

# MOUNTAIN CHALLENGE, LLC: THE MAKING OF A COVENANT

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## INTRODUCTION

In June of 2007, the Association for Challenge Course Technology (ACCT) published an addendum to their 6<sup>th</sup> edition that included practitioner certification standards. These standards addressed the competency and professionalism of challenge course providers and staff. They included requirements for providers to develop staff certification programs and for certifying staff to various levels of competency and requirements.<sup>1</sup> The ACCT had been founded in 1993 to develop and promulgate standards for challenge course use, design, and safety, and to encourage use of challenge courses for various training purposes.<sup>2</sup> Challenge courses are better known as “ropes courses” and have been an evolving form of individual development and training since the early 1980’s when providers of wilderness experiences (such as Outward Bound) began offering fixed site rather than expedition experiences.<sup>3</sup>

Challenge courses include rigorous “elements” – structured tasks or problems involving physical, mental, and emotional challenges that groups or individuals are presented with, and attempt to accomplish. A critical dimension of challenge courses is the debriefing, or facilitation, that occurs after the completion of an element. The debriefing, best done by a skilled, experienced, and well-trained facilitator, is a cognitive probing into the nature of the experience and reflection on possible lessons learned. In fact, a meaningful debrief adds immensely to the educational value of the experience and so, skilled facilitation is important. Since this is highly dependent on the competency of the challenge course staff or practitioner, an attempt, such as the ACCT certification standards, to assess competency in this area is not surprising.

The certification standards had been in development for several years, and like all ACCT standards were intended to set the industry benchmark for good practice. As the standards were being introduced, Mountain Challenge, LLC was in the midst of celebrating its twentieth year, but founder, Bruce Guillaume, was characteristically thinking hard about the next twenty. On his mind were issues of succession and growth, but an issue of particular concern was the apparent commoditization of the challenge course experience. Twenty years earlier, when Mountain Challenge was founded in 1986, outdoor adventure challenge training was a novelty. Since that time, more and more courses had been built, many more corporations, organizations, and groups had utilized challenge courses, and it was easier and easier to find executives who had been through the experience. The attempt to promulgate practitioner standards and certification requirements was recognition of this commoditization, and Bruce was concerned that such standards might legitimate mediocrity. He knew that the Mountain Challenge approach was different, and he was not only interested in maintaining that difference, but also with insuring that it remained a part of the Mountain Challenge ethos and culture for a long time to come.

In response to this growth, and in particular to the existence of practitioner and certification standards, Bruce and his staff developed the Mountain Challenge covenant. The covenant defined the nature of everyone’s association with Mountain Challenge and aimed to preserve the Mountain Challenge way. Bruce was satisfied that the covenant was a better approach than certification.

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## THE FOUNDING OF MOUNTAIN CHALLENGE

Bruce Guillaume came to Maryville College in the 1970's as a student and, as an athlete. Growing up in central Ohio, he had played, among other things, baseball and basketball for his local high school and after visiting a high school friend who had moved to east Tennessee, Bruce decided to play basketball while attending college at Maryville. It was here that he had an experience not uncommon to athletes; the experience of effortlessly playing well, of every move being the right move, and of no disconnect between mind and body. Athletes (and others) refer to this a flow experience. That this experience occurred during a team loss gave Bruce reason to question his personal enjoyment of team sports. In fact, in back to back basketball games during his senior year, Bruce had diametric experiences related to his individual performance and the team performance. In a team losing effort, Bruce has a flow experience and consequently a great game. The next game the team won but Bruce scored zero perhaps his worst game individually ever.

In this frame of mind and under the encouragement of some mentors he began pursuing individual sport; running in particular. Through the balance of his collegiate years and on into graduate school, Bruce continued his individual athletic endeavors. In addition to athletics, the move to Maryville to attend college also allowed Bruce to spend time in the mountains. With the encouragement of a friend, he began to run in the mountains, and then to lift weights, hike and take karate. Graduate school also brought him the realization that personal responsibility and personal judgment were paramount ingredients for success and a life-long suspicion of rules and policies that purport to do one's thinking for oneself.

After graduate school Bruce went to work for Outward Bound in North Carolina, but soon tired of the long commute, and began conducting outward bound and ropes type course closer to home at Wesley Woods, a summer church campground in Walland, Tennessee. There he ran a ropes course for the newly appointed president of Maryville College, and several members of the president's staff. The president later approached Bruce about establishing a course on campus, and eventually armed with a grant from Brunswick Corporation, Mountain Challenge was born in 1986. Mountain Challenge was almost immediately involved in the curriculum of the college but was also established as a private business to offer corporate training.

## MOUNTAIN CHALLENGE MILESTONES SINCE THE FOUNDING

*"We provide high quality, safe, outdoor experiences designed to change the world for the better, one person at a time."<sup>4</sup>*

In 1991, the mission statement articulated above was developed and was supported by what Mountain Challenge called first principles. The definition of a first principle is a tenet that is so true and right that it cannot be debated.<sup>5</sup> Mountain Challenge's first principles articulated the following.

***"Safety*** - People perceive some of our activities as dangerous. Sometimes those perceptions are accurate. Because there can be real danger involved, we take extraordinary safety precautions. If our participants don't feel safe, nothing else will happen. We rely on our staff to make sound safety judgements.

