

## The ELVIS Guidebook

ELVIS is the Experiential Learning Variables & Indicators Scale. It is a research-based tool intended for those who would design transformative experiences for others. And who would be so bold (or foolhardy) to engage in such an enterprise? Parents, teachers, coaches, business leaders, trainers, tech designers, and anyone else seeking to help others unlock the extraordinary in their lives. And in truth, we need not limit it to designing experiences for others – the same psychology is operating within ourselves. ELVIS hits the right notes to understand how transformative experiences work and provides the tools for how we can become skilled designers of them.

### A Brief Introduction to Transformative Experiences

Transformative experiences happen to people every day all over the world, sometimes during exotic adventures and sometimes when just stopping by the local coffee shop for a mocha latte. Sometimes transformative experiences happen suddenly and are bounded by dramatic events in rapid succession. Other times they occur in slow motion, unfolding over weeks, months, or even years. Sometimes they are overwhelmingly positive, other times tragic. Sometimes they occur when we are “ready” for them and other times they take us by surprise. Regardless of the form they take, our transformative experiences punctuate our life journeys with the events that shape who we are, and ultimately embody what the human heart most craves -- the experience of being fully alive.

What if we could understand how transformative experiences work across a range of human experiences? What if we could use that understanding to intentionally design the transformative into our lives? And what if we could intentionally motivate, elevate, and inspire others through experiences that we design? After all, this is how we describe our very best teachers, bosses, artists, parents, and leaders -- those who have that ineffable ability to touch our hearts, provoke our minds, and conjure experiences that change us ever after. Is there a body of knowledge we can harness to become masters of this art? Can we become effective transformative experience designers? The answer is yes. We can indeed become skilled and knowledgeable in designing transformative experiences. It begins with a simple yet profound truth -- transformative experiences do not happen to us, they are created *by* us. They come from within.

We define a transformative experience as a **learning experience** that has an **identity impact**, changing the experiencer’s sense-of-self in some important way -- who you think you are, or who you want to become. Transformative experiences are subjective in nature, therefore on the surface, transformative experiences can look very different from one another, depending upon a wide range of experiencers and experiences. However, when we look closely at the nature of transformative experiences across this range, certain commonalities emerge due to the factor they all share -- the human brain. Together, these commonalities comprise a framework for understanding how transformative experiences operate and how we can become skilled designers of them.

There are three components to this framework They are: (1) *Discomfort Zone Experiences* that include challenging learning about ourselves and the world we inhabit; (2) *Narrative Translation*, as the way we make meaning from discomfort zone experiences (or any experiences); and (3) *Identity Construction*, our dynamic and constant process of becoming, which determines who we are psychologically and socially, as well as what we do, think we can do or even attempt, and who we aspire to be.

Essentially the framework works like this... transformative experiences fall into different *discomfort zones* according to their events, themes, context, and other internal and external factors. Ultimately we translate these experiences into narratives of different kinds, something our brains are hard-wired to do. If these experiences and their resulting narratives are powerful enough, they become part of our *identity-narratives*. Identity-narratives contain our most personal and valuable possession -- our sense-of-self. These are the stories that inform who we are, what we can do (and what we cannot do), and who we want to become. When an experience alters our sense-of-self through this process, it literally becomes a transformative experience, and it has the power to change our lives from within -- and the world without.

For an overview of the framework, see [Dr. McLain’s TEDx Talk](#).

## What's in the Guidebook?

ELVIS is based on decades of prior psychological research in identity theory, education, and the narrative study of lives, in addition to applied research by our team at XSci.org. ELVIS frames this research into seven actionable design elements known to be important across all transformative experiences.

Although individually significant, their real power is in concert with each other. When occurring together, these elements can create the optimal conditions for people to generate transformative experiences from within.

Each ELVIS element is scaled 1-5, as shown in the ELVIS rubric here. Inside this guidebook, you will find a detailed unpacking of the seven elements of ELVIS through short questionnaires associated with each one.



7 ELEMENTS OF TRANSFORMATIVE EXPERIENCES		ELVIS SCORE (1 = LOW, 5 = HIGH)				
PERCEIVED RISK	1 NO PHYSICAL/EMOTIONAL OR INTELLECTUAL RISK	2	3 MOD PHYSICAL/EMOTIONAL OR INTELLECTUAL RISK	4	5 HIGH PHYSICAL/EMOTIONAL OR INTELLECTUAL RISK	
LOCUS OF CONTROL	1 LEADER DIRECTED	2	3 EQUALLY LEADER & EXPERIENCER DIRECTED	4	5 EXPERIENCER DIRECTED	
IMMERSION	1 LOW ENGAGEMENT	2	3 MODERATE ENGAGEMENT	4	5 HIGH ENGAGEMENT & ACTIVE	
SOCIAL & EMOTIONAL INVOLVEMENT	1 LOW ENGAGEMENT	2	3 MODERATE ENGAGEMENT	4	5 HIGH ENGAGEMENT	
INTELLECTUAL CHALLENGE	1 LEADER TRANSMITTED	2	3 CO-FACILITATED EXPERIENCERS/LEADER	4	5 EXPERIENCER DRIVEN & DIRECTED	
IDENTITY INTEGRATION	1 LOW IDENTITY INTEGRATION	2	3 MODERATE IDENTITY INTEGRATION	4	5 HIGH IDENTITY INTEGRATION	
MEANING MAKING	1 UNSUPPORTED & UN-ENCOURAGED	2	3 SUPPORTED & SEMI-STRUCTURED	4	5 CENTRAL & EXTENSIVE	

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For example: What does perceived risk look like in a good design? What are the options for transferring control to experiencers? How can I structure better meaning-making into my experience? This Guidebook is intended to explore such questions and more in the contexts of your own designs. Therefore, you can answer the Guidebook questions in two ways:

1. **Prescriptively** - About an experience you are designing or modifying, or;
2. **Descriptively** - About an experience you've designed and wish to view through the "ELVIS lens."

In any case, keep in mind the following tips, when completing the questionnaires:

- Prepare for it to be messy. We're talking about human experience here, not measuring the distance to the nearest star.
- Remember there is flexibility in how you define the terms in the questionnaires (e.g., what counts as "reflective practice"). You can make notes about how you are defining your terms.
- Don't be alarmed if you can't find the "perfect" description or answer option when trying to answer questions.
- If for some reason, you feel that your design does not meet *any* of the criteria included in the answer options, make your best guess or you may leave it blank.
- **REMEMBER** that the "scores" are only *PART* of the point. ELVIS is really about guiding holistic experiential design that is informed by research -- not dictated by it.

