gaining teaching experience was another significant aspect of the curriculum. Each student was required to present three teaching topics to instructors and peers throughout the course. The lesson plans for the teaching topics were prepared before the trip. The teaching topics were 20-30 minute lessons ranging from general concepts, such as the history of outdoor leadership, to technical skills for wilderness living and travel, which included topics like stove lighting or map and compass.

Students were evaluated by instructors and peers on their performance teaching and in their leadership roles. Feedback was given after every teaching topic presented by a student. In the teaching role students were assessed based on delivery, content, and
style of the lesson. Leadership roles were critiqued at the end of every day during a group debrief. Prior to the debrief, students had time to reflect on the day in their journals, and were expected to focus on the performance of the LOD and how the group functioned during the day. The LOD also considered the itinerary of the day as leader and began the debrief addressing his/her strengths and challenges during the day. Following the LOD’s personal critique, other students identified the positive qualities and gave “gifts”, areas to improve on, for the LOD. The LOD then closed the debrief with a reflective activity for their peers and read a passage from books pertaining to leadership philosophy.

Behavioral expectations also contributed to the overall evaluation of students’ performance during the course. These expectations are defined as expedition behavior within the context of adventure programming (Drury, Bonney, Berman, & Wagstaff, 2005). Expedition behavior describes the expectations for how group members should act in order to function as a group. Expedition behavior can be characterized by awareness of others’ wellbeing through interaction, fair distribution of tasks, and conflict resolution, should conflict occur (Drury et al., 2005). There are four types of interrelationships identified within the context of expedition behavior, and they are: individual to individual, individual to group, group to individual, and group to group (Drury et al., 2005, p. 196). A Full Value Contract (FVC) was created on day eight of the course. The students used the FVC as a set of guidelines outlining the group’s expectations of good expedition behavior during the course.

The course included two expedition experiences: backpacking and sea kayaking. Both portions of the course were 10 days in length. Backpacking took place in the
The Canaan Mountain area of West Virginia and sea kayaking took place at Cape Lookout National Seashore in North Carolina. The additional six days included three travel days and three gear preparation days. By the completion of the course, due to changing expedition experiences, the group experienced wilderness living in the context of environmental transitions and constant interaction through cook groups and tent groups.

**Study Participants**

Students received 12 college credits for participating in and completing the entire course. Academic advisors and one pre-trip meeting informed the students of course expectations and the course itinerary. At the informational meeting, I offered a brief description of the study. Once in the field, before collecting data and beginning the backpacking session, I explained the study in more detail including the purpose, methodology, and implications for participating in the study. The potential risks of participating were explained to the students. Students were told that participation in the study was voluntary and would not affect their grade or participation on the course. Each participant was given an informed consent form outlining the study. Every student, along with instructors signed the consent form, in agreement with participating in the study.

**Participant Descriptions**

The participants in the study, including backpacking and sea kayaking experiences, totaled 16 people by the end of the course. The course began with 14 participants total, two instructors and 12 students during the backpacking portion. During the transition days the group collected two more instructors to assist during the 10 days of kayaking. Students on this course consisted of seven males and five females. In both
sections of this Outdoor Leadership course the expedition experiences in backpacking and sea kayaking varied from beginner to expert within the student population. What follows are individual descriptions of participants involved in the study. Pseudonyms were given to participants during data collection and analysis to maintain the confidentiality of the study.

The head course instructor was a male named Ace. Ace worked for two years in the academic recreation department as a temporary faculty member. I acted as Ace’s co-instructor for the course. I will refer to myself as Jane in the account that follows. At the time, I had recently completed the first year of an Outdoor Recreation and Education Master’s program through the university. Ace and I had a developed relationship before the course but became much closer during the preparation for the course.

During the sea kayaking portion of the course, two more instructors were added to the study’s participant list. Jack had just completed a 2-year Master’s program in the recreation department. Jack had an interest in whitewater kayaking and had some experience in climbing. He taught many of the students on the trip in multiple academic skill-based courses. Claire was senior undergraduate, graduating in December of the following semester. Claire was using her assistant instructor role on the course to meet internship requirements for graduation. Claire enjoys canoeing and works at the climbing wall for the university’s outdoor recreation program. Claire was a peer, classmate, and co-worker to many of the students on the trip. Both Jack and Claire were included on the sea kayaking section because of their sea kayaking ability and familiarity with programming area
Leila had moderate outdoor experience, most coming from ROTC training. Being a rising junior in the program, she had some outdoor experience through introductory-level skill-based classes, such as wilderness living skills. Other than expressing concern about her sea kayaking ability, Leila was confident in her physical capabilities during the course. This quote shows off Leila’s incredible work ethic, “I am trying so hard to put my all into this course.” Leila was focused more on the relational aspects of the trip as she revealed near the end of the course: “It will be hard to transition back to a world where I don’t have that person to sit with that understands.” Other than participating in the same Wilderness First Responder (WFR) certification course, I had no engagement with Leila before the trip.

Tessa, having just completed her junior year in the program, had moderate outdoor experience. During previous summers, Tessa was employed at a summer camp. She also participated in a week-long whitewater kayaking trip as well as introductory level skills-based classes such as wilderness living skills. Tessa’s dedication to the course is demonstrated in this quote listing some of her goals for the course, “Grow as a leader. Develop basic competency in everybody’s teaching topics. Ask questions if confused and practice skill even if asked not to.” I participated in the week long whitewater kayaking trip with Tessa, but had minimal interaction as we were in different groups. I was also in the same WFR certification course as Tessa two weeks prior to the trip.

Gwyn, beginning her senior year in the fall, is an active member in the recreation department. Gwyn was an undergraduate teaching assistant to several classes instructed
by Ace, including fundamentals of caving and other theoretical outdoor leadership based classes. Gwyn holds herself to a high standard and there was no exception for this as seen in this complimenting quote, “…Don’t beat yourself up over that too much. I wouldn’t say mediocre is how you’ve done at all. I think you’ve done excellent. You’re one of the top students on this trip.” I had a previously interacted with Gwyn in a class she was a teacher assistant for and in casually crossing paths in the department offices.

Jada, finishing up her junior year of college, was the student with the least outdoor experience in the group. She was aware of her outdoor skill level relative to her peers, as evidenced in this quote, “I’ve only ever truly worked with younger people with low skills, so it’ll be a new experience leading peers with the same, or in many cases, much higher skill levels.” As stated here and in the following quote, Jada’s lack of skill did not damper her enthusiasm of participating on the course, “I’m excited to be alone in this kind of context and be part of a learning atmosphere.” Before the trip, I was a student in a WFR certification course with Jada.

Sophie, beginning her senior year in the fall, was one of the more experienced participants on the course. Sophie worked for the university’s outdoor recreation program and climbing wall where she gained experience leading trips and teaching her peers. She was also a skilled whitewater kayaker and climber. With her experience, Sophie came into the course with confidence in her outdoor leadership and wilderness living skills. However, Sophie was not afraid to admit when she uncertain of her abilities, as described in this quote, “Backpacking it felt very much so like I was just kind of winging it, and hoping for the best…but with sea kayaking I felt much more planned
and prepared to lead for the day.” I was acquainted with Sophie before the trip, and had spent time whitewater kayaking with her.