***Quality*** - We insist on quality in everything that we do. Yvon Chouinard said, "Quality is not something that can be pursued piecemeal. Either you believe in it or you don't; either it surfaces everywhere or it likely won't be seen anywhere." For us, certain links have become obvious - between the quality of our courses, customer service, our workplace, and the lives of our staff. If we miss any piece, there is a good chance that we'll miss it all. We embrace high standards."<sup>6</sup>

In 1993 the Alpine tower was constructed adding entirely different dimensions to the challenge course opportunities Mountain Challenge could provide. By 1996, virtually all of the people who had been part of Mountain Challenge up to this point had left to pursue different directions in their lives. All of them remain connected or shaped in some way by their experience with Mountain Challenge, but with this complete turnover in personnel, Bruce began to try to capture and retell the founding

story and emphasize the mission and first principals. During this time, which also saw the initial development of five year planning, Mountain Challenge articulated a set of secondary principles. Those principles included having fun, establishing difficult goals, viewing adversity as a challenge, fostering flexibility, growing and caring for Mountain Challenge staff, believing in what they do, and working to create loyalty.<sup>7</sup>

During this time, Mountain Challenge grew and served more participants each year. (Exhibits 1 and 2). Revenue increased each year until September 11, 2001 proved to be a critical and pivotal event. The affect on Mountain Challenge was dramatic they saw considerable fourth quarter business evaporate as corporations cut spending. They also established their first ever line of credit.

Mountain Challenge operates in two separate but quite related industries. Challenge course providers do sometimes perceive themselves as an industry unto themselves and as such provide experiential learning opportunities to a wide variety of clients including, children, students, at risk populations, school groups, and service or nonprofit groups. Challenge course providers who serve the corporate market do so as part of the management and professional development training industry.

### **THE HISTORY OF THE INDUSTRY**

The American Management Association launched interactive training seminars for managers and executives in 1948 partly recognizing the need for such in the economic boom that followed World War II.<sup>8</sup> Workshop sessions and classroom-based courses quickly followed and by the 1960's the industry was experiencing solid growth. The Center for Creative Leadership was founded in 1970 and provided not only training but also leadership and management research, and began to build a knowledge base of good leadership practice. As business grew increasingly more complex, the industry evolved in response to the changing leadership challenges. The need for leadership and management skills apart from specific knowledge about a particular company or a particular technical field was becoming clearer and clearer.

Separately, the challenge course industry was also experiencing growth and wider acceptance. The use of challenge courses to deliver leadership and management skills training to corporate clients can trace it roots back to Scotland in the 1930's. There a German educator named Kurt Hahn opened the Gordonstoun school and incorporated physical skills and outdoor adaptation and survival skills to the curriculum. During World War II, Hahn joined forces with Sir Lawrence Holt, a British shipping magnate, to utilizing such experiential based education to train British sailors and opened a training site in Aberdovey, Wales where, it is generally acknowledged, the first challenge course was built.<sup>9</sup> This early work led to the development of a 28 day residential course that offered individuals "confidence, redefined their own perceptions of their personal possibilities, demonstrated compassion, and developed a spirit of camaraderie with their peers"<sup>10</sup>. With the name "Outward Bound" – a nautical term for a ship leaving the safety of harbor for the uncertainty of the open sea – the idea grew and was eventually adopted "for corporate teambuilding, for inner-city youth and for special populations such as recovering alcoholics, families or adjudicated youth. Programs moved from being solely wilderness based, to also being offered in settings like classrooms and urban centers."<sup>11</sup>

Most of the Outward Bound schools being established during this time included challenge courses.<sup>12</sup> And beginning probably with the second Outward Bound school established in the United States, the Colorado Academy in Denver, a debriefing to facilitate a more expansive experience was first introduced.<sup>13</sup> As the number of courses grew, and as Outward Bound alumni and staff begin working in other educational venues, founding schools, and incorporating experiential education ideas and methods into a variety of educational programs serving very different training needs, but including corporate training, a number of challenge course professionals met in North Carolina in 1988. By 1991 they had determined to form a "national organization to support the development and standardization of challenge course practices."<sup>14</sup> In 1993, this became the ACCT.<sup>15</sup>

The 1980's were a high growth period for management training providers as rapid globalization and technological change had profound affects on American business and corporations. An appreciation for the value of management and leadership training continued to deepen and foster

demand. It was during this time, that challenge course and leadership training coincided, and challenge courses began showing up as critical components of management training.<sup>16</sup>

### **THE INDUSTRY IN 2006**

Over the five years beginning in 2002, revenues in the management and professional development training industry have risen to an estimated 5.6 billion in 2006 from 4.4 billion in 2002 (see Exhibit 3) after growing at about 8.4% a year between 1997 and 2002.<sup>17</sup> Driving this growth in demand was increasing globalization, the aging workforce, the pervasive spread of technology, and increasing acceptance and perceived value on the part of corporations.<sup>18</sup>

At the end of 2006 the industry employed nearly 94,000 people at over 61,000 establishments, and delivered training to some 2.1 million participants (see Exhibit 4).<sup>19</sup> It's estimated that 23% of these participants received training in management development which is generally regarded to include leadership, management, and/or supervisory skill training.<sup>20</sup> And, of course, a significantly smaller fraction of this training incorporated a challenge course component.