Finally, consider you audience. Experiencers have different needs. The highest possible ELVIS score for your design may not be an appropriate objective. It may be that incrementally moving towards higher ELVIS scores over time for certain elements is the best strategy, depending on your participants, time,

and goals. ELVIS is a tool -- not a formula. Use it to enhance your knowledge and skill in designing transformative experiences. How **best** to use it... is up to you.

ASPIRE TO INSPIRE BEFORE YOU EXPIRE

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# Perceived Risk

When we take a risk, we risk failure. Risk has an inverse relationship to our sense of agency - or what we believe ourselves to be capable of. If something is low-risk for us, we have a high sense of agency that we are capable of handling whatever it is. We feel comfortable and confident. Alternately, if something is high-risk for us, we have a low sense of agency that we are capable of handling it and we feel uncomfortable, anxious, or fearful. What we perceive as risky for us defines our “discomfort zones.” The higher the perceived risk, the greater the challenge, the lower the sense of agency that we can succeed, and the deeper we go into our discomfort zones.

**Step 1:** For each question, please circle the number (1-5) that **best** describes your experience design, realizing that no one answer may be a perfect descriptor. To account for that, you also can make notes about what doesn't quite fit your design or questions you have in choosing an answer. Discussing these questions is an essential part of using this tool.

## 1. To what extent can experiencers make risk decisions within the experience?

(For risk-decisions to be valuable, they can never be foisted upon someone externally, they must always come from within)

1. Exposure to risk decisions is actively avoided or designed against.
2. Exposure to risk decisions is neither intended nor unintended. If it occurs it is accidental.
3. There is at least one risk decision designed into the experience, with an emphasis on experiencer choice.
4. There are multiple opportunities for experiencers to make risk decisions, but not tailored to personal discomfort zones (areas where their sense of agency is low).
5. There are multiple opportunities for experiencers to make their own risk decisions, tailored to their personal discomfort zones.

Design Notes:

## 2. How would you describe the opportunities for experiencers to take physical risks? (Note that physical risks are associated with sensory experiences and not necessarily presenting bodily harm potential)

1. Exposure to physical risk is actively avoided or designed against.
2. Exposure to physical risk is neither intended nor unintended. If it occurs it is accidental.
3. There is at least one option to take a physical risk designed into the experience.
4. There are multiple opportunities for experiencers to take physical risks, but not tailored to personal discomfort zones (areas where their sense of agency is low).
5. There are multiple opportunities for experiencers to take physical risks, tailored to their personal discomfort zones.

Design Notes:

3. How would you describe the opportunities for experiencers to take emotional risks? (Note that emotional risks are associated with feelings and attitudes, such as anger, disgust, fear, happiness, sadness, and surprise)

1. Exposure to emotional risk is actively avoided or designed against.
2. Exposure to emotional risk is neither intended nor unintended. If it occurs it is accidental.
3. There is at least one option to take an emotional risk designed into the experience.
4. There are multiple opportunities for experiencers to take emotional risks, but not tailored to personal discomfort zones (areas where their sense of agency is low).
5. There are multiple opportunities for experiencers to take emotional risks, tailored to their personal discomfort zones.

Design Notes:

4. How would you describe the opportunities for experiencers to take intellectual risks? (Note that intellectual risks are associated with cognitive challenges involving memory, comprehension, reasoning, analyzing, and problem solving)

1. Exposure to intellectual risk is actively avoided or designed against.
2. Exposure to intellectual risk is neither intended nor unintended. If it occurs it is accidental.
3. There is at least one option to take an intellectual risk designed into the experience.
4. There are multiple opportunities for experiencers to take intellectual risks, but not tailored to personal discomfort zones (areas where their sense of agency is low).
5. There are multiple opportunities for experiencers to take intellectual risks, tailored to their personal discomfort zones.

Design Notes:

5. To what extent are supports for failing forward integrated into the experience design?

1. Failure is not an option. It is avoided at all costs. If it occurs, it is considered a failure of the person in terms of their abilities, intelligence, or talent. Failure is shamed or hidden if it occurs.
2. If failure occurs, it is quietly minimized and not discussed for fear of embarrassment or destructive outcomes.
3. Failure is expected sometimes but not considered a reflection of a person's abilities, intelligence, or talent. Experiencers are encouraged to "shake it off" and bounce back as quickly as possible.
4. Failure is framed as a necessary learning experience. Experiencers are encouraged to think of it as normal and try to gain from it as much as they can, either on their own or through discussion with leaders or peers.
5. Failure is framed as a valuable learning experience and there are multiple structured ways to adopt a growth mindset, fully utilizing mistakes and negative risk-outcomes designed into the experience.

Design Notes:

**STEP 2:**

- ✓ Add up the numbers for your answer to each question above for your total preliminary results:  
**Perceived Risk Total** \_\_\_\_\_
- ✓ Use the key below to determine your zone. The chart below provides a holistic description or view of each zone and its indicators.
- ✓ Identify your Zone: \_\_\_\_\_

<b><u>Perceived Risk</u></b>	
Key Indicators: <ul style="list-style-type: none"> <li>• Ability of experiencers to make risk decisions</li> <li>• Nature of risk opportunities (physical, emotional, intellectual)</li> <li>• Supports for failing forward</li> </ul>	<b>Zone Score:</b> <b>21-25 ELVIS 5</b> <b>16-20 ELVIS 4</b> <b>11-15 ELVIS 3</b> <b>6-10 ELVIS 2</b> <b>0-5 ELVIS 1</b>
<b>ELVIS Zone 5</b> 21-25	Emphasis on personal exploration and discovery, and a feeling of ownership of the experience by experiencers. Multiple risk decisions are designed into the experience and tailored to the identities of experiencers, including combinations of physical, emotional, and intellectual risks. There are highly structured supports for failing forward in terms of a growth mindset. Note, this implies early designer-experiencer interactions to reveal elements of experiencer identities.
<b>ELVIS Zone 4</b> 16-20	Emphasis on active engagement through direct personal experience with multiple risk opportunities in combinations of physical, emotional, and intellectual risks, but not tailored to the individual identities. Failing forward through a growth mindset is encouraged but mostly unstructured and left to individual experiencers.
<b>ELVIS Zone 3</b> 11-15	Design includes at least one risk opportunity and/or risk decision combined with other elements of the experience, but no focus on individual risk decisions, different kinds of risk, nor are there supports for failing forward.
<b>ELVIS Zone 2</b> 6-10	Exposure to risk and risk decisions are neither designed for or against; if it occurs it is accidental. There is no attention to different kinds of risk. Failures are treated quietly and framed mostly negatively.
<b>ELVIS Zone 1</b> 0-5	Exposure to risk and risk decisions are actively avoided and/or designed against. Failure is considered to be avoided at all costs and reflect poorly on those failing in terms of their abilities and talents.

