



OUTWARD BOUND®
INTERNATIONAL

LICENSING REQUIREMENTS AND GUIDANCE TO ESTABLISHING AN OUTWARD BOUND SCHOOL

2021





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OVERVIEW OF OUTWARD BOUND LICENSING

Outward Bound International is responsible for the licensing of Outward Bound Schools around the world. Only licensed Schools may use the word mark “Outward Bound” and the associated “compass rose” icon. Licensed Schools are members of the Outward Bound Council, have access to Outward Bound’s intellectual property and our distinctive People, Place and Process model for authentic learning and adventure.

Outward Bound licenses are only granted where the primary aim is to serve the people of the licensed territory, particularly young people. An Outward Bound school at all stages of its development is required to operate as a not-for-profit organization, not a business. The Outward Bound brand must not be used to provide ancillary support to other commercial activities, attract inbound tourists or to serve primarily corporate clients. Any surplus generated from Outward Bound activities (profits) must be returned to the organization to further its interests and not to the organization’s supporters, board members, or employees. Outward Bound schools do not have shareholders or owners.

Typically, an Outward Bound license granted to a school becomes the responsibility of the school’s Board of Directors. The governance of an Outward Bound school is through a board of prominent people who have the interests of the country and its people at heart. One of the key tasks of starting an Outward Bound School is recruiting and motivating such people. Details of our governance model (against

which applicants are measured) can be found at www.outwardbound.net/wp-content/uploads/2020/12/OBI_document_A4_email.pdf

Start-Up Costs and Membership Dues

Applicants should be aware that access to the Outward Bound brand, intellectual property and membership within the international Outward Bound network has some costs. Expect to pay startup fees of at least US\$5,000, plus additional annual expenses of sending staff to attend annual conferences and symposiums in different parts of the world. Membership fees, dictated by turnover, are payable each year by all licensed Schools.

As part of the start-up costs, you should also be aware that you will be required to cover OBI’s costs in relation to trademark registration (by OBI’s trademark lawyers) in your country. This is done on an “at cost basis”. Full details including a cost estimate (costs vary from country to country) will be provided as part

of the licensing review and full payment is expected before the Exploratory Status is awarded.

Every licensed School is obliged to participate in a periodic review process to inform Outward Bound International of its organizational risk management capacity and quality of programs delivered. Full Licensed schools are reviewed once every two years whilst Provisional Licensed schools typically undergo an annual review prior to meeting the full license criteria.

It is a requirement of the licensing process that Schools bear the costs of these Reviews (until such time as a Full License is awarded). Many useful ideas can be gained from these exchanges with senior staff of established Outward Bound schools, however the review costs (typically US\$4-5,000) are the responsibility of the school being reviewed.

Typically, an applicant may progress from initial application to Full License in 3-5 years. In some cases, a longer time is needed.



ABOUT OUTWARD BOUND INTERNATIONAL

Outward Bound International is the membership and support organization of the international network of Outward Bound schools. You can find out more about Outward Bound International [here](#).

MISSION

We enable our member Schools to be more effective and more resilient and we promote and protect the name and trademark “**Outward Bound**”.

VISION

- An effective worldwide network of high performing Outward Bound Schools.
- Outward Bound Schools that increasingly make a real difference to the lives of participants through adventure and learning in the natural environment.

OUR GOVERNANCE

A Council, made up of representatives from each fully licensed member School, governs Outward Bound International. The Council appoints the Board of Directors. You can find out more about our governance, and review the OBI Board of Directors, [here](#).

OUR VALUES

Adventurous Learning

A belief in the power and intensity of learning through adventure in the outdoors - as a means of bringing out the best in our participants.

Transformational Change

A deep appreciation of the balance between risk, reward and responsibility. We facilitate authentic learning through purposeful and intense experiences with real consequences and powerful, positive and memorable outcomes.

Respect and Compassion.

Our Schools aim to stretch people both physically and mentally. In doing so they act with care, concern and generosity towards people and the natural environment.

You can view our **Strategic Plan** [here](#).