Zach, a rising senior, was perceived as one of the more experienced students in wilderness living and leadership. Zach spent a lot of time in the outdoors with family members as he was growing up. He has taken many of the intro-level skill-based courses offered by the department and participated on the week long whitewater Kayaking course. Zach has also planned and implemented personal backpacking trips with friends and has experience working at a summer camp. Zach was more task focused during the trip and enjoyed being in leadership roles. He implies these qualities in this quote, “After being leader yesterday it was hard not to buy a hand in the decision process at all. It was even stronger not being able to voice my opinion or help out. This will be hard.” I had minimal interaction with Zach before the trip, other than a week long whitewater kayaking trip and simultaneous participation in a WFR certification course.

Charles, just completing his junior year, began the course with minimal professional wilderness living skills training. Charles enjoyed self-lead exploration to local areas and was familiar with the outdoors. On the trip, Charles consistently helped boost the morale of the group with his antics and found personal reward in assisting peers, as evidenced in this quote, “One of your biggest traits, if anyone needs help with anything, you’re the kind of guy who jumps in. Volunteer, or going around asking, is there anything I can do? I wanna’ help you do something. Which is really cool.” Prior to the start of the course I had no relationship with Charles.
Thor, a rising senior in the recreation department, came into the program with a background in biology. Thor perceived himself as less experienced because his original background was not in outdoor recreation, even though Thor had completed several of the offered introduction level skills-based classes. Throughout the course, Thor was a constant source of inspiration for the other students, as he was actively engaged in absorbing as much knowledge as possible, as described in this quote, “You’re a sponge, man. Starting last night, you wanted to make sure you knew as much as you could going into it, and you asked a ton of important and relevant questions to set yourself up for success.” I was an instructor to Thor for a wilderness living skills course and a classmate in a Wilderness First Responder certification course before the trip.

James, a senior and involved in ROTC, favored the leadership skills he learned from military training before the trip. James’s military career path was not directing him toward outdoor leadership, but James was participating in the course to make up credits missed during Basic Training. During the course, James provided subtle entertainment to the group and made an effort to support the group by achieving a high level of cohesion. James describes one of his goals for this course here, “I try to be physically upbeat all the time…And keep everyone together…you just try to encourage.” Prior to the course, I had no interaction with James.

George, a senior in the recreation department, was the most experienced student on the course in both leadership and outdoor leadership. Some of George’s passed experiences include mountaineering, climbing, and backpacking. His main career goal, upon finishing his Bachelor’s degree was to leading outdoor leadership courses with a
well-known organization such as Outward Bound. George had a strong sense of motivation to develop his outdoor leadership skills on this course, as he describes this goal, “To develop a sound mechanism of logical and rational decision making, unshakeable by environmental stressors and constraints.” I was an instructor for George on a wilderness living skills course and a classmate in a WFR certification course.

Will, just finishing his junior year, entered the course with climbing, fishing, canoeing, and backpacking experience. Will was actively involved in the outdoors through academic classes and personal trips. Initially on the trip, Will was a more reserved member, but quickly become a main source of entertainment and productive group member. This is evidenced by this description of Will, “I think you being light-hearted, and laid back, and using humor and entertainment, does a lot for the group dynamic. You’re a smoother for sure by nature, but also you are very active.”

Darwin, an academic junior in the recreation department, entered the course after just working as a counselor for a week-long camp for military youth. Darwin’s preferred outdoor activity is snowboarding. Darwin had transformational hopes for the program, but did not have a clear definition of the intrapersonal change that would occur. Here, Darwin vaguely states a course goal hoping for personal development, “To draw out things that are already a part of me that I don’t know are there yet.” Darwin and I participated in the same WFR certification course two weeks before the beginning of the course.
Data Collection

Data were collected during the backpacking and sea kayaking portions of the outdoor leadership course. Multiple methods of data collection were used, including participant observation, audio recordings of group discussions, participants’ journals, and course artifacts. I was a participant observer collecting data by observation and field notes. Field notes were documented throughout the day after making observations. At the end of every day, I provided detailed journal entries documenting group interactions via participants’ behavior and verbal and nonverbal interactions. Acting as participant observer and constantly observing, jotting field notes, and providing a thick description allowed me to experience and describe the environment and the interactions between group members more in depth (Emerson, Fretz, & Shaw, 1995; Glesne, 2006; Patton, 2002).

Audio recording was used as another form of data collection. The researcher recorded all formal group discussions, such as evening meetings where formal roles were assigned and most debriefing and group conflicts were discussed. The debriefs proceeded as previously described in the course description. When available, the recordings were backed up on a computer in case of equipment failure. Upon exiting the field, the researcher began transcribing the debrief recordings.

Another data source used was students’ journals. The students’ journals were a requirement of the course. The purpose of the journals was for students to document their experience, take notes for learning objectives, and evaluate the group processes. Occasionally during the course, journal prompts were utilized to assist students in
critically thinking about group functions such as decision making, as well as evaluations of themselves and peers in formal leadership roles. Participants had the freedom to label any entry in their journal as confidential with the understanding that it would not be collected as data. Journals were collected at the end of the course and were read and transcribed. Once all of the data was retrieved and transcribed, the journals were returned to the students.

Finally, course artifacts were used as a source of data. The main course artifact that was used for data was the course manual. The course manual provided the course outline, expectations for students, itinerary, and descriptions of the programming areas. Maps that contributed to useful data were also included as course artifacts (Johnson & Christenson, 2010).

**Data Analysis**

All of the data collected by the researcher was transcribed and totaled approximately 837 single-spaced pages. In the data, roles can be identified by patterns of behavior that become predictable or repetitive (Babad, Birnbaum, & Benne, 1983). While coding and interpreting the student journals and my field notes there were different patterns of behavior or thoughts that students and myself documented.

Data analysis began with open coding of the data. This involved reading every line of the transcribed data. While reading the data, concepts or roles were labeled as they became apparent in the data (Glesne, 2005; Patton, 2002). Identified concepts included the process of role negotiation and the impact on the group, along with different roles that were identified throughout the data. The next level of coding was axial coding
which involve the concepts being placed into categories in attempt to organize the data (Glesne, 2005; Johnson & Christenson, 2010; Patton, 2002). Factors that influence the categorization of the concepts are the context, how often, and any relationships that are developing between the roles. These factors took part in the analysis of individual pieces of data as well as the comparison of excerpts of different data sources in the context of specific events. The final step in the analysis was focused coding, which resulted in the definition of main themes formed from the categorization of the concepts. This coding process allowed me to develop the main themes in the collected data and to organize and write a holistic report describing the case study (Glesne, 2011; Johnson & Christenson, 2010; Patton, 2002; Stake 2010). By using the different levels of coding, open, axial, and focused, for data analysis and using a case study design for the study, I gained an in depth understanding of the data. This allowed me to ensure that relationships and explanations for the evidence are thorough and do not compete with other explanations (Johnson & Christenson, 2010).

**Credibility of Study**

Several steps were taken to ensure the credibility of the study. First, the researcher acted as a participant-observer and collected data via extended fieldwork (Glesne, 2006; Patton, 2002; Stake, 2010). Triangulation of the data was also used. Triangulation of the data was achieved through the collection and analysis of multiple data sources, including participant-observation and field notes, audio-recordings of formal group discussions, student journals, and course artifacts (Glesne, 2006; Patton, 2002). Finally, member checks were conducted to help ensure the credibility of the data.
Member checks consisted of conversations with participants in the study after data were collected and transcribed. These conversations included reflecting with students and instructors about data from student journals as well as observational data about various instances that occurred during the course (Glesne, 2006; Patton, 2002).

