

“  
**THE  
MOUNTAINS  
ARE CALLING**

*and I must go...*

”

John Muir

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**A STRATEGIC FRAMEWORK FOR  
THE GROWTH AND DEVELOPMENT  
OF THE OUTWARD BOUND TRUST  
2016-2020**

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**THE  
OUTWARD  
BOUND TRUST**

# THE MOUNTAINS ARE CALLING

At The Outward Bound Trust we have considered the values that influence our actions and attitudes; we have carefully thought about our purpose and contribution in the modern world; we are clear about the things that make us special and different; and we have discussed how best to reinforce these strengths in the years ahead.

Above all, we have determined how we can continue to make a difference to the lives of an ever increasing number of young people, to help them take on whatever challenges life might throw at them.

*The Mountains Are Calling* is the product of our deliberations and will guide our work in the coming years.

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# MEET JO



“

I don't think I'm much good at anything. I tend to give up if it feels hard, I never come first anyway. Someone is always better than me, so no point saying I need help it just makes you look bad and not sure who I'd ask. I don't want to do anything or go anywhere new, I'm happy with what I know. I'm not missing much. I don't like to talk to other people, no point in trying to make new friends. I already have my friends, even when I'm not with them it's easy enough to pass the time with them online.

”

Jo is not a hugely significant statistic. She is not on the radar of social services and has never been in trouble with the police. She is never any trouble at school and her teachers like her. They would love to do more for her but time and resources are stretched to the limit. Jo's parents love her. They work hard and try and encourage her, but she is a teenager and does not always take advice well from that source. She has no real role models, certainly not to talk with.

Jo is 15. She is capable of so much more, but is unable to aspire to this because of uncertainty in herself, and her skills, and fear of the unknown or trying something new. This will limit her in life, in school and at work.

Sadly Jo is not alone, 1 in 10 young people in the UK have low levels of well-being<sup>1</sup>. A recent international study of children's subjective well-being ranked children in England 14th out of 15 for their satisfaction with life as a whole<sup>2</sup>. In 2015, employers reported shortcomings in school leavers' self-management and resilience, communication and attitudes towards work, and identified these as priority areas for action in the education of young people. This is a serious problem – with 55% of businesses reporting that they are not confident there will be enough people available in the future with the necessary attributes to fill their high-skilled jobs<sup>3</sup>.

Of course, Jo is anything but a statistic.

<sup>1</sup> The Children's Society, Good Childhood Report 2015 <sup>2</sup> The Children's Society, Good Childhood Report 2015

<sup>3</sup> CBI (2015) Inspiring Growth: CBI/Pearson Education and Skills Survey 2015

# IT IS EASY TO OVERCOMPLICATE SIMPLE THINGS.

The fact is that if young people are to succeed in education or employment, be fulfilled within their families or become active contributors to their communities, then they need to develop certain attributes. Chief amongst these are an appropriate level of self-belief, the resilience to bounce back from setbacks, a willingness to accept responsibility, the ability to plan and set goals and the capacity to build positive relationships with those around them.

All young people, whatever their circumstances, background or level of aspiration, need to learn to nurture these life-enhancing qualities.

“

This course makes you realise ‘what’s stopping me doing that?’ If you’ve got the dreams just go for them and give it your all. I think being on this made me realise that I’m not just nothing. I can be whatever I want to be if I put my mind to it.

”

Outward Bound participant 2015



# OUR BELIEF

We are all better than we know. If only we can be brought to realise this, we may never again be prepared to settle for anything less.

The Outward Bound Trust exists to turn these words into reality for an ever-increasing number of young people.

# OUR MISSION

To unlock the potential in young people through learning and adventure in the wild.

# OUR CORE VALUES

**A belief that we all have undiscovered potential.**  
We aim to create moments when everyone can see and believe in themselves as never before and translate such moments into lessons for everyday life.

**A belief in the power and intensity of learning through adventure in the wild.**  
As a means of bringing out the best in people.

**A deep appreciation of the balance between risk, reward and responsibility.**  
We want people to have intense experiences with real consequences and powerful, positive and memorable outcomes.

**A spirit of respect and compassion.**  
We aim to stretch people both physically and mentally. In doing so we act with care, concern and generosity towards people and the natural environment.