Management development and training is a highly fragmented industry although on a national and international basis it boasts some well known firms. These would include the American Management Association, Franklin Covey Co., The Center for Creative Leadership, and Learning Tree International Inc, but even these four companies taken together account for less than 10% market share.<sup>21</sup> Seventy-four percent of providers have less than five employees.<sup>22</sup>

Industry concentration is very low, the industry is highly fragmented, and competition, apart from the national forms, is very local and/or regional.<sup>23</sup> The industry provides short courses and seminars to corporate groups, executives, and individuals on a range of development topics. "This training may be provided through public courses or through employers' training programs, and courses may be customized or modified. Instruction may be provided at the establishment's or client's training facilities, educational institutions, the workplace or the home."<sup>24</sup>

On the whole though, these courses and seminars are not essential services so price, economic downturns, and corporate willingness to spend on training (in other words, the perceived value coupled with the absence of pressure to cut costs) can all affect demand. But the pace of change and employer perceptions of the value of training can increase demand particularly for highly respected and valued providers and programs.<sup>25</sup> Competition takes place over the quality of the training and the information provided. The trainer must be knowledgeable, expert, and respected. Reputation and industry specific knowledge matter a great deal. So, too, does price, flexibility, and effective marketing and advertising.<sup>26</sup>

Some competition comes from local colleges and universities as well as professional schools, particularly MBA programs. More and more, corporate universities are taking over large parts of the training needs of companies, and management consultants more and more offer general and customized training along with problem solving skills and abilities. There is little regulatory control over the industry as a whole, and no centralized authority to regulate practice and no single accrediting agency or organization. Providers operate with considerable autonomy and independence. Management training that incorporates a challenge course component is a small subset of the larger training industry but the competitive dynamics remain very similar.

Clients value this type of training – experiential training specifically that incorporates a challenge course component for a multitude of reasons.

- Cost effectiveness – it's possible to include large numbers of participants in a training event for a reasonable per participant course.
- Results – this type of training produces a lot of "Aha" moments. It makes abstract classroom concepts concrete, the lessons learned seem to show up back at the office, the lessons learned have staying power.
- Applicability – it's possible to use this type of training to cover a broad range of skills and concepts. Clients use challenge course training for such things as customer service training,

change management training, diversity training, assimilation of new groups after mergers or acquisitions, the openings of new operations, team building, conflict management and many others

As one human resource manager puts it, “as far as training goes, with experience, you have the best of all worlds, including a wellness component”<sup>27</sup>

### **COMPETING IN THIS INDUSTRY**

Since Mountain Challenge provides corporate management and professional development training in the areas of team building, change, teamwork, corporate values, planning, vision, innovation and creativity, they compete with other providers of these services. Some of these are local, that is, providers exist in the greater Knoxville area which includes Maryville. Some of these providers are national or even international as well. As noted above, this is a highly fragmented and localized industry so a number of different competitive situations exist. A local company can choose to send their employees to a national provider for example, and AMA seminar or to a Center for Creative Leadership seminar in another geographic location. It's not likely that training events of this kind will include a challenge course component. A locally based company may have operations in far-flung locales but may bring their employees here to Maryville for training in which case they might utilize Mountain Challenge.

So, Mountain Challenge may actually have potential local participants that are traveling to receive professional development training, and conversely may have participants traveling fairly great distances to receive Mountain Challenge training. In general, since Mountain Challenge competes for corporate training dollars, their fortunes moved with the economy. In belt-tightening or uncertain times, corporate expenditures on training are likely to drop – it is often the first place that companies looked to cut spending. Even though outdoor experiential training is quite differentiated from classroom it is still affected by trends of the whole economy.

### **COMPETITOR PROFILES**

#### American Management Association (AMA)

The American Management Association is a non-profit, member oriented organization that offers over 170 seminars in 20 different subject areas including leadership, communication, time management and finance. Open enrollment seminars are offered in short duration formats in major cities around the country and in different regions of the world through AMA Management Centers in Europe, Canada, Japan, and an affiliate institute in China. For corporate clients and members, the AMA offers on-site workshops, customized programs, assessment tools, licensing of in-house trainers, and seminars blended with interactive web-based learning modules.<sup>28</sup> Free web resources, including access to AMA research and an online library are also available. The AMA remains one of the largest and most well-respected management development training providers in the world, and as of 2003 was able to list over 3,000 organizations and 25,000 individuals as members.<sup>29</sup>

#### Development Dimensions International Inc. (DDI)

Development Dimensions International was founded in 1970 “to create and implement assessment centers that would provide behavioral data for hiring, promotion and employee and management development decisions for businesses. Their groundbreaking work on assessment center methodology evolved into many of the best practices still used today. In addition, [they] pioneered programs and services to hire and develop organizational talent. Today, DDI is an internationally-renowned human resource training and consulting company with offices around the world.”<sup>30</sup> DDI is primarily client centered, offering no open enrollment training, and focused on using their assessment expertise to assist companies in hiring and identifying talent, leadership development, and senior executive strategic and leadership development.<sup>31</sup>

#### Franklin Covey

Formed in 1997 from the merger of Franklin – a leading time management company – with Steven Covey's organization, Franklin Covey is focused on helping individuals become more effective. They offer programs for corporations, for government agencies, law enforcement groups,

schools, and sales groups. Covey, of course, is the author of the highly acclaimed and hugely popular, *Seven Habits of Highly Effective People*,<sup>32</sup> and the company offers seminars, events, and conferences, both open enrollment public course and customized on site programs.<sup>33</sup>