**Step 3: Holistic Zone Review.** Now that you read the holistic description, does it seem accurate? Would you move yourself into a different zone (or part of the zone) for this element? Looking back at your answers to the questionnaire, take notes on which indicators you think need to be prioritized to reach the next zone or if your current zone is appropriate to your goals and needs.

# Locus of Control

Locus of Control includes learning to recognize where control resides in our decisions and actions, then shifting from external to internal sources of permission. What kinds of permission? Permission to act, to participate, to engage with others, and to “own” the experience. The task of designers is to increasingly transfer command and control of the experience to the experiencers themselves through each component of the design.

**Step 1:** For each question, please circle the number (1-5) that **best** describes your experience design, realizing that no one answer may be a perfect descriptor. To account for that, you also can make notes about what doesn't quite fit your design or questions you have in choosing an answer. Discussing these questions is an essential part of using this tool.

## 1. Who has most of the control over the experience in general?

1. The experience designer (leader, educator, parent or coach) has the most control over the experience.
2. The experience designer (leader, educator, parent or coach) controls the big picture goals and objectives, but experiencers have some control over their own actions.
3. The experience designer (leader, educator, parent or coach) and the experiencers share control of the experience equally and in collaboration.
4. Experiencers have input and some control over both the big picture goals and objectives as well as the specific actions they engage in.
5. Experiencers have the most control over the experience, including setting the big picture goals and objectives as well as the specific actions they engage in. The experience designer (leader, educator, parent or coach) functions as a facilitator, helper, or embedded guide.

Design Notes:

## 2. What are the sources of permission for experiencers to make decisions and take action within the experience?

1. The source of permission is external to the experiencers. The experience designer (leader, educator, parent or coach) is usually the source of permission.
2. The source of permission is mostly external to the experiencers, residing with the experience designer but not entirely.
3. The source of permission is equally internal and external to the experiencers, with permission shared between experiencers and the designer.
4. The source of permission is mostly internal to the experiencers, but not entirely. The experience designer (leader, educator, parent or coach) has some permission power.
5. The source of permission to make decisions and take action is internal to the experiencers.

Design Notes:

### 3. What are the sources of permission for experiencers to engage with others during the experience, including when and how?

1. The source of permission for social engagement is external to the experiencers. The experience designer (leader, educator, parent or coach) is usually the source of permission.
2. The source of permission is mostly external to the experiencers, residing with the experience designer but not entirely. For example, leaders may decide when but not how, or vice-versa.
3. The source of permission for social engagement is equally internal and external to the experiencers, with permission shared between experiencers and the designer.
4. The source of permission is mostly internal to the experiencers, but not entirely. The experience designer (leader, educator, parent or coach) has some permission power.
5. The source of permission for social engagement is internal to the experiencers. Experiencers decide when and how to engage with others during the experience.

Design Notes:

### 4. How would you describe experiencers' "personal ownership" of the experience in terms of their ability to contribute to its design and/or implementation?

1. Experiencers have no personal ownership of the experience, with no control over the design or implementation.
2. Experiencers have some limited personal ownership of the experience. For example, they may have control over its implementation but not its design.
3. Personal ownership of the experience is shared equally between experiencers and the designer for both design and implementation.
4. Experiencers have high personal ownership of the experience, and are able or even invited to contribute to its design and/or implementation.
5. Experiencers have the most personal ownership and investment in the experience, in terms of both its design and implementation. In many cases, the experiencers ARE the experience designers.

Design Notes:

**STEP 2:**

- ✓ Add up the numbers for your answer to each question above for your total preliminary results:  
**Total** \_\_\_\_\_
- ✓ Use the key below to determine your zone. The chart below provides a holistic description or view of each zone and its indicators.
- ✓ Identify your zone: \_\_\_\_\_

<b><u>Locus of Control</u></b>	
Key Indicators: <ul style="list-style-type: none"> <li>• Degree of experiencer control over the experience</li> <li>• Sources of permission to make decision, take action, and engage socially</li> <li>• Degree of experiencers’ personal ownership and investment in the experience</li> </ul>	<b>Zone Score:</b> <b>17-20 ELVIS 5</b> <b>13-16 ELVIS 4</b> <b>9-12 ELVIS 3</b> <b>5-8 ELVIS 2</b> <b>0-4 ELVIS 1</b>
<b>ELVIS Zone 5</b> <b>17-20</b>	Experiencers have the most control over the experience, including the big picture goals down to the their own choices and actions. Permission to engage with the experience and others within it is internal to experiencers. Experiencers predominantly own the design and implementation of the experience, perhaps even becoming the designers. The designer (leader, educator, parent or coach) takes on the role of a facilitator or guide and is not the focus or center of the experience.
<b>ELVIS Zone 4</b> <b>13-16</b>	Experiencers have significant control over the experience, including the big picture goals down to the their own choices and actions. Permission to engage with the experience and others within it is mostly internal to experiencers but not entirely. Experiencers have a sense of ownership over the design and implementation of the experience.
<b>ELVIS Zone 3</b> <b>9-12</b>	Experiencers and designers share control over the experience design and implementation in collaboration. Permission to engage with the experience and others within it is also shared between experiencers and the designer (leader, educator, parent or coach), as is a sense of ownership over the design and implementation of the experience.
<b>ELVIS Zone 2</b> <b>5-8</b>	The designer (leader, educator, parent or coach) has control over the goals and objectives, but experiencers can make some choices regarding their own actions within the experience. Permission to engage is mostly external to the experiencers, residing primarily with the designer. Personal ownership over the experience is low for experiencers.
<b>ELVIS Zone 1</b> <b>0-4</b>	The designer (leader, educator, parent or coach) has control over both the goals and objectives, as well as the actions or activities of the experiencers. Permission to engage is external to the experiencers, residing firmly with the designer. There is little or no personal ownership over the experience for experiencers.