# THE TRUST'S DISTINCTIVE FEATURES

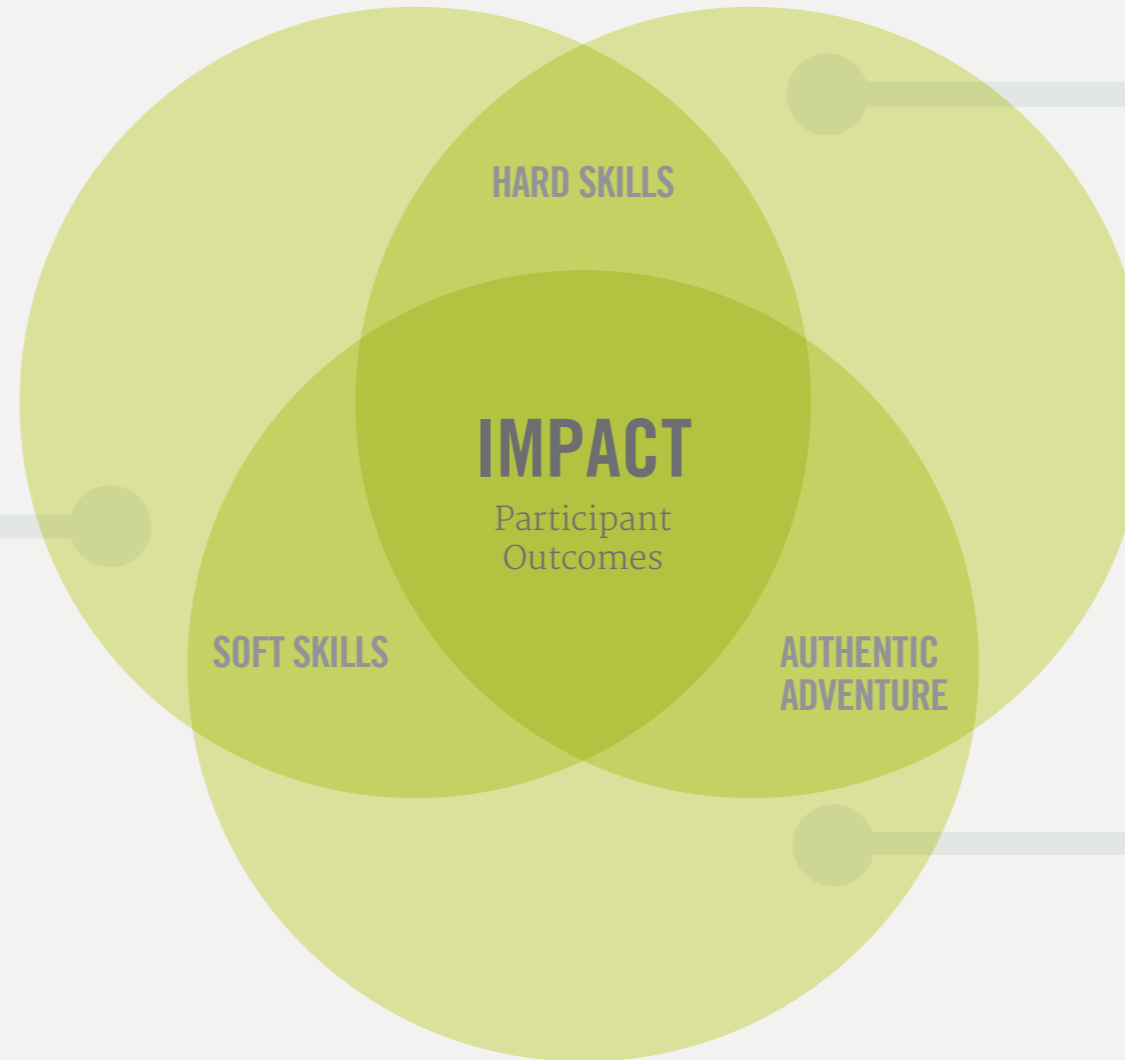
An Outward Bound course is all about learning and the impact this has on the individual. This is achieved through skilful people working in an inspiring and challenging environment and applying an effective process. This is best illustrated by means of the following diagram.