#### Center for Creative Leadership (CCL)

The Center for Creative Leadership, founded in 1970 and headquartered in Greensboro, North Carolina, is one of the leading leadership development companies in the world. They offer “an exclusive focus on leadership education and research and unparalleled expertise in solving the leadership challenges of individuals and organizations everywhere.”<sup>34</sup>

#### Impact Associates

Located in Maryville, Tennessee, Impact Associates has twice received a Business Excellence Award from the local Chamber of Commerce. They offer completely customized solutions to client needs in the areas of individual, team, and organizational development. Their repertoire includes training, consulting, research, assessment, and the organization and implementation of special events. According to their web site, they adopt a holistic approach to organizational change that includes assessment systems, personnel, and processes, customized design of solutions, and assistance with implementation of solutions, and the requisite follow up efforts.<sup>35</sup>

#### Horizons

Founded in 1994, Horizons is located in Knoxville, Tennessee, but also offers to travel to client locations, and advertises that they serve the business and industry community throughout the Southeast.<sup>36</sup> According to their web site, Horizons offers client specific team building, leadership development, and other organizational development training through experiential based programs that offer a learn by doing approach.<sup>37</sup> Featured programs include a leadership development workshop, a program for developing high performing teams, and a business simulation adventure. All can, and usually, do incorporate a challenge course in the program. The business simulation will also incorporate rock climbing, caving, and orienteering. Both the leadership development and the high performing teams programs feature additional surveys intended to assess personality type or inventory various skills. Horizons also will customize programs to suit client needs.<sup>38</sup>

### **INSIDE MOUNTAIN CHALLENGE**

#### ***Customer and client relationships***

Mountain Challenge designs their services for corporate development around outcomes, results, and progress. They focus on change, teamwork, corporate values, planning, vision, innovation and creativity. They offer ropes course, the alpine tower, backpacking and hiking, rock climbing, caving, whitewater rafting and canoeing, as well as customization, and also design on-site programs. Mountain Challenge serves local Knoxville area corporations businesses and non-profit agencies and schools. They have at times traveled to customer sites to deliver programs, and they also deliver programs for locally based corporations with operations across the country and the world. They are included as a routine part of the curriculum in at least one local corporation's corporate university. Each Mountain Challenge course is essentially customized – that is, it begins with an understanding of what each customer is looking to accomplish and then program elements are designed to accomplish those objectives. Clients provide facilitation direction or customizing direction.<sup>39</sup>

Longstanding customers and groups (annual users) include Clayton, Pilot, Ruby Tuesday, Leadership Blount, One Community, Boy Scouts, Upward Bound, and the Summer Youth Getaway program. Some clients have such long standing relationships with Mountain Challenge that developing the program and quoting a price are very standardized for that customer. One customer, who has their own challenge course, provides an annual retainer for Mountain Challenge staff to deliver programming on their own course, and then pays an agreed upon participant fee.

Marketing is accomplished through word of mouth. At the completion of each course or program, participants are asked to complete an evaluation, and then to provide any referrals – any individuals or companies they feel might be interested in a Mountain Challenge course. Mary Steger, the director of marketing, then follows up with each referral. If there is difficulty reaching someone or if the interest level doesn't appear to be imminent, then Mary will mail them a follow-up brochure.

Additionally there are several community groups who utilize Mountain Challenge programming and Mary follows up with the list of possible clients provided by participants.

There have been times in the past when Mountain Challenge has done a mailing campaign, but the response rate is only about 10 inquiries from 300 mailings. Mountain Challenge is considering ways of partnering with the Chamber and they also will occasionally offer free courses.

Mountain Challenge offers their customers consider flexibility and customers report deep appreciation for that.<sup>40</sup> They require no deposits or contracts because circumstances are always subject to change, and the weather is always a factor. Cancellations on the part of customers are accepted and worked through, and usually customers may only be charged for lunch if those expenses have been incurred. Pricing is therefore considerably flexible, but pricing authority resides with only Bruce or Mary, and ultimately price is just another variable in the conversation with each customer to deliver the program they are looking for.

The business is seasonal with August and September being the busiest months, so in winter Mary spends most of her time on the phone. The web site does produce some inquiries. Marketing is a process that is much of a constant discussion with Bruce about inquiries, customers, events, ideas for programs, and outcomes.

### **Operations**

Since ropes course are perceived as generic, what sets Mountain Challenge apart is the quality of the facilitation. Mountain Challenge has such a broad base of experience and insight and they work so closely with customers in terms of developing the program, understanding the outcomes, and in many cases adopting the language and vocabulary of their customers – the lingo – to some extent absorbing the culture that their facilitation is of extraordinarily high quality. In turn, this makes staffing training and culture of vital importance.

Mountain Challenge has only two full time employees; Bruce Guillaume and Mary Steger, and two part time employees where part time is more substantial than the part time staff used for course or programs, one of whom is Tyson Murphy, a lead staff person. There is pool of about 45-50 additional staff to draw from, and this staff varies widely in the amount of time they work. Some staffers might do two events a year while others might do fifty. All staff members receive workers compensation insurance and liability insurance as benefits. The primary human resource challenge is getting the appropriate staff for any particular course

Staffing is done course by course. Contracts are executed between Mountain Challenge and each staffer for each course. Mary Steger spends more time on the human resource side of the business; on staffing rather than on marketing. Mountain Challenge takes staff training and development very seriously. There are four staff levels each level denoting a higher degree of skill, technical competence and experience. Tyson Murphy is a program manager and supervisor of the student staff, and the lead staff person. As lead staff he coordinates the whole event making sure equipment is ready, and keeping an eye on the weather.