**Step 3: Holistic Zone Review.** Now that you read the holistic description, does it seem accurate? Would you move yourself into a different zone (or part of the zone) for this element? Looking back at your answers to the questionnaire, take notes on which indicators you think need to be prioritized to reach the next zone or if your current zone is appropriate to your goals and needs.

# Immersion

The simultaneous activation of multiple brain centers is strongly linked to heightened sense of awareness, motivation, powerful emotions, memory formation, and strong impacts on our sense-of-self. Our capacity to have transformative experiences is partially determined by our ability to engage on multiple immersive levels. In the design of transformative experiences, we call this, “Brain Layering,” and it involves both conscious and unconscious elements. Here we look at the activation of our six senses (sight, hearing, smell, taste, touch, and proprioception or the kinesthetic sense), as a starting place. Ideally, these inputs are then sequenced and synthesized into rich immersive experiences.

**Step 1:** For each question, please circle the number (1-5) that **best** describes your experience design, realizing that no one answer may be a perfect descriptor. To account for that, you also can make notes about what doesn't quite fit your design or questions you have in choosing an answer. Discussing these questions is an essential part of using this tool.

1. Please rate how much an experiencer may engage in the following sensory modalities in the design of the experience. (Note that your answers reflect what is intended or hoped for from the designer's perspective)

<b>Vision/Sight:</b>	1	2	3	4	5
<b>Hearing:</b>	1	2	3	4	5
<b>Taste:</b>	1	2	3	4	5
<b>Touch:</b>	1	2	3	4	5
<b>Smell:</b>	1	2	3	4	5
<b>Kinesthetic sense or Proprioception:</b>	1	2	3	4	5

Design Notes:

**STEP 2:**

- ✓ Add up the numbers for your answer to each question above for your total preliminary results:  
**Total** \_\_\_\_\_
- ✓ Use the key below to determine your zone. The chart below provides a holistic description or view of each zone and its indicators.
- ✓ Identify your zone: \_\_\_\_\_

<b><u>Immersion</u></b>	
Key Indicators: <ul style="list-style-type: none"> <li>• Number of sensory modalities engaged</li> <li>• Degree of engagement for each modality</li> <li>• Note that sequence and synthesis of sensory engagement is important, but not addressed here</li> </ul>	<b>Zone Score:</b> <b>25-30 ELVIS 5</b> <b>19-24 ELVIS 4</b> <b>13-18 ELVIS 3</b> <b>7-12 ELVIS 2</b> <b>0-6 ELVIS 1</b>
<b>ELVIS Zone 5</b> 25-30	Experiencers are highly and personally engaged in all sensory modalities, both consciously and unconsciously, as an intended part of the design of the experience. Additionally, thoughtful sequencing and synthesis of sensory experiences is part of the design with attention to the specific needs and abilities of experiencers.
<b>ELVIS Zone 4</b> 19-24	Experiencers are highly engaged in multiple sensory modalities, both consciously and unconsciously, as an intended part of the design of the experience. Additionally, thoughtful sequencing and synthesis of sensory experiences is part of the design.
<b>ELVIS Zone 3</b> 13-18	Experiencers are moderately engaged in multiple sensory modalities, either consciously or unconsciously, as an intended part of the design of the experience. However, sequencing and synthesis of sensory experiences is not necessarily emphasized.
<b>ELVIS Zone 2</b> 7-12	Experiencers are somewhat engaged in a few sensory modalities, either consciously or unconsciously, as a side benefit (not an intentional focus) of the design of the experience.
<b>ELVIS Zone 1</b> 0-6	Experiencers are not very engaged in any more than one or two sensory modalities and not as an intended part of the design of the experience.

**Step 3: Holistic Zone Review.** Now that you read the holistic description, does it seem accurate? Would you move yourself into a different zone (or part of the zone) for this element? Looking back at your answers to the questionnaire, take notes on which indicators you think need to be prioritized to reach the next zone or if your current zone is appropriate to your goals and needs.

## Social & Emotional Involvement

This element of transformative experiential design is a tricky one for which to establish an ELVIS score. Highly effective transformative design includes both opportunities for social group experiences as well as independent isolated experiences. For the designer, this means incorporating group-based experiences of coming together, collaborating, building empathy, respect, and a sense of belonging and social identity. But research indicates it is also often critical to include solitary challenges that build personal identities and transfer control, permission and ownership to experiencers, tapping directly into those often-scary emotions of having to “go it alone.” Strong designs need both.

Therefore, in producing an ELVIS score for this element, Question 1 first asks you to weight the design in terms of group-based vs. independent experiences. Question 2 then deals with group-based experiences, and Question 3 deals with individual experiences. Multiply your initial scores by the weighted factors. For example if your design is roughly 80% group-based and 20% independent, you would multiply your answers to Question 2 (group-based experiences) by 0.8 and answers to Question 3 (individual experiences) by 0.2. Then sum to find your total.

Finally, it is worth observing that social experiences invariably include elements of independence or isolation, and that independent experiences are invariably influenced by the social contexts from which we spring. So do not be surprised if some of the dynamics in either the group-based or independent experience descriptions seem to apply to both – they can and they often do. Capture these instances in the Design Notes section when you encounter them.

**Step 1:** For each question, please circle the number (1-5) that **best** describes your experience design, realizing that no one answer may be a perfect descriptor. To account for that, you also can make notes about what doesn't quite fit your design or questions you have in choosing an answer. Discussing these questions is an essential part of using this tool.

1. How would you describe the overall ratio of group-based vs. individual or independent experiences in the design? (Note: The most common metric for this is the amount of time experiencers will spend in each kind of experience)

100% group-based, 0% independent  
80% group-based, 20% independent  
60% group-based, 40% independent  
50% group-based, 50% independent  
40% group-based, 60% independent  
20% group-based, 80% independent  
0% group-based, 100% independent

Design Notes:

2. For the group-based experiences, please indicate how much an experiencer may engage in the following emotional dynamics in the design of the experience.