## OUR PEOPLE

Experienced educators who facilitate learning

Challenge and impel people to perform

Highly qualified and experienced outdoor instructors



## OUR PLACES

Real adventures in the natural environment

Inspiring locations provide limitless opportunities

Scale of experience and journeys is unique and challenging

## OUR PROCESS

Personal journey

Experiential and transferable

Continuous reviewing and reflection



# STRATEGIC FRAMEWORK SUMMARY

*The Mountains Are Calling* sets out the direction for The Outward Bound Trust over the next four years. It is a guiding framework to enable us to make more detailed plans so we can take The Trust to the next logical stage in its evolution. We will use it as the key point of reference when we make decisions, allocate resources, develop our courses and account to the public.

The focus of our strategy is to keep growth and consolidation in balance and ensure we have a staff team that can achieve both these priorities in parallel. We can become bigger and we can become better if we also become stronger.

This strategic framework details three priorities and three areas of experimentation. This is where we will concentrate our efforts. We have identified targets to meet by 2020 which will reflect our progress against those priorities.

# THREE PRIORITIES THREE EXPERIMENTS

## PRIORITY ONE: BECOMING BIGGER

1

To significantly increase the number of young people we work with each year.

## PRIORITY TWO: BECOMING BETTER

2

To ensure the quality of the learning and quality of adventures at an Outward Bound centre are second to none.

## PRIORITY THREE: BECOMING STRONGER

3

To build a staff team able to operate to the highest standards in a bigger organisation.

## THREE AREAS OF EXPERIMENTATION: BECOMING BOLDER



To better use evaluation, external research and innovation to inform our practice.

To assess how we might more effectively target young people who would benefit most from an Outward Bound course.

To take the first steps in creating a staff team that more closely represents the backgrounds of the young people participating in our courses.





# 1

## PRIORITY ONE BECOMING BIGGER

In the words of Kurt Hahn, co-founder of The Outward Bound Trust: *“We are all better than we know. If only we can be brought to realise this, we may never again be prepared to settle for anything less”.*

Our core belief is very simple. We exist to turn these words into reality for an ever increasing number of young people.

In 2016 the world of education faces huge uncertainty. The introduction of the Apprenticeship Levy in 2017 will fundamentally change routes into employment by creating a shift away from university as the destination choice for schools towards higher and degree standard apprenticeships.



# PRIORITY ONE

## BECOMING BIGGER

We anticipate that there will be a greater need for schools to focus on workplace behaviours and attributes that prepare their leavers to take up apprenticeships; and a need for employers to create relationships with schools as they seek to recruit direct from school rather than from university. Our course outcomes are excellent at preparing young people for the world of work.

In 2015 we worked with 24,000 young people. Changes to the external environment, such as the example above, and success on many fronts over the last decade means that the time is now right to make a positive step-change in size, whilst ensuring that financial disadvantage continues to not be a barrier to participation.

### THIS CREATES THREE VERY IMMEDIATE AND OBVIOUS CHALLENGES THAT WE ARE COMMITTED TO MEET DURING THE LIFETIME OF THIS STRATEGY:

- 1** We will seek to acquire a new residential centre of size and scale that when fully utilised will enable us to work with an additional 7,000 young people each year.
- 2** We will invest in our fundraising capacity and raise substantially more money in order to meet the capital expenditure requirements of a new centre and increase our annual bursary fundraising operation from £4 million gross per year to £5 million.
- 3** We will invest in a bolder marketing and communications proposition to raise our external voice and strengthen the brand. In doing so we are very aware that as a charity we have finite resources and our efforts must be targeted.



# 2

## PRIORITY TWO BECOMING BETTER

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It is our aim to ensure that the quality of learning through adventure at an Outward Bound centre is second to none. For every young person the experience must be intense and the impact significant.

Over the last decade much has been done to improve the quality and consistency of our courses, to upgrade the equipment and facilities and to make our “back office” functions effective and efficient. Being the very best we can be is a habit and it lies not in the poetry of our aspirations but in the prose of our everyday work.

