



**ETDA Membership Fit Assessment
v. 2014**

ETDA Who We Are:

The ETDA Alliance is a dynamic learning community of owners, principals, and senior staff of Experiential Training and Development consulting firms. The Alliance is a trade association comprised of member firms including privately held businesses, non-profit organizations and university programs.

Why We Exist:

We inspire our members to provide premier experiential training and development services. We do this through:

- Raising the professionalism, ethics, quality and impact of each members' businesses
- Strengthening our members' businesses
- Engaging each other and thought leaders from related fields and disciplines to inspire and provoke our thoughts and actions

ETDA members commit to applying the principles of the Alliances' three service areas to deepen their relationships, enhance performance and apply tools of consultation to grow as individuals, as practitioners and as providers. This environment stimulates a creative tension that is conducive to a dynamic learning community. Member firm representatives are expected to be able to participate in a wide range of in-depth conversations, and bring a high level of practice and experience to conversations. Our intent is to create a network of peers who can hold a high level of conversation about the current and future direction of experiential training and development with corporate clients (for profit, not-for-profit and governmental agencies).

ETDA is committed to the concept that its members are a good fit for each other and the organization, which requires member firms to be aligned with ETDA's purpose. Once a potential member expresses interest and completes the following self-administered survey, they are then evaluated by their peers on their ability to meet defined criteria for service, professionalism, and ethics as outlined in the DeEP document, attached to the end of this document

Please fill out the following:

Name of the firm applying:

Website address:

Address:

Phone:

Name of the Representative/s to liaise with ETDA (a person/s in a role of authority within organization: owner, partner, Director, primary decision maker). A maximum of three representatives.

1- Primary Contact Person:

Phone / email / Other:

2 - Representative:

Phone / email / Other:

3 - Representative:

Phone / email / Other:

Please have one of the above representatives rate your organization on each of the criteria below, using a 1-5 scale, where 5 is the best possible fit.

1. Commitment, motivation, and interest in experiential training and development with corporate clients.	1	2	3	4	5
Please provide comments to support your rating:					

2. Proven experience, skills, and competency with corporate clients in two or more experiential training and development practice areas (Relationship Development, Performance Enhancement, Organizational Consulting).	1	2	3	4	5
Please provide comments to support your rating:					

3. Is a viable business, which is defined as a primary occupation for at least one individual, is properly insured and registered, and provides services directly to clients.	1	2	3	4	5
Please provide comments to support your rating:					

4. Looking for and open to personal and professional development in a thought provoking, challenging environment.	1	2	3	4	5
Please provide comments to support your rating:					

5. Marketing or and/or other descriptive material accurately reflects the skills and abilities of the service or practitioner.	1	2	3	4	5
Please provide comments to support your rating:					

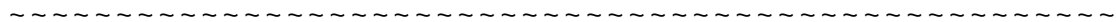
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6. An understanding of, and, agreement to adhere to the Alliance's DeEP document and guiding principles.	1	2	3	4	5
Please provide comments to support your rating:					

7. Willingness to collaborate and share versus compete and isolate.	1	2	3	4	5
Please provide comments to support your rating:					

8. Willingness to actively participate as a volunteer within ETDA.	1	2	3	4	5
Please provide comments to support your rating:					

9. Commitment to play a personal role in helping to shape the future of the Experiential Training and Development field.	1	2	3	4	5
Please provide comments to support your rating:					



If you rated mostly 4's and 5's on the above questions, you are likely to find great value in ETDA membership. After completing this assessment, if you think your organization would be a good fit for ETDA membership, we invite you to submit this form to: info@etdalliance.com.

The DeEP Dialogue

Definition and Ethical Practices

Version 10
Revised December 12, 2011

Introduction & Purpose

The **DeEP Dialogue** is intended as a tool to provoke reflection and generate conversation among experiential training and development practitioners and providers. As members of the Experiential Training and Development Alliance, we strive to continually refine the definition of our work, so that we may be clear with our clients and each other and accurately represent our work. The DeEP dialogue helps us to see our actions in the light of our intentions. We improve and evolve through rigorous self-examination, dialogue and peer feedback. Through ongoing **DeEP** dialogue, the ETDA aspires to the highest professionalism possible. We invite you to join us on this journey.