<b>Sense of group-belonging</b>	1	2	3	4	5
<b>Collaboration</b>	1	2	3	4	5
<b>Empathy &amp; compassion for others</b>	1	2	3	4	5
<b>Mutual respect</b>	1	2	3	4	5
<b>Observation, imitation, modeling</b>	1	2	3	4	5

Design Notes:

3. For the individual or independent experiences, please indicate how much an experiencer may engage in the following emotional dynamics in the design of the experience.

<b>Feelings of independence (including excitement and/or anxiety)</b>	1	2	3	4	5
<b>Self-reliance</b>	1	2	3	4	5
<b>Courage in response to challenges</b>	1	2	3	4	5
<b>Resilience in response to failures</b>	1	2	3	4	5
<b>Personal accomplishment</b>	1	2	3	4	5

Design Notes:



# Intellectual Challenge

The intellectual challenges of problem solving – acquiring and applying new knowledge integrated with prior understanding to confront real-world, personally relevant problems -- have consistently emerged in research as critical components in transformative experiences. In many designs, this begins with the training and preparation necessary to prepare for any given experience. But it also extends to decision-making during experiences, and meaning-making afterwards. It includes elements that demand various degrees of logic, cognitive flexibility, curiosity, wonder and skepticism. Experiences that lack this kind of intellectual engagement are often reported to be boring, not as relevant, or not as significant as other experiences.

**Step 1:** For each question, please circle the number (1-5) that **best** describes your experience design, realizing that no one answer may be a perfect descriptor. To account for that, you also can make notes about what doesn't quite fit your design or questions you have in choosing an answer. Discussing these questions is an essential part of using this tool.

## 1. How would you describe the way intellectual challenges (including new knowledge and/or skills development) are encountered by experiencers in your design?

1. Content, knowledge, and/or skills are transmitted one way -- from leader, educator, parent, or coach to the experiencers. Experiencers are expected to absorb and understand on their own.
2. Content, knowledge, and/or skills are transmitted from leader, educator, parent, or coach to the experiencers. Experiencers are expected to absorb and understand, but with some supports or structured interactions with the leader designed into the experience to facilitate understanding.
3. Experiencers are introduced to content, knowledge, and/or skills by the leader, educator, parent, or coach – but equally share responsibility with the leader for comprehension and synthesis with prior understanding.
4. Experiencers encounter content, knowledge, and/or skills in discovery mode in response to a challenge, project, or problem articulated by the leader, educator, parent, or coach. Their comprehension, synthesis and application of the new learning is supported with structured interactions between both the leader and among experiencer peers (if group-based).
5. Experiencers encounter content, knowledge, and/or skills in discovery mode in response to a challenge, project, or problem that they themselves define and articulate. Comprehension, synthesis, and application of the new learning is experiencer-driven and directed (and shared among experiencer peers if group-based). The leader, educator, parent, or coach role is to support and encourage as needed to facilitate an experiencer-directed experience.

Design Notes:

2. To what extent does the design allow for opportunities for the following intellectual experiences?

<b>Application of new and existing knowledge to new situations</b>	1	2	3	4	5
<b>Curiosity &amp; wonder</b>	1	2	3	4	5
<b>Skepticism</b>	1	2	3	4	5
<b>Problem solving (including problem-defining, ideation, cognitive flexibility, and experimentation)</b>	1	2	3	4	5

Design Notes:

**STEP 2:**

- ✓ Add up the numbers for your answer to each question above for your total preliminary results:  
**Total** \_\_\_\_\_
- ✓ Use the key below to determine your zone. The chart below provides a holistic description or view of each zone and its indicators.
- ✓ Identify your zone: \_\_\_\_\_

<b><u>Intellectual Challenge</u></b>	
Key Indicators: <ul style="list-style-type: none"> <li>• How experiencers encounter intellectual challenges (transmission vs. self-directed discovery)</li> <li>• Application of knowledge to new situations</li> <li>• Opportunities for problem-solving</li> </ul>	<b>Zone Score:</b> <b>21-25 ELVIS 5</b> <b>16-20 ELVIS 4</b> <b>11-15 ELVIS 3</b> <b>6-10 ELVIS 2</b> <b>0-5 ELVIS 1</b>
<b>ELVIS Zone 5</b> <b>21-25</b>	Experiencers encounter intellectual challenges (content, knowledge, and/or skills development) in discovery mode to confront problems that they themselves define and articulate. Intellectual engagement is experiencer-driven and directed (and shared among experiencer peers if group-based).
<b>ELVIS Zone 4</b> <b>16-20</b>	Experiencers encounter intellectual challenges (content, knowledge, and/or skills development) in discovery mode to confront problems that are define and articulated by the leader/designer. Intellectual engagement is co-facilitated between experiencers and the leader.
<b>ELVIS Zone 3</b> <b>11-15</b>	Experiencers encounter intellectual challenges (content, knowledge, and/or skills development) introduced skills by the leader, educator, parent, or coach. Intellectual engagement is co-facilitated between experiencers and the leader.
<b>ELVIS Zone 2</b> <b>6-10</b>	Content, knowledge, and/or skills are transmitted from leader, educator, parent, or coach to the experiencers. Intellectual engagement is designed to be somewhat co-facilitated between experiencers and the leader.
<b>ELVIS Zone 1</b> <b>0-5</b>	Content, knowledge, and/or skills are transmitted one way -- from leader, educator, parent, or coach to the experiencers.

**Step 3: Holistic Zone Review.** Now that you read the holistic description, does it seem accurate? Would you move yourself into a different zone (or part of the zone) for this element? Looking back at your answers to the questionnaire, take notes on which indicators you think need to be prioritized to reach the next zone or if your current zone is appropriate to your goals and needs.

# Identity Integration

Identity integration refers to the degree to which experiencers' identities are considered, accommodated, and/or utilized within the design of the experience. Recall that our operational definition of a transformative experience is one that changes an experiencer's sense-of-self (or identity) in some significant way. That is, who you believe yourself to be and/or who you aspire to become. The challenge for designers here is to incorporate experience elements that are explicitly intended to expand the experiencer's sense-of-self. This begins with understanding who experiencers are when going in and then builds, through some degree of customization of the experience, to present experiencers with opportunities for expansion of who they *can be* or *want to become* through the experience. Clearly then, one-size-does-not-fit-all, and flexibility to tailor the design to individuals is key. Such customized identity-based design commonly includes experiencer identity narratives (our self-stories), self-appraisals and catharsis challenges specifically designed to impact experiencers' initial identity-narratives.