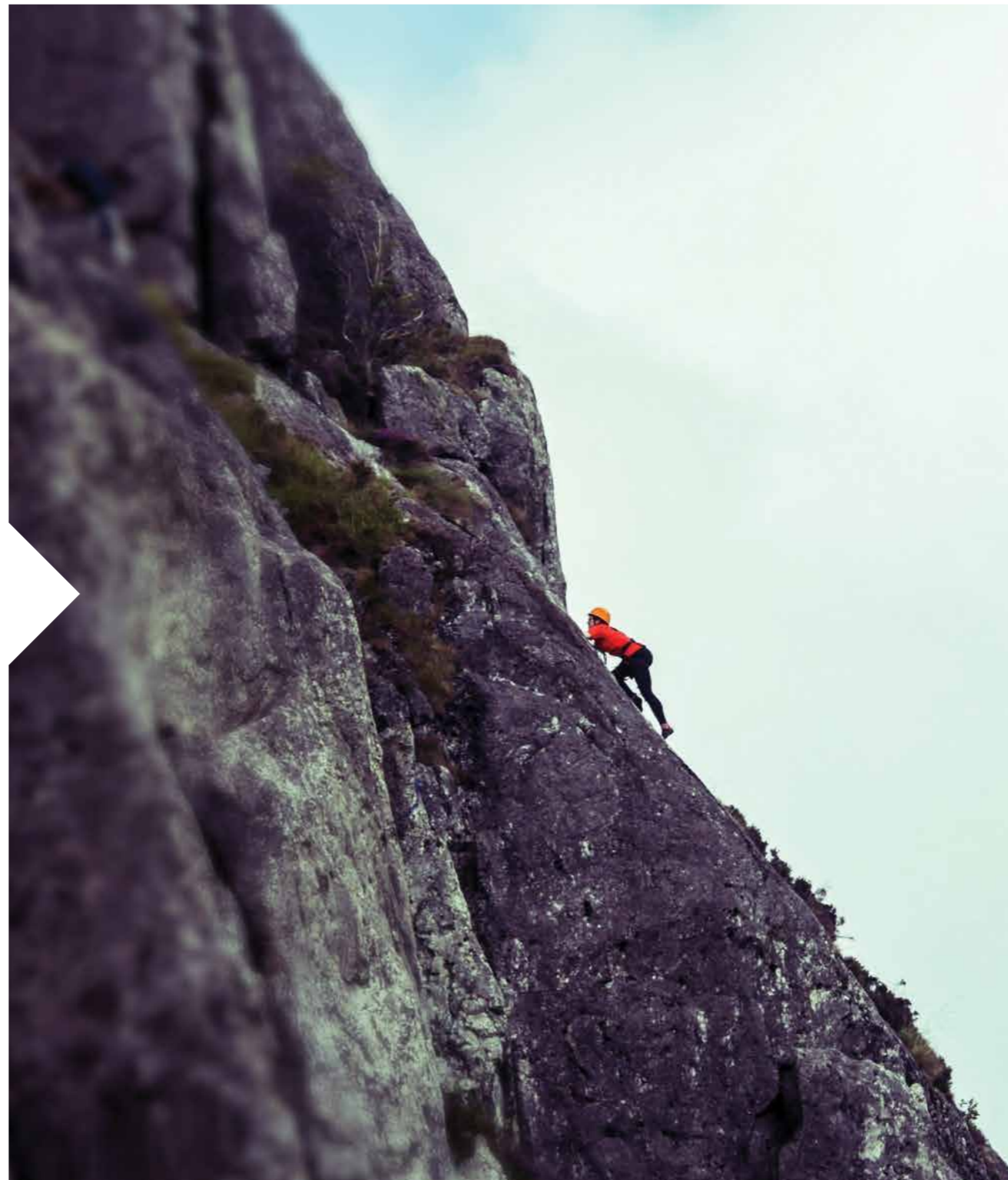


## PRIORITY TWO BECOMING BETTER

Our aim is to continuously improve. During the lifetime of this strategy there are five areas to which we will give particular focus:

### THE VERY BEST LEARNING THROUGH ADVENTURE FOR YOUNG PEOPLE

- Our courses must be routinely excellent.
- All centres now have a dedicated Operations function aimed at ensuring that resources are used in such a way as to maximise the scope for genuinely adventurous programmes. All centres now have dedicated Learning and Adventure Managers supporting instructors either on the mountainside or on the water in the delivery of both authentic adventure and the powerful personal learning that true adventure can unlock.
- **The reorganisation of our centres along the lines briefly summarised above took place in 2015. We will now allow time for the benefits of these changes to be fully realised.**



### IMPROVING OUR FACILITIES

- Our centres are places of immense character. Almost without exception, they are very old buildings in awe-inspiring locations battered by both the British weather and countless thousands of excited young people. In such an environment the challenges of keeping everyone warm and fed and ready to go out each day with fit for purpose clothing and equipment are not to be underestimated.
- Over the last decade we have raised and spent more than £7 million upgrading the quality of our centres, including very substantial redevelopment projects at the Aberdovey and Ullswater centres. Smaller “mop up” projects are still required, particularly with respect to the dining hall at Aberdovey and creating additional bed stock at Eskdale, and these upgrades will be undertaken in the next few years.
- **Over the life time of this plan the Loch Eil centre will be the principal focus of our redevelopment work. By 2020, we aim to have invested a further £2 million in the modernisation of the equipment stores, review space, dormitories and recreation area at Loch Eil.**