**Researcher Reflexivity**

It is important for me as the researcher to acknowledge my role as a participant-observer and instrument for data collection in this study. The researcher must be critically aware of the potential bias that she presents to the study as a consequence of being an active member of the group (Glesne, 2011; Johnson & Christenson 2010; Patton, 2002; Stake, 2010). It was important to minimize not only the potential for misinterpreting the data but also the potential to unduly influence the character of the group (Glesne, 2005; Patton, 2002). On the other hand, being immersed in the experience as a participant-observer, also served to enhance the credibility of the study (Glesne, 2006; Johnson & Christenson, 2010; Patton, 2002; Stake, 2010).

I was involved in extended fieldwork acting as a participant-observer. This provided me with an intimate knowledge of the group. Due to my previous education and experience in adventure programming, I gained easy access to the group and was seen as an ‘insider’ (Glesne, 2006; Johnson & Christenson, 2010; Patton, 2002). I found it challenging during certain instances, especially at times when the group experienced conflict, not to intervene based on my knowledge of group dynamics and how the group should function. Due to my personal interest concerning adventure programming, I immersed myself into the fieldwork with an understanding of the various ways in which
group processes might manifest themselves during this experience. Even though I had previous knowledge, I avoided memorizing specific role development and negotiation theories to eliminate pre-established ideas about this group. I wanted to avoid having these existing theories serving as heuristic frameworks through which I viewed the phenomena being observed in this study.

As one of the instructors, I was responsible for assigning formal leadership roles every day to the students. I also provided feedback to the students on their performance in leadership roles and on teaching topics. I was held accountable for carrying my own weight during group tasks, such as organizing gear and carrying my own load while hiking or paddling. Being in the instructor role, not only for this course but also for previous courses, I had pre-established relationships with several students before the trip. Sometimes it was difficult distinguishing between information that was verbally stated to me in confidence and what could be used as appropriate data. I also experienced similar challenges in documenting field notes this way as well. I had to rely on personal judgment to determine what information should be used as data.

When writing field notes, I occasionally included personal reflections concerning my emotions on the trip. These passages were typically during times of fatigue or frustration with helping to lead such an extensive expeditionary course. Also with field notes, most of my thick description was completed at night before bed. My field notes may have been better quality as data had I not rushed or been fatigued. However, during the entirety of the course I was constantly taking notes mentally or in writing to be compiled into my thick description at the end of every day.
I found it challenging to find opportunities to collect all of the desired data due to equipment and human error. For example, during the conclusion of one evening debrief, the audio recorder battery died. A few times, usually during rain or sitting in close proximity to the ocean, the background noise was too loud to hear and understand voices during transcription. There is also a gap in data concerning cook groups, tent groups, and cliques. This is a result of needing to attend to my basic needs as a participant of the trip such as eating and missing out on night time social interactions between participants while I wrote thick descriptions from field notes. Even though data collection and analysis proved difficult at times, my intensive involvement as an instructor of the course and participant-observer, allowed for a deeper understanding of roles as they develop and influence group function.
Chapter 4: Results

The following description of results is divided into four categories to efficiently address each research question. The first section addresses the first research question, describing six formal and informal roles identified within the data: leadership roles, follower, teacher, comedian, tough guy/girl, and venter. The second section addresses the second research question, discussing how roles were negotiated among the group members. Focus is given particularly to the transition in and out of roles and the daily change of formal roles. The third section addresses the third research question, discussing the significance of the process of role negotiation to group function and task accomplishment. This section emphasizes changes in individuals as well as the development and negotiation of roles throughout the course. Finally, the fourth section addresses the context the group in relation to the bona fide group perspective during the role negotiation process.

Formal and Informal Group Roles

**Formal roles.** The participants in this study were students on an outdoor leadership course. The course used feedback to evaluate the performance of students in roles that were assigned within the curriculum. The roles the instructor used to determine the quality of participant’s performance will be referred to as formal roles. For this study the formal roles include leadership roles, follower, and teacher. These roles were based on the curriculum outlined in the course manual. The curriculum used assignment of group roles as an instructional technique to provide participants with the opportunity to gain experience with outdoor leadership.
Leadership roles. The leadership roles within this group were the previously
described roles delegated to participants to provide leadership experience during the
course. The leadership roles were assigned by instructors. The roles made up the
leadership team and included leader of the day (LOD), assistant leader of the day
(ASLOD), navigator, smoother, and scribe. Participants were required to be LOD at least
twice during the trip. The assigned roles worked on a rotation. The formal role
expectations are defined by the curriculum and implemented by the instructors.
Participants received feedback from peers and instructors based on their performance in
the role.

Follower. Since it was an outdoor leadership course, it was necessary for some
students to take on the follower role to allow others to gain experience in leadership roles.
There is interplay between the follower role and the leadership roles as described by Ace:
“So, remember your job as follower is to empower your leaders; as leaders, your job is to
empower your followers.” This was an important role for the group and was included as a
point in the Full Value Contract: “Follow and support the leader.”

Teacher. As an outdoor leader, it is imperative to have the ability to teach. One
of the major elements of this outdoor leadership course was giving participants the
opportunity to teach three topics to the class. Students received feedback from peers and
instructors on how to better their teaching techniques.

Informal roles. Informal roles are roles that emerge within a group. These roles
relate to both task and relational aspects of the group. Evolving roles included the
comedian, the tough guy/gal, and the venter.
**Comedian.** While every student could have been described as the comedian at some point throughout the course, there were a few participants who took on the role consistently throughout the course. The comedian used humor, not in a distracting, negative way, but as a method to develop and maintain relationships among group members and to cope with the environment. The humor used by the comedians during the trip was usually inappropriate.

**Tough guy/girl.** The tough guy/gal in this group lacked in self-care, would fail to eat or drink water adequately, and would feel the detrimental physical and mental effects at the end of a leadership day or long paddle as a consequence. The participant would feel exhausted and would most likely need an instructor to care for them. The other form of tough guy/gal involved refusing to properly treat existing injuries. This could range from not wrapping blisters, refusing to take anti-inflammatory medicine for aching body parts or refusing to allow the group to assist in carrying gear to reduce strain on already irritated injuries. The justification for this behavior for this person would be placing the group needs before personal needs or not wanting to be “that guy/girl” who is unable to carry his or her own weight and keep up with the pace of the group. The mentality of this role led to many negative implications for the group.

**Venter.** A venter is a member of the group who uses the other group members as an emotional back-board. There were many variations of this role among the group. Some participants, such as Zach, shared his feelings of guilt being on the trip rather than with his grandfather. Darwin chose to process his recent breakup with a girlfriend by immediately turning to the group for emotional stability.
Role Negotiation within the Group

**Formal roles.** There were multiple times during the course that students were not meeting the expectations of formal roles and began treating the course as a vacation rather than the rigorous outdoor leadership course it was intended to be. When this occurred, the instructors had to intervene and redefine the requirements for a participant of the course. These situations were termed “little chats” during the course. Thor reflected on his deviance from expected participant behavior in his journal: “New objective= treat this like a real class because it is a real class. I am going to get the most out of this experience and not rip myself off.” Charles expressed surprise in his journal about Ace’s reiteration of role expectations to participants: “I’d really like to say that I was really surprised by your eye-opening talk with us. Do you remember it? I really felt woken up. I didn’t realize how much of a class this was.”