**Step 1:** For each question, please circle the number (1-5) that **best** describes your experience design, realizing that no one answer may be a perfect descriptor. To account for that, you also can make notes about what doesn't quite fit your design or questions you have in choosing an answer. Discussing these questions is an essential part of using this tool.

## 1. To what extent are experiencers' identities considered or integrated into the experience design?

1. The experience design is one-size-fits-all with no accommodation of individual experiencer identities.
2. The experience design is mostly one-size-fits-all but includes limited efforts to establish personal relevancy and attends to experiencer preferences, abilities, motivations, or expectations.
3. The experience design is equally balanced between pre-established plans and efforts to establish personal relevancy and attends to participant preferences, abilities, motivations, or expectations.
4. The experience design is mostly based on the identities of experiencers and seeks to establish personal relevancy and attend to participant preferences, abilities, motivations, or expectations but includes some limited one-size-fits-all elements.
5. The experience is designed based on the identities of the experiencers as the central organizing framework.

Design Notes:

## 2. To what extent are changes or expansions of experiencers' identity narratives considered for assessment of impact or definitions of success?

1. Experiencer identity narratives are not considered for design assessments or goals for success.
2. Changes to experiencer identity narratives are a minor component of the design assessments or goals for success.
3. Changes to experiencer identity narratives are equally considered for design assessments or goals for success along with other program goals.
4. Changes to experiencer identity narratives are the dominant element for design assessments or definitions for success along with other program goals or definitions of success.
5. Design assessment and definitions for success are based on changes to experiencer identity narratives.

### Design Notes:

## 3. How would you describe the incorporation of personal catharsis challenges into the experience design?

1. There are no challenges -- personally tailored or otherwise -- designed into the experience.
2. Some limited challenges are designed into the experience but are not personally tailored to the identities of participants.
3. Challenges are an important part of the experience design and include some flexible elements that can be tailored to the identities of experiencers.
4. Challenges that are personally tailored to the identities of experiencers are an important part of the design, but are not intended to be cathartic.
5. Cathartic challenges that are personally tailored to the identities of experiencers are central to the experience design.

### Design Notes:

**STEP 2:**

- ✓ Add up the numbers for your answer to each question above for your total preliminary results:  
**Total** \_\_\_\_\_
- ✓ Use the key below to determine your zone. The chart below provides a holistic description or view of each zone and its indicators.
- ✓ Identify your zone: \_\_\_\_\_

<b><u>Identity Integration</u></b>	
<p>Key Indicators:</p> <ul style="list-style-type: none"> <li>• Degree of participant identity integration into the experience design (including personal relevancy, preferences, abilities, motivations, or expectations)</li> <li>• Degree of participant identity integration into the design assessment or definitions of success</li> <li>• Utilization of cathartic challenges within the experience design</li> </ul>	<p><b>Zone Score:</b>  <b>13-15 ELVIS 5</b>  <b>10-12 ELVIS 4</b>  <b>7-9 ELVIS 3</b>  <b>4-6 ELVIS 2</b>  <b>0-3 ELVIS 1</b></p>
<b>ELVIS Zone 5</b> 17-20	Experiencers' identities are the central organizing framework of the design, including elements to establish personal relevancy, attend to experiencer preferences, abilities, motivations, and expectations, as well as integrating experiencer identity into design assessments and definitions of success, and the inclusion of catharsis challenges.
<b>ELVIS Zone 4</b> 13-16	Experiencers' identities are integrated into the design in most (but not all) of the following ways: for establishing personal relevancy; attending to experiencer preferences, abilities, motivations, and expectations; considering experiencer identity in design assessments and definitions of success, and the inclusion of catharsis challenges.
<b>ELVIS Zone 3</b> 9-12	Experiencers' identities are a co-equal priority in the experience design alongside other elements that are less customized to individuals (such as tasks, itineraries, skills and/or knowledge acquisition, for example). Experiencers' identities may be integrated in some of the following ways: for establishing personal relevancy; attending to experiencer preferences, abilities, motivations, and expectations; considering experiencer identity in design assessments and definitions of success, and the inclusion of catharsis challenges.
<b>ELVIS Zone 2</b> 5-8	Experiencers' identities are not very important to the experience design but not ignored. They may be integrated into the design in at least one of the following ways: for establishing personal relevancy; attending to experiencer preferences, abilities, motivations, and expectations; considering experiencer identity in design assessments and definitions of success, and the inclusion of catharsis challenges.
<b>ELVIS Zone 1</b> 0-4	Experiencers' identities are not considered in the design, nor are there elements to establish personal relevancy, attend to experiencer preferences, abilities, motivations, or expectations, or integrate experiencer identity into design assessments and definitions of success. Also, no catharsis challenges are designed into the experience.

**Step 3: Holistic Zone Review.** Now that you read the holistic description, does it seem accurate? Would you move yourself into a different zone (or part of the zone) for this element? Looking back at your answers to the questionnaire, take notes on which indicators you think need to be prioritized to reach the next zone or if your current zone is appropriate to your goals and needs.

# Meaning Making

As all of our experiences are ultimately transformed into narratives, the process of meaning making occurs through the wonderfully rich and multi-faceted generation of personal narratives derived from our experiences. Recall that for experiences to be transformative, these experience narratives must in some way inform, influence, or modify our identity narratives. For experience designers, this means incorporating multiple structured ways for people to purposively translate their experiences into self-stories, construct the meaning of those stories in relation to other aspects of their identities, and thereby become self-aware authors of their personal experiences. Design elements that accomplish this include embedded reflections (pre, during, and post experience), discovery groups, and autobiographical story-making and story-telling across a range of styles and media, to list just a few.

**Step 1:** For each question, please circle the number (1-5) that **best** describes your experience design, realizing that no one answer may be a perfect descriptor. To account for that, you also can make notes about what doesn't quite fit your design or questions you have in choosing an answer. Discussing these questions is an essential part of using this tool.

## 1. How would you describe the incorporation of reflective practice within the experience? (referring to any strategies that promote experiencer reflection)

1. Reflective practice is not part of the experience design in any way.
2. Reflective practice is not explicitly part of the design but may occur by accident or if experiencers chose to do so privately.
3. Reflective practice is a part of the experience design, but often occurs only at or near the end of the experience. It is semi-structured or unstructured.
4. Reflective practice is an important part of the experience design and occurs both during and after the experience in a structured way.
5. Reflective practice is central to the design. Experiencers are explicitly encouraged and supported to engage in personal reflection pre-experience, during the experience, and post-experience.