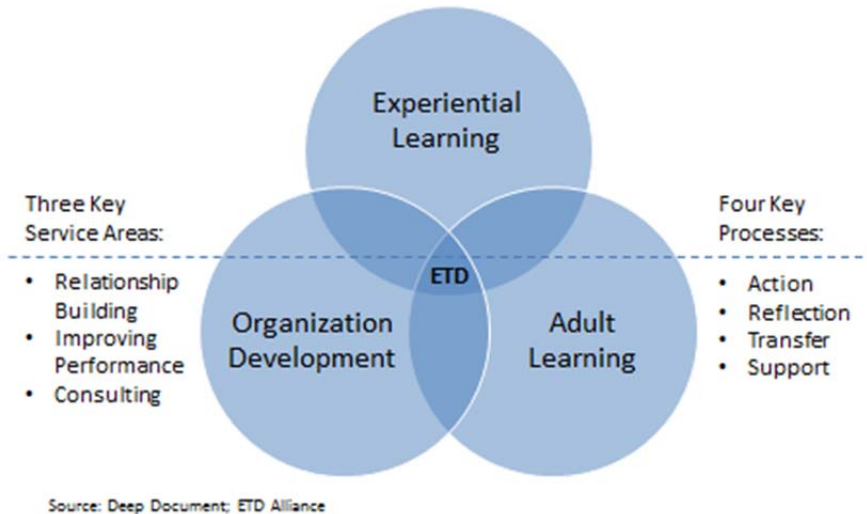
Definition of Experiential Training and Development (ETD)

Experiential Training and Development (ETD) is an approach to individual, group and organization learning and transformation that:

- utilizes a methodology of action, reflection, and transfer of learning;
- synthesizes approaches from a variety of professional practices (see ETD framework below);
- requires the integration of activity, content, sequencing and environment with mindful attention to emotional, professional and physical safety;
- provokes a shift in thoughts, feelings, attitudes and mindsets, which leads to changes in behavior;
- accelerates tangible results, including performance, leadership, accountability, communication, relationship depth, self-awareness, partnerships, and organizational change.

This definition is grounded in the belief that when individuals change, groups, systems and organizations change. The capacity to learn and develop is greatest when the whole person is engaged – the head, the heart, the spirit, and the body.

Experiential Training and Development Framework



The ETD framework combines the fields of experiential and adult learning with organization development. The approach applies natural processes of learning to the areas of people, relationships and organization improvement.

The ETD Framework is based on many sources and the work of many individuals. The main sources are listed below. Other sources can be found by consulting bibliographies and resources in the areas listed.

Experiential Learning

Experiential learning combines direct action and experience with guided reflection, analysis, and decision-making about real situations before transferring and applying the learning to new experiences. In 1975, David Kolb and Ron Fry developed their model of the Experiential Learning Cycle, which is the most prevalent model illustrating the experiential learning process. The model draws on the work of prominent scholars – John Dewey, Kurt Lewin, Jean Piaget, William James, Carl Jung, Paulo Friere, Carl Rogers – who gave experience a central role in their theories of human learning and development. A four stage cyclical theory of learning, Kolb's experiential learning theory is a holistic perspective that combines experience, perception, cognition and behavior.

Source: David A. Kolb

<http://www.learning-theories.com/experiential-learning-kolb.html>

Organization Development

Organization Development is an effort that is (1) planned, (2) organization-wide, and (3) managed from the top, intended to (4) increase organization effectiveness and health through (5) planned interventions in the organizations “processes,” using behavioral-science knowledge.

Source: OD Network Website from, Richard Beckhard’s 1969 Organization Development: Strategies and Models

<http://odnetwork.org/aboutod/index.php>

Adult Learning Theory

Adult Learning Theory is a set of ideas about how adults learn new skills or information. The theories focus on five principles that are key to effective learning: Adult learners need (1) to be respected, (2) to see the immediate usefulness of the learning, (3) a safe learning environment, (4) to be engaged in their learning, and (5) learning to be relevant to their lives.