**Leadership roles.** Although these roles are clearly defined and structured, there was some variation in the level the students executed the roles. Status was a factor among the roles. More weight was given to the LOD and ASLOD in decision making, while the smoother was seen as a “superfluous” role and the scribe was not active in decision making. Participants’ previous experiences and levels of confidence in leadership roles also factored into the status that various roles held on different days. Participants perceived as having less outdoor living or leadership experience were less confident in taking on formal leadership roles and were not held in the same high regard as others within the group while in leadership role (Freese, 1973; Hembroff, 1984;

For example, Thor admits his low confidence level while in a formal leadership role and compares himself to other more experienced group members:

I don’t have the same background as everyone else and what I want it to be. And I find myself sometimes not wanting to follow myself, partly because of my lack of knowledge, hard skills, and soft skills, and other things that we learned in class.

Participants who were perceived as having lower status in a formal leadership role were often times questioned by peers, received passive-aggressive snide comments, or were harshly criticized in student journals.

I know that a lot of them have more experience in general than I do. Like earlier in the day, when I was LOD, I hit some snags like really early in the morning, and there were a lot of really snide comments made that I should have called people out on. I didn’t and I let them get under my skin a little bit. (Jada)

In opposition to Thor and Jada’s experience, George expresses his confidence in leading the group during the backpacking portion of the course.

I think this last section was easy for me because I’ve done a lot of backpacking. So all the hard skills, the living, cooking, setting up tents, tarps, packing a pack, basic knots, all that stuff comes very naturally to me. That was easy.

Participants who were given more status by peers were often times regarded as a “natural leader” and were questioned less and followed blindly by peers.
**Follower.** The follower role was often abused among the group with students overstepping the boundaries of the role either by taking too much control or taking no responsibility at all. Some students, like Will, were confused about how to balance the follower role with the needs of the group. For example, Will stated:

I just want to say that I think I’ve been a little confused as to how much we are allowed to interact as followers. At times I find I have a conflict between myself. Like should I be a quiet follower or a helpful follower?

It was common for instructors to verbally remind students of the boundaries of the follower role multiple times per day. What follows are excerpts of discussions during debriefs where the expectations for the follower were defined. Here, Jack tries to mitigate students’ confusion on how to balance the follower role.

You are trying to facilitate something useful. You are not trying to be a second leader. You’re trying to help facilitate that process and then realizing what’s in front and then allow the right decision to be made. And if you feel like an option is not here, you find a way to give them that option.

Gwyn, describes the role of the follower, and also receives feedback and guidance from Ace on how to assist the leaders without taking too much control.

Gwyn: To be completely compliant. Pretty much just do what they are told and be a good follower because we you can’t be a good leader if you don’t have good followers. Cause if you don’t have anybody following you then you’re not a leader obviously.
Ace: And there’s an asterisk beside that part. There’s a big part of followership, where if you disagree with the leader, where if you disagree and it’s not like, ‘Hey George, what the hell man?’ and it’s more like, ‘Hey George, I have a question,’ and you pull him off to the side and give him that sort of stylistic feedback.

**Teacher.** What follows are excerpts from participant journals. These excerpts are goals that that participants created in regard to the feedback they received from teaching topics.

Goal= rehearse my two remaining teaching topics so that I can raise the bar and change the tone of this trip. (Thor)

Develop better lesson plans- Include activities and test their knowledge of materials learned. Develop a basic competency in everybody’s teach topics. (Tessa)

The teacher was another role students found challenging because of a lack of preparation of lesson plans or inadequate surroundings for teaching. When students failed to meet the expectations of the teacher role, the instructor reestablished the expectations of the teacher.

**Informal roles.** Informal roles emerged during the course typically when the group or individuals were experiencing a challenge. Informal roles were found to most specifically develop when the group or individuals were challenged physically by the environment. These roles served to satisfy the mental and emotional needs of the group or individuals.
Comedian. Patterns of humor were identified in several journals during the first night of reflection. In these excerpts humor is used early in the course as a way for members to get to know each other. One member, Thor, even defined the balance between not being too inappropriate upon first meeting group members.

I toned down my humor and I think most of the others know that I am not serious. (Thor)

There is already a theme of crude humor arising—which should make for an interesting trip. (Will)

Comedians of the group also used humor to cope when the circumstances were not favorable for the group. Humor in this type of situation was used to dull the edge of harsh environmental factors, such as poor weather conditions or homesickness. One instance where humor helped the group cope with poor weather conditions was during an hour and a half long lightning drill, during which the group was stuck in a stinky shelter and group members were cold, wet, and hungry. It was noted in field notes: “Crude jokes during lightning drill.” Using humor to buffer downbeat situations complements other literature indicating that deviant behavior, such as vulgar or distracting humor, allows for an elimination of tension and avoidance of projection stress on others (Dentler & Erikson, 1959-1960; Johnson, Boster, & Palinkas, 2003; Johnson & Finney, 1986).

Another example of humor helping the group to cope was described when Leila was experiencing homesickness. Leila described her relationship with two other group members who consistently took comedian roles: “I am really starting to enjoy these people’s company. Especially George and Will. They’re like older brothers the way they
pick on me.” This idea of having a scapegoat to pick on within a group supports Johnson and Miller’s (1983) claim that the ability to joke around with other group members creates a stronger sense of belongingness.

When using humor during challenging situations, such as bushwhacking, several participants recognized that there needed to be an understanding of when to use humor or not. Here, Will described his process on restraining his tendency to make jokes in consideration of the moods of his other group members:

During that portion I was a little unsure of how I was going to handle the situation. I felt like me doing my normal humor, me trying to keep everyone happy with stuff would just kind of piss people off, so I just tried to tone it down a little bit more, just because I didn’t want to get on anybody’s nerves. At least for me personally, I would have rather just been left alone and get through it, rather than having someone cheery and bubbly in my face.

**Tough guy/girl.** As a participant on a 26-day outdoor leadership course, in which one is transporting oneself on foot and in self-propelled watercraft, there are physical challenges and the potential for injury. Unfortunately, there were numerous injuries during the backpacking expedition observed in this study. Injuries ranged from blisters covering the balls of Thor’s feet to Gwyn’s hip injury that stopped her from walking. Other injuries included the typical blisters, rashes, sore backs, shoulders, vomiting, and scrapes.

The experience of so many injuries and ailments so early in the course led to the development of the tag line: “Embrace the suck.” *Embrace the suck* intentionally meant
not complaining over conditions that cannot be changed, such as bug bites and rain. Instead, the group eventually began interpreting it not only as a charge not to complain but also to push your body to the physical limit. This attitude resulted in certain group members neglecting self-care and/or not accepting assistance from other group members to relieve injuries. These group members essentially fell into the trap of playing the tough guy/gal.

_Venter._ Other group members chose to speak to the instructors about emotional challenges and then turned to the group after initial conversation. Some examples of this describe Sophie discussing her father with the group.

And I am absolutely going to write about sharing with the group the whole sand castle thing yesterday. I have never shared something that personal in my life before with a group of people, except when my dad actually died. It’s not something I talk about very often or really share with a group this size. So you guys have really come to mean a lot to me, and really help bring out a new side of me that I wasn’t really sure I wanted to share. And I appreciate that, because it is important for me to remember each and every one of you.

Another example is Charles not wanting to discuss the details of his recent break up with the group. Both Sophie and Charles discussed the idea that they did not want to impose their problems on the group, and they did not want to have the group feel bad for them. Other students chose to keep their emotional issues confidential and only discuss them with instructors on the course.
This relational aspect of the group was framed by Ace when he described the group as “an outlet. We’ve created an atmosphere where we have an outlet for our frustrations, and maybe if we need to we can circle everybody up and vent for a minute or two like rehab.” Also Ace’s and the group’s affinity for transformational growth on the course made the group available to any member who wanted to vent.