Design Notes:

## 2. To what extent are experiencers encouraged to construct personal narratives about the experience?

1. Personal narrative construction is not encouraged in the experience design at any point.
2. Personal narrative construction is acceptable but not explicitly encouraged in the experience design.
3. Personal narrative construction is encouraged along with other forms of reflection but is not explicitly designed into the experience.
4. Personal narrative construction is encouraged along with other forms of reflection and explicitly designed into the experience.
5. Personal narrative construction is the primary form of reflection explicitly encouraged in the experience design and there are multiple structured opportunities for it throughout the design (not just at the beginning and/or end).

Design Notes:

3. To what extent are the following supports or structures used to facilitate experienter meaning making?

<b>Embedded Reflections</b> (thinkbooks, concept maps, feedback, etc.)	1 not used	2 unstructured	3 post-only	4 pre-post	5 pre, during, post
<b>Journaling</b>	1	2	3	4	5
<b>Discovery Groups</b> (or peer group sharing)	1	2	3	4	5
<b>Social Media</b>	1	2	3	4	5
<b>Autobiographical Story-making/telling</b>	1	2	3	4	5
<b>Other</b>	1	2	3	4	5

Design Notes:

4. How would you describe the opportunities for experiencers to share and discuss their personal reflections?

1. There are no opportunities for experiencers to share and discuss their personal reflections.
2. Opportunities for experiencers to share and discuss their personal reflections are neither intended nor unintended. If it occurs it is accidental.
3. There is at least one opportunity for experiencers to share and discuss their personal reflections and it is explicitly designed into the experience.
4. There are multiple opportunities for experiencers to share and discuss their personal reflections explicitly designed into the experience.
5. There are multiple opportunities for experiencers to share and discuss their personal reflections pre, during, and post experience. These opportunities are highly structured and explicitly designed into the experience.

Design Notes:

5. To what extent are experiencers' meaning-making reflections considered for assessment of impact or definitions of success?

1. Experiencer reflections are not considered for design assessments or goals for success.
2. Experiencer reflections are a minor component of the design assessments or goals for success.
3. Experiencer reflections are equally considered for design assessments along with other outcomes.
4. Experiencer reflections are the dominant element for design assessments or definitions for success along with other program goals or definitions of success.
5. Design assessment and definitions for success are based on experiencer reflections.

Design Notes:

**STEP 2:**

- ✓ Add up the numbers for your answer to each question above for your total preliminary results:  
**Total** \_\_\_\_\_
- ✓ Use the key below to determine your zone. The chart below provides a holistic description or view of each zone and its indicators.
- ✓ Identify your zone: \_\_\_\_\_

<b><u>Meaning Making</u></b>	
Key Indicators: <ul style="list-style-type: none"> <li>• Multiple structured ways to translate experiences into self-stories</li> <li>• Pre, during, and post reflections in the design</li> <li>• Opportunities to share and discuss reflections</li> <li>• Experiencer reflections used in design assessment</li> </ul>	<b>Zone Score:</b> <b>41-50 ELVIS 5</b> <b>31-40 ELVIS 4</b> <b>21-30 ELVIS 3</b> <b>11-20 ELVIS 2</b> <b>0-10 ELVIS 1</b>
<b>ELVIS Zone 5</b> 41-50	Experiencer meaning-making and personal narrative construction is central to the design with multiple structured methods and opportunities for reflective practice embedded into the experience. These occur pre, during and post experience and include both individual reflection and structured opportunities for sharing and discussing. Experiencer reflections are also the major element in design assessment and definitions of success.
<b>ELVIS Zone 4</b> 31-40	Experiencer meaning-making and personal narrative construction is important to the design with multiple structured methods and opportunities for reflective practice embedded both during and after the experience. Both individual reflection and structured opportunities for sharing and discussing are usually included. Experiencer reflections are also an element in design assessment and definitions of success.
<b>ELVIS Zone 3</b> 21-30	Experiencer meaning-making is a part of the design but usually occurs at or near the end of the experience. It may include individual reflection and at least one opportunity for sharing and discussing. Such reflective practice is semi-structured or unstructured. Experiencer reflections are equally considered in design assessment along with other outcomes.
<b>ELVIS Zone 2</b> 11-20	Experiencer meaning-making is not explicitly designed into the experience but may occur by accident or initiated by experiencers themselves. Personal narrative construction is not part of the design, nor is experiencer reflection considered in design assessment.
<b>ELVIS Zone 1</b> 0-10	Experiencer meaning-making is not part of the design and is not encouraged or supported. Personal narrative construction is also not part of the design, nor is experiencer reflection considered in design assessment.

**Step 3: Holistic Zone Review.** Now that you read the holistic description, does it seem accurate? Would you move yourself into a different zone (or part of the zone) for this element? Looking back at your answers to the questionnaire, take notes on which indicators you think need to be prioritized to reach the next zone or if your current zone is appropriate to your goals and needs.

## Composite ELVIS Scores

Finally, compile your scores for each of the seven ELVIS elements into the rubric below by circling or marking the appropriate boxes. This will provide you with a **snapshot** of the experiential nature of your design and a benchmark for future development. It can also be used as the basis for assessment of your design. For example, knowing what your intended design goals are in terms of ELVIS, you can then gather feedback from your experiencers to reveal if their perceptions matched your intended design goals or if there were gaps and mismatches (and why).

More copies of the Composite Score Sheet are included in the following pages as well for you to use on additional Designs.