The approach to “operations” is very process oriented. The Mountain Challenge staff knows they are dealing with perhaps the two most unpredictable systems possible – people and weather. Because of this, they value good judgment. They are continually looking to develop the quality of judgment that marries training, experience, and process in order to produce really good decisions about people and weather; essentially, really good decisions about the unpredictable. They are always making decisions with incomplete information, and so their approach is not to learn how to predict the unpredictable but to develop that quality of judgment that produces good sound safe decisions when the unpredictable happens.. And when circumstances turn out differently that hoped or planned for or when the actual outcome produces concern, they debrief their failure. They don't debrief in order to assign blame but to make the next time easier and to make themselves better. There is openness to new ideas. Nothing is ever ruled out and they are always learning from mistakes.

## **PERFORMANCE**

Clients are routinely asked to evaluate each program (a composite of customer evaluations for the past several years is shown in Exhibit 5). For their part, customers have little but positive things to say about their experiences with Mountain Challenge. Local customers that include Mountain Challenge in their training repertoire also use and have used such outside sources for training as DDI or the Center for Creative Leadership. Clients typically view Mountain Challenge as set apart from these others. The type of training they deliver is very different because of the experiential element. Clients who value this kind of experiential training particularly value Mountain Challenge because of:

- Their passion for their work
- Their commitment to excellence
- Their commitment to partnering. Mountain Challenge has an ability to customize and is adept at customizing, but they also make the effort to understand what the customer wants to achieve. They learn the language, the ideas, and some of the company culture so they can speak to each group to each participant in their own language.
- Their sincerity and their realism
- Their dedication to receiving feedback. They seek it out and they act on it.

Clients have a high degree of confidence and comfort – clients know that every event will be a success, that it will accomplish their objectives. Moreover, many clients report that this high level of comfort existed after their very first experience with Mountain Challenge.

In order to assess and measure their performance, Mountain Challenge annually tracks several trends. But in keeping with their first principles of safety and quality they have developed standards around these two. Safety (see Exhibit 6) is defined in terms of incidents. Mountain Challenge expects 99.85% of their course to be incident free, and they define an incident as opening the first aid kit. So, even a band-aid is a reportable incident. For quality, customers are asked to evaluate different aspects of the course. The stated goal is “a 4.75 plus overall satisfaction rating immediately following a course, 4.5 plus six weeks following a course, and a 4.25 plus ninety days following a course.”<sup>41</sup> Key performance measures reported on each year include participant counts which is the number of participants in each course, program, or event times the number of events each year.

## **LEADERSHIP AND CULTURE**

Tyson characterizes Bruce’s leadership style as not micro-managing. Bruce gives people more respect than they deserve and extends them trust from the very beginning continues that trust until they show him otherwise. The Mountain Challenge staff responds well to the amount of respect shown them and the amount of responsibility delegated to them. It sets in motion a desire to really do well and a desire to live up to expectations.

At Mountain Challenge there is no split between work and play. Your whole person is valued. In a similar way, the company’s values are clear and lived out. Work is fun because it is done together, with other hard workers, but with hard “players” too.

## **CERTIFICATION AND THE MC COVENANT**

Throughout most of 2006 and into 2007 Bruce gathered, on several different occasions, a number of current staff, former staff, and informal advisers, to think about these questions of the commoditization of the experience, about the proliferation of ropes course and the efforts to industrialize challenge course experiences – to certify competence in this craft.

He had already reached a decision that the answer was not certification; that his expectations, and Mountain Challenge’s expectations of staff and competency went beyond anything that could be certified. He wanted “judgment;” that quality in staff that brings together technical competence and knowledge, behavioral insight, and experience with outdoor related variables such as weather, along with a well-understood set of objectives from each client, and a well thought out approach to each program, and a process that prepared everyone to be comfortable with the unpredictable.

While Mountain Challenge did in fact identify different staff levels of experience and competence, and could easily distinguish between differing levels of competence, there was no way that the quality

of judgment could be certified. Bruce had already decided that in fact, the existing relationship between Mountain Challenge and its people was a de facto covenant. The groups he brought together during that year helped Mountain Challenge to articulate the understanding of the covenant. The following is taken from the Introduction:

*“Twenty years ago, we were truly a unique company. Today, a lot of companies provide outdoor adventure experiences as part of an ‘industry’ that seeks to certify and regulate. We seek something larger. We call our approach 180° from the norm. Since we are truly interested in quality throughout our lives we must demand more than mediocrity. What are quality experiences for our participants? What is quality in our company? How can our courses be as safe as possible? How can we maintain a high quality, fun, principled workplace? Rules, regulations, policies, procedures, and certifications are not the answer. They are only indicators of minimum expectations. They may serve protective functions but do little to support excellence. They define the floor but not the ceiling. They guarantee mediocrity. Difficult things are not accomplished by rules. We need a structure that supports all that we have to give and provides the same serious and flexibility as marriage vows. We need to establish a covenant among ourselves resting on people’s good will and commitment to a shared vision and a rich and compassionate life.”<sup>42</sup>*

The covenant established four primary obligations beyond a fundamental understanding and living out of the Mountain Challenge mission. The first of those obligations was a responsibility of staff to continually challenge themselves, to seek mastery, to seek genuine fun, and to continually align form and function in their lives. The second obligation was a total responsibility to the life-changing nature and possibilities that their outdoor experiences provide to their participants. The third obligation was a responsibility to the local community particularly in regard to fitness and wellness. The final obligation encompassed their responsibility to the environment starting with their own facility, and extending to the larger community.