Source: Malcolm Knowles

http://www.azdhs.gov/azwic/documents/local_agencies/trainingmanual_pdf/module_18.pdf

ETDA Ethical Practices

I act in ways that promote goodwill and positive perceptions of ETDA and its members. As an ETD provider and/or practitioner, I am committed to supporting and acting in accordance with the following ethical practices:

A. Responsibility to Self

1. I act with personal and organizational integrity.
2. I am a life long learner.
3. I recognize and attend to my own needs and acknowledge their link to my effectiveness.
4. I clarify my own economic and financial interests/needs.

B. Responsibility for Professional Conduct

1. I define, seek to understand, and pursue a set of core values aligned with my professional practice.
2. I continually assess and upgrade my skills and knowledge (through books, travel, courses, conferences, staff retreats, mentoring, etc).
3. I accept responsibility for the consequences of my actions.
4. I establish collegial and cooperative relations with other practitioners/providers.
5. I innovate and try new things while mindful of my cultural and professional competence.
6. I honor commitments and agreements.
7. I gain permission and give credit for the use of other’s original materials.

C. Responsibility to Clients

1. I work to identify and serve the long-term interests of clients, even when the work being done has a short-term focus.
2. I acknowledge and manage the occasions that the organization's objectives may conflict with the needs/desires of individuals within the organization.
3. I make reasonable efforts to assure that my services are properly understood and used.
4. I conduct all professional activities, programs, and relationships in ways that are open and authentic.
5. I make agreements covering my company's services, for example, expectations, intellectual property, remuneration, and insurance.
6. I bill fees and expenses honestly.
7. I identify and seek to resolve conflicts constructively. For example, I identify and address potential conflicts of interest when working with competing clients.
8. I protect the confidentiality of client-professional relationships and information.
9. I recognize that my actions will impact the professional path as well as the emotional and physical state of individuals. I acknowledge and accept my role and responsibility.
10. I seek informed consent for any professional, physical and/or emotional risk.
11. Given my position of leadership, I am aware of my power and authority and use it responsibly.

D. Responsibility to Colleagues (Employees, Contractors and Other Providers)

1. I define contractual relationships with all whom I hire in advance of service delivery.
2. I am responsible for clearly communicating the nature of the terms of our consulting/employment agreement.
3. My agreements clearly define roles and responsibilities, expectations, intellectual property, remuneration and insurance coverage.
4. I define and communicate to those I hire my expectations of how they represent their employment to my client. Contractors and providers agree on terms for any future work opportunities with that client.
5. I am straightforward with others about non-compete agreements and intellectual property.
6. I raise contractual problems with contractors or providers as soon as I become aware of their existence.
7. I initiate conversations and seek agreement with others about potential and actual referral arrangements.
8. I routinely provide and seek feedback as a means for growth and learning and to understand and resolve differences.
9. I compensate all those I hire in a timely fashion and according to our agreement.

E. Responsibility to Profession

1. I contribute to continuing professional development for employees/ colleagues and the profession.
2. I promote the development and dissemination of knowledge and skills in ways that enhance the profession.

3. I actively promote ethical practice. In the spirit of advancing the profession, I respectfully address questionable practices with others.
4. I avoid publically disparaging other professionals and ETD providers.

F. Global Responsibility

1. I use my work to make a positive impact on my clients, their communities, and the world.
2. I am aware that my actions and the work of my clients impact the world.
3. I act to deepen my understanding of the cultural filters that affect my view of the world and how those filters drive actions that affect others.
4. I respect cultures different from my own. I am conscious of how differences of culture, gender, race, age, nationality, religion, class, physical ability, educational background, sexual orientation, gender identity, and lifestyle affect my work. I understand that my experiences, beliefs, and privileges (however limited or abundant they appear to me) affect my view of the world and the actions I take.
5. I discover how issues of human rights, power, and social justice surface in my work and I courageously address them through inquiry, advocacy and alliance.
6. I model sound environmental and ecological practices including minimizing my own impact.
7. I contribute to the communities in which I live or work through service and/or support.