The majority of the group is interested in transformational leadership. We also have a very strong contention in transaction. So, basically what that means for us, is if I am going to continue to have a transformational approach then for you transactional stuff this is going to be more important for how a group works.

**The Influence of Role Negotiation on Group Function and Task Accomplishment**

**Formal roles.** Formal roles provided the group with structure initially during the course. However, the group began to experience challenges during the last half of the backpacking because of confusion over the role expectations, which created frustration among the group. During the transition days and a break from strict formal role expectations, some of the formal role expectations were adjusted either by instructors or personally the students found motivation. This transition allowed for the students to maintain group and individual productivity until completion of the course.

**Leadership roles.** As the course progressed from backpacking to sea kayaking the structure of the leadership roles changed from a group of five formal roles to a co-leadership team. This alteration was to ensure that every student got at least two times in a LOD or co- LOD role. The purpose of the co-leadership team was to allow students to gain experience in meshing all of the leadership roles to develop their own style, as there
were only two students to take over the five leadership roles. The co-leadership teams were determined by the instructors on the second day of sea kayaking. Some pairs were placed together to have a successful day while others were determined based on underlying conflict or clashing leadership styles. The instructors assigned co-leadership teams by using judgment on how well the pair could work together to receive the most beneficial learning experience. Usually, the co-leadership teams had an even delegation of responsibility and few groups expressed minor feelings of “having their toes stepped on” by their partner. The following quote describes Will’s affinity for the co-leadership team:

It was kind of like reassuring myself and confidence and levels and everything. I think the co-leadership thing was cool. I think it allows people to have more confidence in their decisions because there is a kind of second leader to fall back on and talk to you if you do have any problems.

As mentioned in Will’s quote, one implication for the group was that students gained more confidence leading their peers in an outdoor context as the course progressed. In mid-term and final evaluation interviews, several students described having an increased level of confidence as leaders, in their outdoor living skills, and on a personal level as well. Several students illustrated this point. For example, George stated:

And early in the course it came off, not in a bad way, not like an arrogant way, but kind of like that. I think I’ve realized that I am even more confident in myself, and it that I am truly confident in myself, I shouldn’t have to act that way. It should come off me. People should just know, ok, he’s a confident leader.
Charles stated similar sentiments as well:

I feel a lot more confident with where I am at, and how things have been going. You guys have really done a good job to put a lot of that confidence in me and help me grow as a leader and a teacher. I never thought that I would ever be any good at teaching people things or sending people off on trips, but now I feel as though I really could facilitate some sort of gathering of people and the movement of them.

Some participants did not express an increased level of confidence but instead described a higher awareness of strengths and weaknesses. Leila addressed this during her final evaluation: “Mostly I just learned what I need to improve on and what I am already good at. Like I am detail oriented and organized, and good with people, but I need to be louder.” George also stated this as a valuable aspect of having formal leadership roles on the course: “I think one of the best things I have taken away from this course is being able to recognize, talk about, and work on my weaknesses.”

While there were many positive implications on the group as a result of formal leadership roles, Will expressed his frustration with the limited amount of time the course provided for the participants to be in the roles.

I think it’s kind of tough because I only get like two opportunities to actually be leader of the day, and, like me so far, I’ve only got that one chance with backpacking so it doesn’t really leave me a lot of time for me to reflect on being leader because I only got to do it once so far.
**Follower.** The group felt overwhelming frustration with the follower role as the course progressed from backpacking to sea kayaking. These frustrations were expressed as not having control over a situation. George worried: “I hope I can allow the leadership to function without my constant ‘advice.’” He expressed frustration later with this criticism: “I haven’t used my brain all day.” Zach admitted finding the follower challenging: “After being leader yesterday it was hard not to buy a hand in the decision process at all.” He then unleashed his true frustration: “It was murder to me on the inside because it was completely outside of my comfort zone to let someone else make the itinerary for me. I don’t fly with that. So it was already a little bit uncomfortable for me.” Even though the role of the follower proved to be a challenge and a point of confusion, students expressed some gain from the experience. For example, Leila wrote: “It’s so frustrating to not be able to have any say in what’s going on… I learned a lot about being a follower though.”

**Teacher.** During the first half of backpacking the students were not meeting the expectations. Ace put the role of teacher in the context of future employer expectations in this quote, “It’s difficult. You guys need to learn that in a heartbeat. Not only are we teaching you how to teach within your lessons, we’re teaching you these technical skills so that you can have transference.” After this defining moment, the participants rarely deviated from the expectations. Leila even included teaching topics when journaling about the purpose of this course: “Employers would want us to have mastery of all teaching topics and the ability to lead any type of group on a long expedition.”
**Informal roles.** Roles similar to these have been labeled as emergent roles. There was a considerable change observed from the beginning of the course to the end of the course among these roles within the group. Implications on the group from evolving roles were detrimental and beneficial depending on the context and role.

**Comedian.** In the transition from backpacking to sea kayaking, it was observed by several group members that the role of the comedian and use of humor had changed among the group. There were several conversations between group members discussing the comedic alteration in the group. One particular conversation involved Jada, Tessa, George, and Thor. These participants were waiting for a meeting to start on the third morning of sea kayaking, and the topic of a change in the group’s attitude was brought up. The major thing that Jada and George noticed was not only the group’s humor being less vulgar but also being less frequent. They talked about it for a few minutes, brainstorming the cause, but were unsuccessful at pinpointing an answer. Some of the ideas they were tossed around included the addition of two instructors to the course, improvement in the weather, diminishing the need to release tension, finding other ways to entertain themselves at the beach, such as swimming or looking at the ocean, and, the beach environment allowing for more personal space, giving the group members more freedom from one another. This corresponds with Arrow et al. (1984) finding that group dynamics change drastically as the context of the group is manipulated.

The first implication of the comedian role for the group was that some group members were offended by certain members’ sense of humor. An example of this was during George’s midterm evaluation where his peer evaluation noted: “humor and
sarcasm can come off rude to people who don’t know you.” This is also evident in Thor having to “tone down” his jokes on the first night because the group was just forming. The second implication of the comedian’s role for the group was relieving tension in the group. During backpacking, humor was used as a source of entertainment during lightning drills or hiking in the rain. In relieving tension, humor lightened the mood or directed frustration, in a light-hearted way, at things other than participants. The third implication for the group was contributing to cohesion and bonding of the group. Some group members, such as Leila, were the brunt of a lot of jokes. These group members encouraged the innocent fun. This allowed for the group to relax and become more vulnerable in a friendly atmosphere.

**Tough guy/girl.** One of the main consequences of the tough guy/gal role was having three medical evacuations during days six and eight of the backpacking portion of the course. These evacuations incredibly altered the course. The first evacuation was due to an existing hip injury. Gwyn woke up on the morning of day six of the backpacking expedition and complained of hip pain but persisted throughout the day without asking for help or verbalizing the actual level of her pain, even though she was urged to. Later in the afternoon, while looking for a campsite, Gwyn had an asthma attack. Once she was recovered from her asthma attack, Ace discovered she could not feel her foot and her hip pain was more intense than she was letting on. Ace began an immediate evacuation that began around 5:00 pm and ended at 4:30 am.

