



## CHALLENGE LEARNING PROGRAM ROLES & RESPONSIBILITIES DESCRIPTIONS

By Paul Cummings

Note: The roles listed below are often fulfilled by a very small team. If you are managing a program you may, in fact, need to play all or nearly all of these roles. Still, it can be helpful to know which hat you are wearing at different points in your sales or customer service cycle.

**BOARD OF DIRECTORS** - Provides coaching and direction, long term vision, and is typically comprised of individuals with complementary skills. The BOD is a sounding board for the leaders of the organization and offers advice on major decisions.

**PRESIDENT & CEO** - Is responsible for providing leadership and is ultimately accountable for the company's successes and failures. This person must balance strategic and tactical thinking and must mentor others in the organization. More than any other person, the President and/or CEO must set the direction for the culture and provide appropriate support and resources. The President and CEO is the primary risk taker as all successes and failures are in part due to choices made at this level.

**MARKETING & SALES STRATEGISTS** - This is the creative and strategic side of the marketing process. This person is often a consultant or an advisor, as is provided by The Challenge and Adventure Advisory. This person or team develops plans and processes and then provides advice and perspective that can be implemented by others in the organization.

**MARKETING COORDINATOR (Administrative)** – This role is responsible for implementing marketing plans. These tasks are often administrative in nature and therefore do not require the same set of skills as is required of the marketing strategist.

**GENERAL ADMINISTRATION** - This person or group of people is responsible for the management of the time consuming tasks involved in office and program administration. Jobs such as faxing, answering phones, writing follow up documents, copying, and coordinating logistics are included in this person's responsibilities. Wherever possible, people with strategic roles must allow administrative team members to handle such details. Administrative persons often require training and coaching to develop the type of skills needed within an organization. Strategists and others must provide adequate support and direction to these valuable team members if they are to contribute to their full potential.

**OFFICE MANAGER** - This leadership position is responsible for the development of systems, training, administrative procedures, and the evaluation of the general administration team. This position requires a sophisticated blend of tactical and strategic thinking, and a high degree of collaboration with the rest of the organization.



**CURRICULUM DEVELOPMENT & CUSTOMER SERVICE TEAM** - This group works together to develop standards and create curriculum. While one person could take on this role, the ideal situation takes into account the perspective of broader group of team members. Often the product/curriculum development team includes customers and outside consultants with facilitation expertise.

**ALLIANCE RELATIONS** - Someone must maintain an ongoing and ever improving relationship with strategic partners. This requires staying in touch with your alliances. The Alliance Relations role must fall to an individual who is capable of showcasing the skills and competencies of your team. Such skills as trouble shooting, sales challenges and socializing with these individuals fall within the scope of this role.

**ACCOUNTING / BOOK-KEEPING (Outsourced)** - This position is responsible for maintaining the books, running regular reports on the financials, offering suggestions for how to better manage or utilize resources, and paying bills on time.

**ACCOUNT MANAGER** - This is the person is responsible for developing the relationship between your organization and the customer. The AM typically works directly with the client to develop a proposal (verbal or written) and is usually involved in developing the contract and price for the program. This person may also work as the program manager or as a facilitator during the program. They are responsible for writing a summary report (where applicable) and the AM manages follow-up during long-term projects or at the completion of the contract for shorter projects.

**PROGRAM MANAGER** - This is the client's primary contact. This person may be the Account Manager but may also have taken over after the contract is signed. The Program Manager is responsible for managing the facilitator team in a way that allows the client to achieve his or her stated goals for the program.

**TRAINER** - Trainers manage, oversee, and deliver content and skill building sessions. Trainers have expertise in presenting learning models, instruments, and other educational content. A trainer is differentiated from a facilitator because he/she is directly responsible for making sure that the skill building content of the program is delivered in a way that will achieve the client's stated goals for the program.

**LEAD FACILITATOR** - Lead facilitators sequence activities, manage the clients experience, brief initiatives, debrief initiatives, can manage safety on both the high and low ropes elements, and guide group discussions so that the clients' stated goals are achieved by the end of the program. Lead facilitators are capable of training new staff and are qualified to facilitate and perform evaluations for other facilitators.



**FACILITATOR TIER I** - Tier I facilitators have had limited experience (fewer than 5 programs) with your program. These facilitators may be qualified to Program Manage but have not had enough exposure to your programs to know that for sure. Tier I facilitators shadow other facilitators or more likely take a group of their own but with limited responsibility for sequencing and “on the fly” training decisions. All new facilitators join the team as Tier I facilitators and receive a formal evaluation at the completion of their first or second program.

**FACILITATOR TIER II** - Tier II facilitators are qualified to lead a group and may be able to manage safety on the high and low ropes elements. Tier II facilitators have fewer than 100 days of facilitation experience.

**TECHNICAL AND SAFETY SPECIALIST (TSS)** - These critical team members oversee and set up safety systems. They are capable of any level of rescue. TSS have been trained in emergency protocol for on and off site programs. Techs and safety specialists have current first aid and CPR and may have First Responder or EMT training. In the event of an emergency the TSS works directly with the PM or LF to manage the site and implement the Emergency Action Plan.

**SITE LOGISTICIAN** - Site Logisticians set up and take down initiatives, training materials and other equipment or resources. Often these individuals are training to become a Tier I facilitator or they are playing a dual role as the TSS. Site Logisticians may also manage the comfort of customers and facilitators or trainers. These responsibilities may include drink or food delivery, making copies, preparing workbooks, and other vital details.

**GROUNDSKEEPER** - This position is responsible for maintaining an aesthetically pleasing site that is safe and easy to use.

**STAFFING COORDINATOR** - Manages every aspect of staffing programs and making sure that the right skills sets are represented with the respect to the client’s goals and objectives, the program content, and the location.

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