## IMPROVING OUR SYSTEMS

- The Outward Bound Trust operation is busy and surprisingly complicated. The sheer volume of young people and their differing physical and educational needs, the balancing of adventure with risk management, the scale of the annual fundraising challenge and the understandable reporting requirements of our many donors and buyers are just some elements of the on-going management task.
- To do all of this exceptionally well we need to have back office people and systems that are absolutely top quality. In 2014, we achieved ISO 9001 certification as a means of testing these systems and the staff who oversee them against rigorous external standards.
- **During the lifetime of this plan, we will maintain our ISO 9001 certification and with it the commitment to the continuous improvement of all our systems and processes. We will invest in our IT and systems so that they work effectively for all the different functions within The Trust.**

## IMPROVING OUR FINANCIAL STEWARDSHIP

- Our General Fund is the annual Profit and Loss Account for the charity, which records the balance between our fundraised and “commercially sold” income and the annual cost of delivering our courses. The challenge is to balance our mission (Outward Bound courses for all young people irrespective of their ability to pay) with the realities of the market (the need to remain financially viable).
- If our General Fund is resilient we have money to invest in ideas, equipment and people. If our General Fund records a deficit we must dip into our unrestricted reserves and use money we would rather use creatively in order to backfill this “black hole”. In addition, like any charity, we need to have financial reserves to guard against a rainy day.
- We can only concentrate on doing the best for young people both today and into the future if we can manage our General Fund and reserves efficiently. Recent high profile implosions at other charities provide adequate proof of the importance of sensible financial stewardship.
- **During the lifetime of this plan, we are committed to the generation of a minimum £350k annual surplus from the general fund and maintaining unrestricted reserves of £2 million.**

## REALISING THE RETURN ON RECENT “INVESTMENTS”

**Over the last couple of years, we have started a number of long term initiatives and we remain committed to seeing these through.**

- In 2015 we entered into a partnership with the National Trust in Wales that has seen us take over operations for Ogwen Cottage, the small iconic outdoor education centre at the foot of Tryfan in the heart of the Snowdonia National Park. Run as a satellite to our Aberdovey centre but more intimate in size and nature, Ogwen Cottage has the potential to become a very special new addition to the Outward Bound offering to young people. **When fully utilised the Ogwen operation will enable us to work with an additional 1,000 young people every year.**
- In 2015 we designed, developed and launched our new 19-day Outward Bound Skills for Life Award. It is aimed at young people aged 15–19 with a view to providing them with skills and insights to help them make a successful transition into sixth form, further education or employment. The design of the course involved young people, parents, educationalists and employers; and together we created something of real relevance to help young people at a critical phase in their development. **Over the lifetime of this plan, we want over 1,000 young people each year to gain the Outward Bound Skills for Life Award.**
- In 2012 we made the decision to reflect increasing devolution in parts of the UK in the way we organise The Outward Bound Trust. A Scottish Director was appointed and a Scottish Advisory Council was created. The intent is to maximise our profile so as to develop new partnerships that will increase the number of young people from Scotland attending Outward Bound courses (especially but not exclusively at Loch Eil) and maximise our fundraising performance in Scotland. **During the lifetime of this plan, we intend to further develop the potential of Outward Bound in Scotland.**

# 3

## PRIORITY THREE BECOMING STRONGER

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The Outward Bound Trust is aiming to be bigger and better. To thrive it must also become stronger and address the challenge of scalability.

This is a very people-centric organisation and will remain so as we continue to embrace the benefits of technology. At the very heart of what we do is an instructor standing in front of a small group of young people inspiring them to have an adventure and to learn from it. At the very heart of what we do is our ability to earn the trust of those who send young people to us and the relationship we build with those who fund it.

Therefore the challenge of scalability is all about the recruitment, retention and development of the very best staff for all the different roles across the organisation and the creation of a working environment that enables everyone to give of their best.