The implications due to this evacuation on the group threatened the safety of the group by worsening other injuries, such as the blisters on Thor’s feet. Ace also left the
field with Gwyn and this left only one instructor in the field, which is another safety issue. The itinerary was also changed to accommodate a lost day of backpacking due to rest day, and shortened days to rest injuries and get out of the field safely.

The second and third evacuations took place on day eight of the backpacking expedition. One was resulted from Zach’s untreated knee injury. Zach did not take anti-inflammatory medication, rest his knee, or ask for other group members to help distribute the weight in this backpack. The second was a large cut on Charles’ finger due to falling on a rock. Zach asked to be evacuated, and Charles was taken out of the field without choice at the same time to treat his injured finger and minimize the chance of infection.

After these two evacuations, the itinerary was altered and cut short. Leila expressed frustration because she felt like her experience was getting ripped off. The remaining members in the group also verbalized that the experience felt incomplete due to missing group members. George describes what the group was going through.

The dynamics of the group drastically, drastically changed when you guys left. Like noticeably. The mood in camp was just different. We had a good time the last couple of days, but it just wasn’t the same. We are not the full strength of a group without the four of you. Each of you add something to the group, and without you guys the group is just not the same.

Other group members felt a drop in morale and small responsibility for not recognizing group members needed help. Zach stated:
That shot my morale right in the nuts. My leader going down, because we didn’t do our best to take care of her. Cause you’re our leader and you’re supposed to take care of us, but we have to look out for you too.

Jada agreed, stating:

I felt like being ASLOD I should have encouraged you to drink more water and things like that. So, I feel a little kind of personally responsible for that, just cause I feel like that was my role.

During sea kayaking, the rate of serious injury and number of evacuations decreased; however, there were still some chronic injuries that continued to impact individual participants as well as the group as a whole, such as Darwin’s hand and back, Gwyn’s hip, and Zach’s shoulder. All of these participants still lacked in self-care but were more careful about testing their physical limits. The only implication for the tough guy/gal during the sea Kayaking portion was slowing the travel speed of the group down.

Beames (2004) addressed the relationship between being challenged physically and how that spills over into mental and emotional domains. For future research, understanding this relationship further in the adventure programming would be interesting.

*Venter.* The only negative implications of maintaining the venting role was frustration among more task-oriented or transactional group members. Here James expresses his frustration in an excerpt from his journal. “

“I feel the group changed a little bit. It’s a little more transactional leadership. It’s not that transformation is bad, but it is getting a little much like hippies
smoking weed all day and just talking about feelings and just too mush talking and not enough doing.

The effects of the venter were most apparent after participants shared an issue with the group. It created a group environment where participants felt it was safe to be vulnerable. Achieving this environment took some time and was not extremely apparent until the transition days before sea kayaking. Any time a participant acted in the venter role and brought an issue to the group, they were met with supportive and empathic statement such as, “you know we’re here with you,” “I’m sorry,” “stay positive,” and “keep your head up.”

**Role Negotiation within a Bona Fide Outdoor Leadership Group**

The bona fide group perspective (Putnam & Stohl, 1990) provides a framework to define the roles that develop within a group, while also understanding how the context of the group affects the development and negotiation of roles. The bona fide group perspective allows for the contextual elements of adventure programming to be incorporated into our understanding group function.

The stable features of the boundaries were developed vis-à-vis the purpose of the course and curricular expectations. These boundaries helped define roles by providing the group with behavioral expectations from instructors and peers. Examples of this include the provision of feedback in debriefs from instructors and peers and the curriculum, as outlined in the course manual, helped in the development of the formal roles during the negotiation process by providing the students with a definition and clear expectation of each formal role. Some boundaries were created using the Full Value
Contract, which contributed to the role negotiation process by establishing agreed upon guidelines or norms with which the students could regulate their behaviors. This allowed for the students to be more conscious of and responsible for theirs and their peers’ behaviors. An example of this is displayed in the following quote, said by Jane to the students during their final evening debrief during backpacking.

I just wanted to remind you guys that about the Full Value Contract. You guys said you wanted to read over it throughout the day, and that hasn’t really been happening. I don’t know who’s responsibility that should be, whether it be Scribe or LOD or whatever, but I definitely think you guys should get that going, especially since you guys are about to move into a huge transition time or getting people back hopefully and moving into a completely different section of the course that will probably change the entire dynamic of this group and your experience.

Because the roles were fluctuating constantly, the self-created boundaries also allowed for flexibility. This allowed the group to adapt throughout role negotiation. The self-created boundaries contributed to the role negotiation process by allowing the roles to be adapted overtime as the group changed. This happened during group debriefs as students and instructors discussed role expectations as the group evolved. An example of this is Ace giving advice during an evening debrief after a day of sea kayaking.

And I think what we maybe need to do is change our perspective a little bit instead of trying to redefine all of our roles. And try and help and support the leadership team in that type of way. And I think one of the ones on the Full Value Contract
that I liked was treating others how you want to be treated. How would you want to be treated if you were on the leadership team?

Another characteristic of the group that contributed to the permeable boundaries was the fluctuation of group membership throughout the course. During backpacking three students and one instructor left the field, while the remaining group members completed backpacking. On the tenth day of backpacking, the group was reunited and immediately after, the next day, the group gained two more instructors who brought new resources and knowledge to the group concerning role negotiation. The change in the group is described in George’s quote below.

My positive for toady is being reunited with the whole group, finally. Because I just want to reiterate this to Zach, Charles, and Gwyn, and Ace, people that haven’t been with us the last couple of days, I don’t know how much of this you’ve heard, but the dynamic of the group drastically, drastically changed when you guys left. Like, noticeably. The mood in camp was just different. And we had a great time these last couple of days. We really did have a good time, but it was just not the same. And we are not at the full strength of the group without the four of you. Not even close. You know each of you add something to the group, absolutely essential, and without you guys the group is not the same. It’s just not. And, I just want you guys to know that. Cause I don’t know if it’s been said to you guys enough or at all, but the group is much stronger to have you guys back. I think everybody agrees with that.
Although this quote does not directly mention the role negotiation process, it does strongly convey the change in the group while members were missing. George mentions the group dynamics changing “drastically.” This affects role negotiation as the process contributes to the structure and dynamics of the group. In the following quote, this idea is illustrated during an evening debrief in the beginning of the sea kayaking portion. This debrief took place shortly after Jack and Claire joined the group as instructors. Here, Jack is replying to a concern made by Will about the follower role.

Will: Yeah, I just want to say that I think I have personally been a little confused as to how much we are allowed to kind of interact as followers. Cause I know like, times today I had a conflict between myself. I was kind of like I think we should be doing something, and I remember thinking well should I tell the leader, or should I stay back and let the leader do their thing and lead and potentially make their mistakes and learn from that. Like should I be the quiet follower or should I try and be helpful and say like, hey, I think we should do this instead. But, I don’t know, like it’s kind of a hard line to balance there with being a follower and a leader. I don’t know.

Jack: It’s a hard line to judge. I think when you are looking at something like that, you need to figure out how severe are the consequences going to be for the group if you allow them to make that mistake. So, it’s a matter of weighing the consequences of whether it’s bad enough for the group to experience that, or if it is a minor inconvenience cause you’d rather do something else.
The instructors of the group could also be considered an environmental feature that affects the inner process of the group. The instructors of the group are constantly enforcing course expectations upon the students through evaluation and feedback. Other larger social constructions that are interdependent with the group are society as seen with the issues the venters would bring to the group such as homesickness, break ups, deaths. There is also the influence of future career goals. The course is designed to develop outdoor leaders, and that raises the question of what are students’ career goals and their purpose for being on the course. This is illustrated in a quote from Ace giving justification for the formal roles and how they will apply to the students’ potential careers as outdoor leaders.