The establishment of the covenant would take its place along side the establishment of the mission, and the establishment of the first principles and supporting principles as crucial developments in the Mountain Challenge culture. Further, the covenant, and all that had preceded it, formed the bedrock of the Mountain Challenge ethos that Bruce was insistent be handed on. As with much that came before it, the covenant was an articulation of the way Mountain Challenge did things. It was not new. It was not new policy, or new ways of behaving. It was a process of soul searching in response to some questions about what the next 20 years would be like. One thing was certain – Mountain Challenge in the next 20 years would forge ahead with the intention that its soul remain unchanged.

## REFLECTION

There is nothing apparent about Mountain Challenge – nothing in its literature, nothing on its website, nothing in (or on the walls of) Crawford House, nothing in any of its business practices, policies, or procedures, – to suggest that Bruce is a Quaker, or that the company is, in any way, shaped by his identity as a Quaker. Perhaps that is as it should be. For Quakers, or Friends, eschew outward signs and trappings and embrace plainness of appearance and outward deference; a deflecting of attention from anything personally aggrandizing. They favor inward or inner authenticity, faithfulness, individual responsibility, humility, and openness.

Yet, on closer examination, there is no separation between Bruce’s identity as a Quaker and his identity as the founder of Mountain Challenge. There is no divide between the person and the company, no divide between work and personal life. Mountain Challenge manifests several aspects of Quaker spirituality and embraces and manifests Quaker values in many ways. Before we explore those ways, let’s examine Quaker spirituality and values. From its roots in England in the late 1600’s until now, Quakers, or Friends, have been influential beyond their relatively small numbers. The Society of Friends are perhaps well, and commonly known, to be concerned for social justice, opposed to slavery, and embracing of pacifism and nonviolence. But these are not formal doctrine. Rather, all of these are rooted in a Quaker understanding of reality, indeed, an understanding viewed

by them as a “third way” – separate and different from other Christian denominations, either Catholic or Protestant.

The Quaker understanding of reality is infused throughout Quaker spirituality. This is a spirituality at whose core is a direct experience, or apprehension, of the divine – what is sometimes referred to as the Inward Light. This direct experience is open to all, without intermediary or authority, without sacrament or scripture, without creed or confession, without doctrine or dogma. But, the possibility of such experience demands that we take responsibility for opening ourselves to that experience, and to remaining open; to living in a manner that keeps us open to it. Collective Quaker experience and wisdom about what this means and how to do this is known as a testimony of simplicity. For living in a way that is continually open to direct apprehension of the divine is to first and foremost live simply, to live without cumber.<sup>43</sup> Cumber is any aspect of worldly life, but particularly material possessions, that could act as an impediment to the discernment of God’s presence and will. Plain living “helps us seek outward detachment from the things of the world in order to focus our lives on the leadings of Spirit.”<sup>44</sup>

Coupled with their understanding of man as a created being with the inherent dignity and equality that flows from that status (a creature in the image of the Creator), rests the Quaker resistance to distinctions of class, power, and inequality. No one of us is above another and therefore no one of us should be concerned with “besting” another in any material way. Rather, we must honor the experience of others, and take responsibility for our own experience. For the direct experience of the divine does not leave us untouched. It is a form of knowledge, of discernment, of discovery of the will of God, His direction, and his hand in our lives. And so, we have a responsibility to act in faith and in conformity to this knowledge. And again, collective wisdom and shared experience give to Quaker testimonies, on peace, equality, justice and integrity.

So, as noted there is nothing apparent about Mountain Challenge that reveals Bruce’s identity as a Quaker, but on closer examination, its clear that elements of Quaker spirituality flow through Mountain Challenge, its business practices, and its decisions. Indeed the very establishment of a covenant and the resistance to industry certification efforts is a very Quaker approach. There are two issues here, the first of which concerns proper authority to decide what constitutes levels and criteria for certification, the second, is the removal of individual responsibility for professional competency. Beyond this, the other aspects of Mountain Challenge that are reflective of , and animated by, Quaker spirituality include the trust placed in employees, the trust placed in the value of the experience, the emphasis on individual responsibility, the absence of any hierarchy or authoritative management structure or attitude, the emphasis on commitment and the respect for the processes of discernment. The manner in which prospective employees are invited to “shadow” or participate directly, to “meet” Mountain Challenge as it were is also clearly infused with Quaker values. Mountain Challenge is a place where people find themselves by being open to direct experience and taking responsibility both for that openness and for living from that center.

But there is another deeper dimension here – Mountain Challenge itself. There is a sense in which the business premise or the business model or the company itself fully mirrors Quaker values and spirituality. Consider the Mountain Challenge mission:

"We provide high quality, safe outdoor experiences designed to change the world for the better, one person at a time."<sup>45</sup>

What the company offers to participants is accomplished through direct experience. Participants must then take responsibility for their own openness and engagement with that experience, and for discerning the value and relevance of that experience in their lives, and then take responsibility for living out that value and relevance in the world. These are experiences designed for participants to “meet” themselves, and others, to learn, to discern, and to take responsibility then for what the experience has taught them, and to then, reflecting Quaker wisdom, “change the world for the better”.