### ELVIS (EXPERIENTIAL LEARNING VARIABLES AND INDICATORS SCALE)

#### COMPOSITE SCORE SHEET

7 ELEMENTS OF TRANSFORMATIVE EXPERIENCES	ELVIS SCORE (1 = LOW, 5 = HIGH)				
PERCEIVED RISK	1 NO PHYSICAL/EMOTIONAL OR INTELLECTUAL RISK	2	3 MOD PHYSICAL/EMOTIONAL OR INTELLECTUAL RISK	4	5 HIGH PHYSICAL/EMOTIONAL OR INTELLECTUAL RISK
LOCUS OF CONTROL	1 LEADER DIRECTED	2	3 EQUALLY LEADER & EXPERIENCER DIRECTED	4	5 EXPERIENCER DIRECTED
IMMERSION	1 LOW ENGAGEMENT	2	3 MODERATE ENGAGEMENT	4	5 HIGH ENGAGEMENT & ACTIVE
SOCIAL & EMOTIONAL INVOLVEMENT	1 LOW ENGAGEMENT	2	3 MODERATE ENGAGEMENT	4	5 HIGH ENGAGEMENT
INTELLECTUAL CHALLENGE	1 LEADER TRANSMITTED	2	3 CO-FACILITATED EXPERIENCERS/LEADER	4	5 EXPERIENCER DRIVEN & DIRECTED
IDENTITY INTEGRATION	1 LOW IDENTITY INTEGRATION	2	3 MODERATE IDENTITY INTEGRATION	4	5 HIGH IDENTITY INTEGRATION
MEANING MAKING	1 UNSUPPORTED & UN-ENCOURGED	2	3 SUPPORTED & SEMI-STRUCTURED	4	5 CENTRAL & EXTENSIVE

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# ELVIS (EXPERIENTIAL LEARNING VARIABLES AND INDICATORS SCALE) COMPOSITE SCORE SHEET

7 ELEMENTS OF TRANSFORMATIVE EXPERIENCES	ELVIS SCORE (1 = LOW, 5 = HIGH)				
	1	2	3	4	5
PERCEIVED RISK	NO PHYSICAL/EMOTIONAL OR INTELLECTUAL RISK		MOD PHYSICAL/EMOTIONAL OR INTELLECTUAL RISK		HIGH PHYSICAL/EMOTIONAL OR INTELLECTUAL RISK
	1	2	3	4	5
LOCUS OF CONTROL	LEADER DIRECTED		EQUALLY LEADER & EXPERIENCER DIRECTED		EXPERIENCER DIRECTED
	1	2	3	4	5
IMMERSION	LOW ENGAGEMENT		MODERATE ENGAGEMENT		HIGH ENGAGEMENT & ACTIVE
	1	2	3	4	5
SOCIAL & EMOTIONAL INVOLVEMENT	LOW ENGAGEMENT		MODERATE ENGAGEMENT		HIGH ENGAGEMENT
	1	2	3	4	5
INTELLECTUAL CHALLENGE	LEADER TRANSMITTED		CO-FACILITATED EXPERIENCERS/LEADER		EXPERIENCER DRIVEN & DIRECTED
	1	2	3	4	5
IDENTITY INTEGRATION	LOW IDENTITY INTEGRATION		MODERATE IDENTITY INTEGRATION		HIGH IDENTITY INTEGRATION
	1	2	3	4	5
MEANING MAKING	UNSUPPORTED & UN-ENCOURAGED		SUPPORTED & SEMI-STRUCTURED		CENTRAL & EXTENSIVE
	1	2	3	4	5

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## ELVIS (EXPERIENTIAL LEARNING VARIABLES AND INDICATORS SCALE) COMPOSITE SCORE SHEET

7 ELEMENTS OF TRANSFORMATIVE EXPERIENCES	ELVIS SCORE (1 = LOW, 5 = HIGH)				
PERCEIVED RISK	1	2	3	4	5
	NO PHYSICAL/EMOTIONAL OR INTELLECTUAL RISK		MOD PHYSICAL/EMOTIONAL OR INTELLECTUAL RISK		HIGH PHYSICAL/EMOTIONAL OR INTELLECTUAL RISK
LOCUS OF CONTROL	1	2	3	4	5
	LEADER DIRECTED		EQUALLY LEADER & EXPERIENCER DIRECTED		EXPERIENCER DIRECTED
IMMERSION	1	2	3	4	5
	LOW ENGAGEMENT		MODERATE ENGAGEMENT		HIGH ENGAGEMENT & ACTIVE
SOCIAL & EMOTIONAL INVOLVEMENT	1	2	3	4	5
	LOW ENGAGEMENT		MODERATE ENGAGEMENT		HIGH ENGAGEMENT
INTELLECTUAL CHALLENGE	1	2	3	4	5
	LEADER TRANSMITTED		CO-FACILITATED EXPERIENCERS/LEADER		EXPERIENCER DRIVEN & DIRECTED
IDENTITY INTEGRATION	1	2	3	4	5
	LOW IDENTITY INTEGRATION		MODERATE IDENTITY INTEGRATION		HIGH IDENTITY INTEGRATION
MEANING MAKING	1	2	3	4	5
	UNSUPPORTED & UN-ENCOURAGED		SUPPORTED & SEMI-STRUCTURED		CENTRAL & EXTENSIVE

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# ELVIS (EXPERIENTIAL LEARNING VARIABLES AND INDICATORS SCALE) COMPOSITE SCORE SHEET

7 ELEMENTS OF TRANSFORMATIVE EXPERIENCES	ELVIS SCORE (1 = LOW, 5 = HIGH)				
PERCEIVED RISK	1	2	3	4	5
	NO PHYSICAL/EMOTIONAL OR INTELLECTUAL RISK		MOD PHYSICAL/EMOTIONAL OR INTELLECTUAL RISK		HIGH PHYSICAL/EMOTIONAL OR INTELLECTUAL RISK
LOCUS OF CONTROL	1	2	3	4	5
	LEADER DIRECTED		EQUALLY LEADER & EXPERIENCER DIRECTED		EXPERIENCER DIRECTED
IMMERSION	1	2	3	4	5
	LOW ENGAGEMENT		MODERATE ENGAGEMENT		HIGH ENGAGEMENT & ACTIVE
SOCIAL & EMOTIONAL INVOLVEMENT	1	2	3	4	5
	LOW ENGAGEMENT		MODERATE ENGAGEMENT		HIGH ENGAGEMENT
INTELLECTUAL CHALLENGE	1	2	3	4	5
	LEADER TRANSMITTED		CO-FACILITATED EXPERIENCERS/LEADER		EXPERIENCER DRIVEN & DIRECTED
IDENTITY INTEGRATION	1	2	3	4	5
	LOW IDENTITY INTEGRATION		MODERATE IDENTITY INTEGRATION		HIGH IDENTITY INTEGRATION
MEANING MAKING	1	2	3	4	5
	UNSUPPORTED & UN-ENCOURAGED		SUPPORTED & SEMI-STRUCTURED		CENTRAL & EXTENSIVE

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