For a lot of you, this is new stuff, and when you are in the position where you are leading clients in a group like this, you’ll know how to run the stove and it won’t be like shit where’s my lesson. You know you’ll have, so just remember this is the way this trip is designed is to distribute that, to give you the opportunity to dive deeper into each one of these roles to know what that looks like, so when you are the leader you’ll rock n’roll that.

Along with self-created environmental factors, the physical environment has a heavy impact on the interactions of the group. The obvious harshness of the natural environment impacted the dynamic of the group through morale by being unprotected from the elements of rain during backpacking and salt water and sun during sea kayaking. The nature of the course also implements an environmental transition from backpacking
to sea kayaking. This quote, preparing a student for the transition, emphasizes extreme changes that are experienced in the transition.

We’re about to get into a whole new set of experiences and challenges for the group, and it’s going to be change in a lot of things, and people are going to get pushed out of their comfort zones. Like, even backpacking, when we got rained on and crazy things happened, but this is going to be completely different. I hope that you can stay the way you are and kind of keep smoothing things over in the group. But I also hope that it pushes you in some further direction where you get a whole bunch of growth and learning from it.

This quote was an observation made about how leadership has changed among the group since beginning the sea kayaking portion.

Unfamiliar section of the course, there have been mixed reactions to the new skill of sea kayaking. Some have stepped up unto a more pronounced, informal leadership role, such as Sophie. Sophie is in a comfort zone with paddling so she now has knowledge she is comfortable with and more knowledge than most members in the group. This has given her more status in the group, thus allowing group members to consider her advice and ask/consult her for assistance or direction. Sometimes, Sophie does not even know or have the right answer, but the group has taken a more dependent relationship with Sophie. Also it should be noted that members that had status before on backpacking no longer speak up as much now. Mainly, it is George and Zach. They are both aware they lack knowledge and experience with sea kayaking, so they cannot provide the group
with as much information as they used to. Both guys still play a major in leadership in the group, but technical skills based they are not as beneficial.

Along with transition, the group gets to experience a defined midpoint of the course. According to Gersick (1988), a temporal midpoint in the life of a group is a crucial time and should be used to remind the group of the underlying foundation that creates the boundary for the group. This midpoint marks the temporal context of the group and causes changes in the dynamics and role negotiation process of the group. George describes this in his journal on the night of backpacking.

Ace cautioned us to not ‘check out’ early from the trip. And I’m going to try my best not to. It’s not even the desire to be back in the ‘real world.’ It’s just the desire to talk to a few people whom I miss. That’s why I feel like the travel day will really help me focus and re-commit to the trip as a whole. I don’t want to say the rest of the trip is a wash, but it certainly feels that way right now. I think everyone is just focusing on getting through backpacking and starting fresh on sea kayaking. The whole dynamic of the group has changed. Camp has been quiet, somber, but very happy to be nearing the end. I can say that I am very tired today. I am, not sure why, probably from the eight days of backpacking simply taking their toll.

Observing a group’s progression by time, can show the role negotiation process of a group. For example in the group studied, the informal roles changed over time resulting in altered behaviors of group members. Having time to observe the formal roles allowed for the relational development of the group to be reported, such as confidence in
group. By taking the external factors and acknowledging the interaction with the inner group dynamics this can allow for a deeper understanding of both aspects, which will generate more of an understanding of not only groups in the adventure programming context, but also role negotiation in groups in general.

**Summary**

Six roles were identified from the data. The six roles were divided into two categories: formal and informal. The formal roles included leadership roles, follower, and teacher. The informal roles included comedian, tough guy/girl, and venter. These roles were usually negotiated when the group was experiencing conflict from daily rotation of roles or a unique challenge. Feedback from peers and instructors during these instances contributed to the role negotiation process. The process of role negotiation affected group function and task accomplishment by providing structure, creating conflict, or being used as an outlet. The implications of negotiation on the group typically depended on the context. Analyzing the data from the bona fide group perspective allowed for a better understanding of role negotiation relative to the context of the group. Through the lens of the bona fide group perspective it was apparent that environment and time influenced the role negotiation process as evidenced by the evolution of the group.
Chapter 5: Discussion

The purpose of this study was to better understand the roles that develop within the context of an adventure programming experience, the process of role negotiation among members of a group within this context, and the significance of the process of role negotiation to group function and task accomplishment. The data were analyzed in light of the bona fide group perspective, that is, the idea that group roles consist of “stable yet permeable boundaries and are interdependent with the immediate context” (Putnam & Stohl, 1990, p. 256). The bona fide group perspective allows for the contextual element of adventure programming to be incorporated into our understanding of group function. The following is a discussion of the findings of this study as well as some of the more interesting insights that emerged while analyzing the data.

Both formal and informal roles emerged within the life of this group. Formal roles were those prescribed within the course curriculum. Formal roles included leadership roles through which students rotated on a daily basis, follower roles held by students not serving in a leadership role on a given day, and the role of teacher. Informal roles included such roles as the comedian, ‘tough’ guys and girls, and the venter. There were numerous roles identified in the data that could have been highlighted in the results (Shaw, 1981). Examples include the role of supportive worker versus the role of spoiler. Limiting the number of roles reported to those that there were unique and significant to this group was necessary to allow for a more in depth description of these roles. The intimate narrative of the roles allowed for more in depth discussions of the second and third research questions.
With regard to the process of role negotiation within the context of this experience, the researcher did not anticipate the interesting dynamic that the curriculum would create within the group. Because the formal roles are defined as part of the course curriculum, it was surprising that participants experienced such ambiguity and challenge in these roles. This could be due to such a quick turnover in the roles from day to day resulting in constant negotiation and potential role conflict, as indicated by Sibthorp et al. (2007) in their analysis of participant development in a NOLS course. This finding calls into question the efficacy of this element of the course structure. Is there an alternative curricular structure that could help reduce the sense of ambiguity and role confusion that students experience as a result of frequency with which roles change hands within the group? Is it possible to accomplish curricular goals while creating a more stable sense of role identity among participants within the group? Perhaps allowing students to occupy formal roles for longer durations of time would reduce the level of ambiguity that students felt during this experience. This is a point that should be considered further in future research on educational programs such as this.

The influence of the transition from backpacking to sea kayaking on the informal roles that emerged within this group is another finding that merits discussion. This could be supported by the change in environment, length of time, and the constant social environment of the group (Walsh & Golins, 1976, Gersick, 1988). Gersick (1988) found that major changes that take place during the midpoint of a group’s life can foster more development within a group or can be detrimental to the group achieving goals. In this outdoor leadership group, the environmental change from backpacking to sea kayaking
took place at the midpoint of the course. There was not a consistent pattern of change among informal roles when considering the environmental transition. However, when group members are analyzed independently there was change in behaviors of how informal roles were implemented individually. An example of this is as a tough guy/girl. Those members who were vigilant at attending to physical injuries and illness during backpacking became less attentive and lacked self-care while sea kayaking. In both sections, these students expressed equal stress about not holding the group back, but behaved in opposite manners. Other members who lacked self-care earlier in the trip during backpacking, seemed to become more cautious about their physical limitations while sea kayaking. These students appeared to understand the importance of taking care of one’s self for the good of the group even it meant being pulled by another kayak or carrying less gear. Another interesting finding was roles seen in an atypical perspective. For example, in Benne & Sheats (1948) Functional Group Roles, the playboy/girl is seen as a negative, individual role. The role the comedian played in this group, reduced tension and prevented conflict while also creating cohesion among group members.