## EXHIBITS

Exhibit 1: Annual Growth<sup>46</sup>

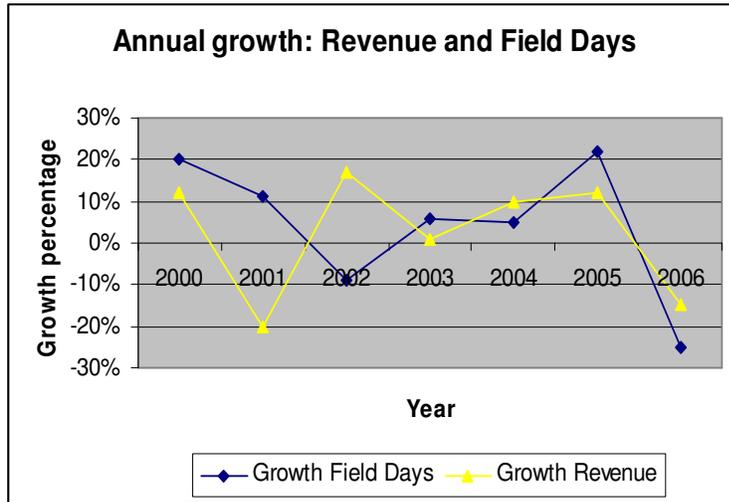


Exhibit 2: Number of Participants<sup>47</sup>

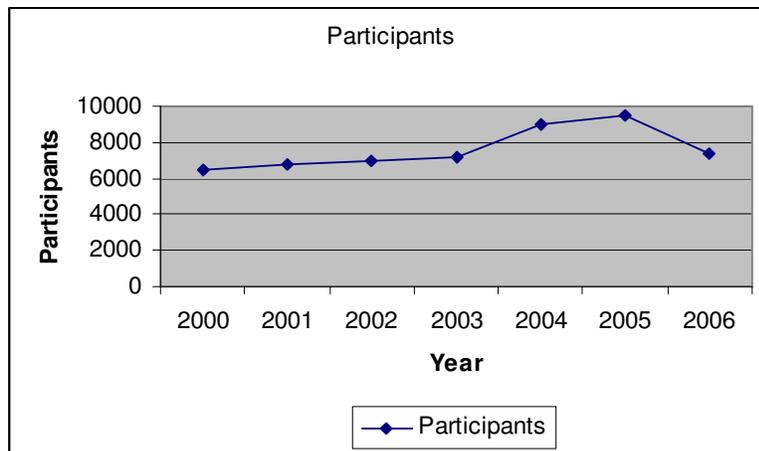


Exhibit 3: Industry Revenue by Year<sup>48</sup>

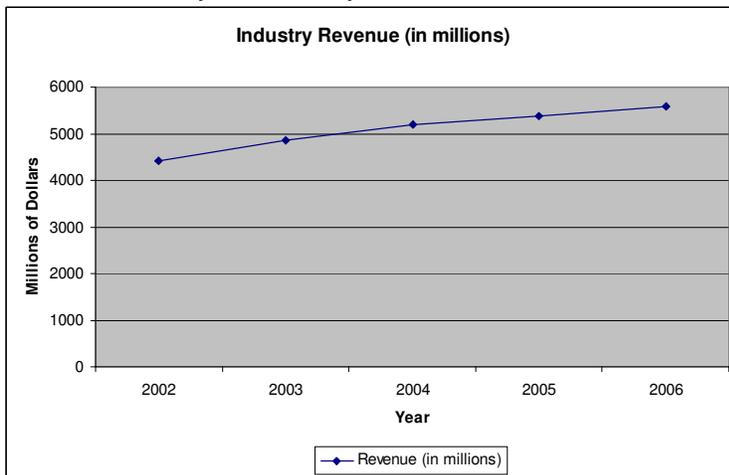


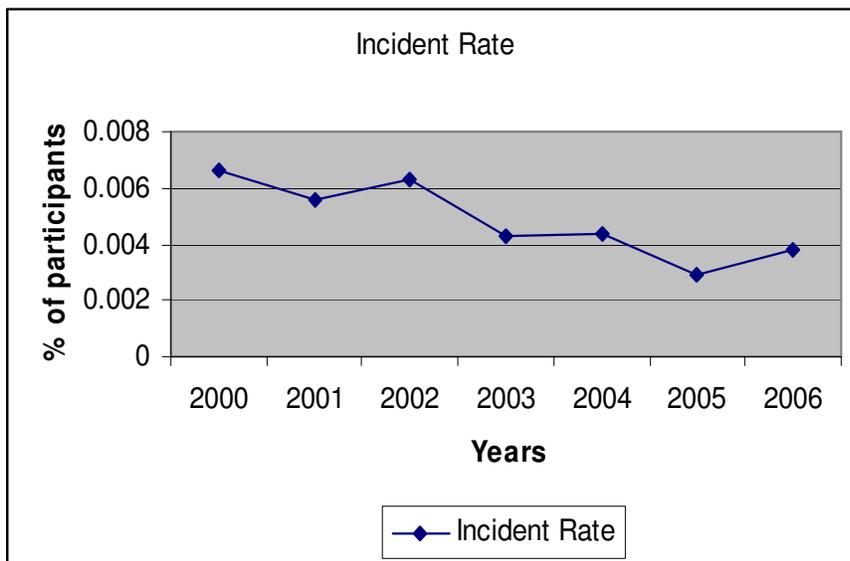
Exhibit 4: Employment, Establishments, and Participants<sup>49</sup>