## PRIORITY THREE BECOMING STRONGER

### DURING THE LIFETIME OF THIS STRATEGY WE WILL:

- Ensure that all new staff receive both an on-the-job induction and a Trust wide induction
- Re-launch the Walk in My Shoes initiative, which enables any staff member to spend time shadowing and learning from staff doing a very different job within the organisation
- Put 32 high achieving members of staff annually from right across the organisation through our powerful “Outward Bound, Leadership and Me” programme run in conjunction with the Coverdale organisation
- Develop our own modular management training programme that will be attended by all managers and open to aspirant managers
- Proactively develop links with our sister organisations in the 32 different countries where Outward Bound is now licensed so that staff get the opportunity to learn from, and contribute to, the development of Outward Bound world-wide
- Invest in job specific succession planning so that more members of the All Managers’ Group are appointed from within when a vacancy arises



**PROACTIVELY  
DEVELOP LINKS  
WITH OUR SISTER  
ORGANISATIONS  
IN 32 DIFFERENT  
COUNTRIES**

In addition our six “Ways of Working Together” was constructed after consultation with over 130 staff. This summarises the culture we aspire to create within the organisation and is important because of the high level of mutual dependency that exists among all the different roles within The Trust.

During the lifetime of this strategy, we will recognise and celebrate those staff members who go the extra mile to embed this culture within the organisation.

# WORKING TOGETHER ACROSS THE TRUST

This, we believe, is the way that we should work together within The Trust. This is the culture that we want all employees – from the CEO to the rawest new recruit – to play their part in developing:

- 1 WE ARE PROUD TO WORK FOR THE OUTWARD BOUND TRUST**  
It is our responsibility to come to work each day determined to make it even better.
- 2 WE ARE A SMALL ORGANISATION WITH SOME VERY TALENTED AND DEEPLY COMMITTED STAFF**  
Although line management responsibilities and areas of ultimate responsibility are clear, we aim to be as non-hierarchical as possible. Constructive advice, comment or guidance from anyone to anyone is more than welcome.
- 3 WE TRUST ONE ANOTHER TO DO THE JOBS WE HAVE BEEN RECRUITED, TRAINED AND DEVELOPED TO DO**  
Each of us taking personal responsibility lies at the heart of a great team performance. No-one should need or want to be micro-managed.
- 4 EVERYONE CAN BE A LEADER**  
Because everyone can influence what we do and what is happening. Giving and receiving support and challenging feedback, clarifying purpose, active listening and providing constructive suggestions are all examples of how any one of us can exert influence at any time.
- 5 WE SHOULD ALL LOOK FOR WAYS TO PRAISE EACH OTHER**  
For the many things that we do well. In doing so we also earn the right to confront behaviour or performance which is unacceptable or which saps energy from the organisation.
- 6 THE MORE EFFECTIVELY WE COMMUNICATE WITH EACH OTHER, THE BETTER THINGS WILL BE**





# THREE AREAS OF EXPERIMENTATION BECOMING BOLDER

The Outward Bound Trust was established 75 years ago. For an organisation to thrive for three-quarters of a century, it must have the ability to challenge itself, to innovate and to change.

Over the lifetime of this strategy, we want to experiment in and examine three particular areas, and explore what we might choose to do differently. If adventure means being bold enough to undertake a journey with an uncertain outcome, then we should not shy away from exploring new ideas even if we are not yet certain where exactly they will lead.



# THREE AREAS OF EXPERIMENTATION BECOMING BOLDER



1

## USING OUR EVALUATION, EXTERNAL RESEARCH AND INNOVATION TO MORE DIRECTLY INFORM OUR PRACTICE

In 2007 we established an Evaluation team tasked with developing our ability to measure the specific learning outcomes we achieve with young people. Our biennial Social Impact Reports are testimony to how effective and credible we have become at doing this. We have never been better at evidencing the benefit of an Outward Bound experience on the lives of young people.

However, we have not yet challenged ourselves sufficiently to consider how we might evolve the way we design and deliver our courses as a result of the evaluation evidence we accumulate; nor have we adequately considered how our practice is influenced by external research and developments in educational practice. In addition, there is more we should do to promote innovative course design, specifically in relation to the use of technology. Doing all three in a more deliberate way will be our first area of experimentation.

2

## MORE TARGETED PARTICIPATION

We have not yet challenged ourselves sufficiently to consider whether we should work more with those who need us most and have the most to benefit from participating in an Outward Bound course. Unpacking this simple concept, and seeing what changes might result, will be our second area of experimentation.