**Future Research**

An area for future research concerns the influence of the social and physical environmental elements of the experience on the structure and process of the group. A variety of groups have made an appearance into small group research such as theater groups (Kramer, 2002) or online student groups (De Wever et al., 2009). The physically demanding environment and continuous social interaction among group members on an outdoor leadership course provides a unique setting for a group. In future research, it
would be interesting to delve into the function and process of groups with a similar social and environmental context of an outdoor leadership group.

Another area for future research concerns the influence that instructors have on the process of group development. During the analysis of this study, there was an obvious impact the instructors had on the behavior of the students and the function of the group through authority of evaluation and assigning roles. A related point was the evolving dynamic among the subgroup of instructors as a result of previous working relationships, level of responsibility, previous instructor experience, and the adding and subtracting of instructors. In future research, another point of focus could be on the dynamic of an instructor group and how this impacts group function and process.

It would also be interesting to explore the character of group development and the process of role negotiation within the context of certain discrete situations within the broader scope of an adventure program experience. For example, further consideration could be given to this process as it occurs during times of crisis or transition. In this study roles were negotiated differently during times of crisis, such as student evacuations, than in normal daily routine. During the evacuations, roles were hastily assigned by instructors. These role assignments were sometimes based on the accessibility of a student, such as being nearby to receive instruction. Other times, students were assessed on how capable they were to help the group in the given situation. Instructors considered students based on physical abilities and competency. Following an evacuation students who were not assigned roles expressed feelings of inadequacy and wanting to help more. Students who were assigned roles were given more status among the group. To gain a
more in depth understanding of times of crisis or transition would not only expand
knowledge on these specific instances, but would allow for more knowledge on how
these different circumstances can affect a group following the occurrence.

**Limitations**

A potential limitation of the study concerns the data collection methods. As stated before, it is difficult to understand the impact of a participant observer upon the behaviors of group members being observed. The researcher was accepted as an insider to the group and gained an intimate knowledge of the group during extended fieldwork.

Data triangulation was used via observation and field notes, audio recordings of group discussion, student journals, and course artifacts. Member checking took the form of reflective discussions with participants following the course.
References


### Appendix A: Benne and Sheats (1948) Functional Group Roles

<table>
<thead>
<tr>
<th>Benne and Sheats’ Team Roles (1948)</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Role</strong></td>
<td><strong>Function</strong></td>
</tr>
<tr>
<td><strong>Relationship Roles</strong></td>
<td>Build and maintain groups</td>
</tr>
<tr>
<td>Encourager</td>
<td>Offers praise and agrees with contributions of others</td>
</tr>
<tr>
<td>Harmonizer</td>
<td>Mediates or reconciles differences and relieved tension</td>
</tr>
<tr>
<td>Compromiser</td>
<td>Tries to reach common ground through yielding, admissions or error, or discipline self or others</td>
</tr>
<tr>
<td>Gatekeeper/ Expeditor</td>
<td>Regulates communication by keeping channels open or facilitating participation</td>
</tr>
<tr>
<td>Standard setter</td>
<td>Sets the bar for the group behavior or evaluates group performance and processes</td>
</tr>
<tr>
<td>Group observer/commentator</td>
<td>Records group processes and provides feedback on group performance and processes</td>
</tr>
<tr>
<td>Follower</td>
<td>Passively accepts the movement of the group</td>
</tr>
<tr>
<td><strong>Task Roles</strong></td>
<td>Facilitate and coordinate group efforts</td>
</tr>
<tr>
<td>Initiator/ Contributor</td>
<td>Suggests new ways of group thinking</td>
</tr>
<tr>
<td>Information seeker</td>
<td>Asks questions to clarify quality of information</td>
</tr>
<tr>
<td>Opinion giver</td>
<td>Offers personal views on values surrounding group processes or actions</td>
</tr>
<tr>
<td>Elaborator</td>
<td>Describes alternatives by offering rationale for options</td>
</tr>
<tr>
<td>Role</td>
<td>Function</td>
</tr>
<tr>
<td>----------------------</td>
<td>---------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Coordinator</td>
<td>Pulls ideas together by clarifying relationships among suggestions</td>
</tr>
<tr>
<td>Orienter</td>
<td>Tries to keep group headed in right direction by questioning decisions and solutions to problems</td>
</tr>
<tr>
<td>Evaluator/Critic</td>
<td>Assesses group outcomes through comparison standards</td>
</tr>
<tr>
<td>Energizer</td>
<td>Calls the group into action</td>
</tr>
<tr>
<td>Procedural technician</td>
<td>Attends to the logistics of group functioning such as seating arrangements, copies, and so on</td>
</tr>
<tr>
<td>Recorder</td>
<td>Takes notes for the group</td>
</tr>
<tr>
<td>Individual Roles</td>
<td>Fulfill needs of individual group members</td>
</tr>
<tr>
<td>Aggressor</td>
<td>Negatively affects group processes by deflating status of others, joking excessively, and so on</td>
</tr>
<tr>
<td>Blocker</td>
<td>Resists group decisions and actions</td>
</tr>
<tr>
<td>Recognition seeker</td>
<td>Calls attention to self though bragging or talking about personal achievements</td>
</tr>
<tr>
<td>Self-confessors</td>
<td>Uses group to talk about personal ideologies not related to group</td>
</tr>
<tr>
<td>Playboy/girl</td>
<td>Displays lack of engagement with group through inappropriate behaviors</td>
</tr>
<tr>
<td>Dominator</td>
<td>Manipulates group or members in an attempt to assert authority</td>
</tr>
<tr>
<td>Help seeker</td>
<td>Tries to gain sympathy from other group members</td>
</tr>
<tr>
<td>Special interest pleader</td>
<td>Advocates for a particular issue without regard for other points of view</td>
</tr>
</tbody>
</table>
Appendix B: Designated Roles of Course Participants

### Designated Roles of Course Participants

<table>
<thead>
<tr>
<th>Role</th>
<th>Function</th>
<th>Intended Learning Outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leader of the Day (LOD)</td>
<td>Managed group, created daily itinerary, lead the designated day</td>
<td>Develop outdoor leadership skills</td>
</tr>
<tr>
<td>Assistant Leader of the Day (ASLOD)</td>
<td>Assist in the leader of day responsibilities</td>
<td>Develop outdoor leadership skills</td>
</tr>
<tr>
<td>Navigator</td>
<td>Focused on navigation, assisted leader in navigation</td>
<td>Develop navigation skills, and gain leadership experience</td>
</tr>
<tr>
<td>Smoother</td>
<td>Responsible for interpersonal aspects of the group, provided extra assistance to group members, responsible for not allowing group to spread out</td>
<td>Gain experience in dealing with group issues and managing the group</td>
</tr>
<tr>
<td>Scribe</td>
<td>Responsible for writing the itinerary of the day and taking notes during the day in the scribe journal</td>
<td>Gain experience in monitoring group and noting significant aspects of the group throughout the day</td>
</tr>
</tbody>
</table>

(Adapted from Dexel, 2009, Unpublished Master’s Thesis)