	2002	2003	2004	2005	2006
Employees	78874	85513	90514	91305	93687
Establishments	51154	54178	57034	59260	61153
Participants (in millions)	1766.0	1891.0	2027.0	2109.0	2180.0

Exhibit 5: Customer Ratings<sup>50</sup>



Exhibit 6: Incident Rate<sup>51</sup>



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## ENDNOTES

- <sup>1</sup> <http://www.acctinfo.org/displaycommon.cfm?SessionId=AB42EB5B-6172-4291-96C8A537E91355AA&an=8>
- <sup>2</sup> <http://www.acctinfo.org/>
- <sup>3</sup> <http://acct.affiniscap.com/associations/5266/files/HistoryOfCCourses%2Epdf>
- <sup>4</sup> <http://www.mtnchallenge.com/who-mission.asp>
- <sup>5</sup> <http://www.mtnchallenge.com/who-mission.asp>
- <sup>6</sup> <http://www.mtnchallenge.com/who-mission.asp>
- <sup>7</sup> <http://www.mtnchallenge.com/who-mission.asp>
- <sup>8</sup> IBISWorld Industry Report September 07 2007
- <sup>9</sup> <http://acct.affiniscap.com/associations/5266/files/HistoryOfCCourses%2Epdf>
- <sup>10</sup> <http://www.outwardbound.net/about/history.html>
- <sup>11</sup> <http://www.outwardbound.net/about/history.html>
- <sup>12</sup> <http://acct.affiniscap.com/associations/5266/files/HistoryOfCCourses%2Epdf>
- <sup>13</sup> <http://acct.affiniscap.com/associations/5266/files/HistoryOfCCourses%2Epdf>
- <sup>14</sup> <http://acct.affiniscap.com/associations/5266/files/HistoryOfCCourses%2Epdf>
- <sup>15</sup> <http://www.acctinfo.org/displaycommon.cfm?an=1&subarticlenbr=66>
- <sup>16</sup> <http://www.acctinfo.org/>
- <sup>17</sup> IBISWorld Industry Report September 07 2007
- <sup>18</sup> IBISWorld Industry Report September 07 2007
- <sup>19</sup> IBISWorld Industry Report September 07 2007
- <sup>20</sup> IBISWorld Industry Report September 07 2007
- <sup>21</sup> IBISWorld Industry Report September 07 2007
- <sup>22</sup> IBISWorld Industry Report September 07 2007
- <sup>23</sup> IBISWorld Industry Report September 07 2007
- <sup>24</sup> IBISWorld Industry Report September 07 2007
- <sup>25</sup> IBISWorld Industry Report September 07 2007
- <sup>26</sup> IBISWorld Industry Report September 07 2007
- <sup>27</sup> Interview with Jaymi Damron, Pilot Corp, December 27, 2007
- <sup>28</sup> <http://www.amanet.org>
- <sup>29</sup> [http://www.amanet.org/aboutama/pdfs/ama\\_history.pdf](http://www.amanet.org/aboutama/pdfs/ama_history.pdf)
- <sup>30</sup> <http://www.ddiworld.com/about/founders.asp>
- <sup>31</sup> [http://www.ddiworld.com/our\\_expertise/default.asp](http://www.ddiworld.com/our_expertise/default.asp)
- <sup>32</sup> Steven Covey, *The Seven Habits of Highly Effective People* ().
- <sup>33</sup> Franklin Covey website GET URL
- <sup>34</sup> CCL web site GET URL
- <sup>35</sup> <http://www.impactassociates.org/what/index.html>
- <sup>36</sup> <http://www.experiencehorizons.com/index.html>
- <sup>37</sup> <http://www.experiencehorizons.com/about.html>
- <sup>38</sup> <http://www.experiencehorizons.com/p&s.html>
- <sup>39</sup> Interview with Tyson Murphy, December 2007
- <sup>40</sup> Interview with Donna Burns, JewelryTV, December 27, 2007
- <sup>41</sup> 20 Years of Mountain Challenge
- <sup>42</sup> The Mountain Challenge Covenant
- <sup>43</sup> John Woolman. (1720–1772). The Journal of John Woolman. The Harvard Classics. 1909–14. In Chapter II of his Journal, Woolman remarks, “ Having now been several years with my employer, and he doing less in merchandise than heretofore, I was thoughtful about some other way of business, perceiving merchandise to be attended with much **cumber** in the way of trading in these parts. (emphasis added).
- <sup>44</sup> Catherine Whitmire. *Plain Living: A Quaker Path to Simplicity*. Sorin Books. 2001
- <sup>45</sup> <http://www.mtnchallenge.com/who-mission.asp>
- <sup>46</sup> IBISWorld Industry Report September 07 2007
- <sup>47</sup> IBISWorld Industry Report September 07 2007
- <sup>48</sup> IBISWorld Industry Report September 07 2007
- <sup>49</sup> IBISWorld Industry Report September 07 2007
- <sup>50</sup> Mountain Challenge Annual Reports
- <sup>51</sup> Mountain Challenge Annual Reports