3

## A MORE DIVERSE WORKFORCE

We are proud of the fact that any young person, regardless of his or her background or personal circumstances, can benefit from participating in an Outward Bound course. Fundamentally we will always seek to work with young people from as diverse a range of backgrounds as possible. To be more effective at doing this in practice, we will take the first steps towards the creation of an instructional team that more closely represents the backgrounds of the young people who attend our courses.

# AVOIDING AMBIGUITY

There is much we do currently which we will keep doing over the next few years. These activities give us focus and clarity and they resonate well with both our values and our strategic goals.

There are also a number of things that we have considered but have decided we will NOT do. A strategy involves making choices and these otherwise commendable ideas are simply not a priority for the foreseeable future.



JOHN  
MUIR  
AWARD

## WE WILL NOT

- ✗ Run courses and programmes overseas
- ✗ Run activity programmes aimed at making people better climbers, canoeists or sailors
- ✗ Work with young people with aggressive or addicted behaviours, or develop programmes where we do not have the skills or resources to deliver high quality outcomes in a safe environment
- ✗ Campaign to influence government policy



## WE WILL CONTINUE TO:

- ✓ Concentrate on impact and sustainability, the twin pillars of our work over the last decade
- ✓ Focus on just three “business streams” – our work with schools and colleges, our work with apprentices and graduates and our work with individuals
- ✓ Work closely with our partners to deliver outcomes tailored to the specific needs of each group of participants
- ✓ Be sensitive to our operational impact on the beautiful surroundings that form the backdrop to our work; we will continue to measure our carbon footprint and to introduce measures to minimise this
- ✓ Work in partnership with the John Muir Trust to deliver the John Muir Award and make environmental sensitivity part of the “wallpaper” of every Outward Bound course
- ✓ Invest in evaluation



# WHAT SUCCESS LOOKS LIKE OUR 2020 TARGETS

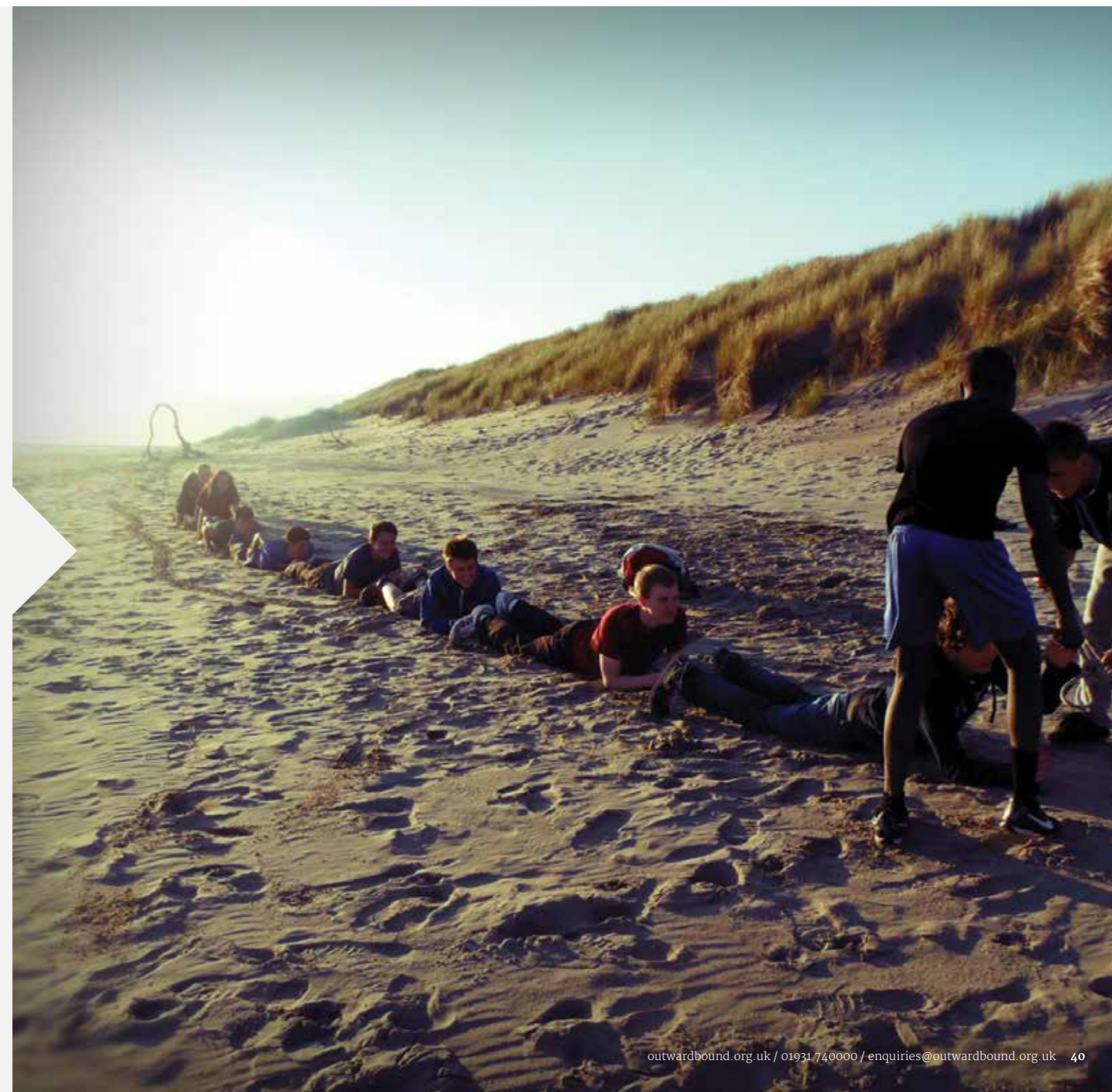
The focus of our strategy is to keep growth and consolidation in balance and to ensure we have a staff team that can achieve both these priorities in parallel. We can become bigger and we can become better if we also become stronger.

The Board of Trustees approve the annual business objectives and budget for the charity. Progress against these and the wider initiatives contained in this strategy are reported on quarterly by the Senior Management Team to the Trustees and also form part of the ISO 9001 external audit. The annual budget sits within a three year rolling budget, enabling adjustments to be made if required.



# OUR HEADLINE STRATEGIC TARGETS FOR 2020 ARE:

- To work with 30,000 young people a year across all our centres (24,000 in 2015)
- To award The Outward Bound Skills for Life Award annually to >1000 young people (291 in 2015)
- To raise £5million of bursary money each year to ensure that financial disadvantage is not a barrier to attending an Outward Bound course (£4 million in 2015)
- To acquire a new residential centre of a size and scale which when fully utilised will give us the capacity to work with an additional 7,000 young people per year
- To raise the money to acquire and develop this new centre
- To develop the new Ogwen Cottage centre in partnership with the National Trust, thereby giving us the capacity to work with an additional 1,000 young people a year
- To deliver all courses across all our centres with consistently higher levels of adventure and learning – as evidenced both through our formal evaluation work and beneficiary/customer feedback
- To raise and spend £2 million on the redevelopment of our Loch Eil centre
- To have generated a General Fund surplus of >£350k for each year of this strategy and hold unrestricted reserves >£2 million
- To strengthen the brand so that young people, teachers, employers, donors and all potential supporters are informed of, and inspired by, the positive impact we have on the lives of young people
- To run a pilot programme to target those who would ordinarily never consider a career in outdoor education, and which will support them in the sector
- To invest time and energy discovering the implications and potential actions arising from the areas of experimentation identified in this strategy
- To maintain our ISO 9001 certification and invest in a new IT system
- To develop a staff team able to thrive within a bigger organisation with the following features – regular management training; an annual Outward Bound leadership course for our highest performing staff; the introduction of an award recognising those who do most to contribute to our agreed Ways of Working Together; and regular and structured opportunities to contribute to, and learn from, the many Outward Bound schools across the globe.



WORK WITH  
**30,000**

YOUNG PEOPLE A YEAR  
ACROSS ALL OUR CENTRES

**AWARD**

THE OUTWARD BOUND SKILLS  
FOR LIFE AWARD ANNUALLY TO

**1,000**

YOUNG PEOPLE

**RAISE**

**£5 MILLION**

OF BURSARY MONEY

EACH YEAR TO ENSURE THAT  
FINANCIAL DISADVANTAGE IS  
NOT A BARRIER TO ATTENDING  
AN OUTWARD BOUND COURSE



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Howtown, The Lake District, England

Ullswater, The Lake District, England

Loch Eil, The Highlands, Scotland

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**THE  
OUTWARD  
BOUND TRUST**