THE EDUCATIONAL EXPERIENCE: *WHAT IT MEANS TO BE OUTWARD BOUND*

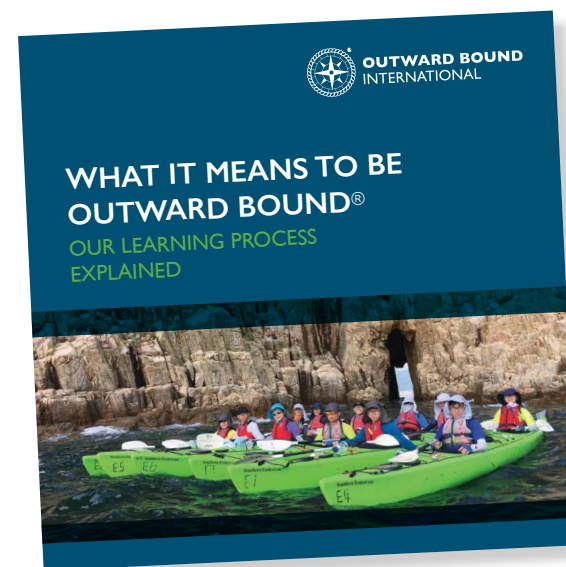
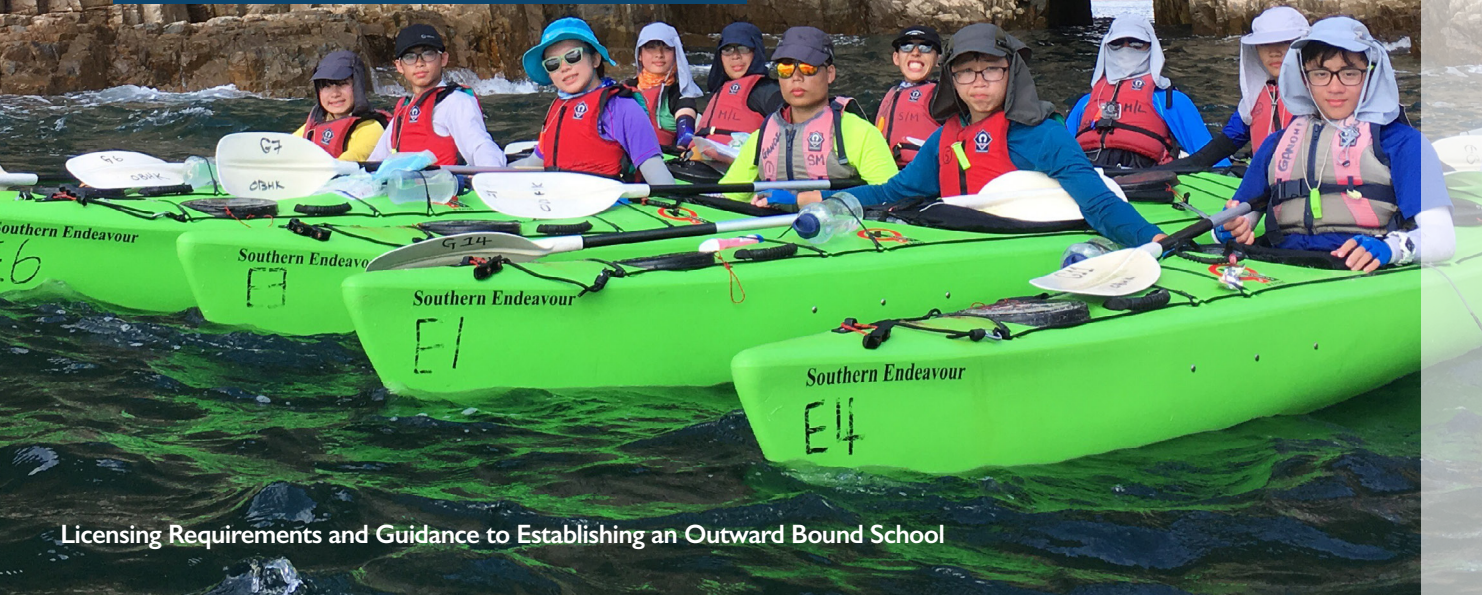
OUR BELIEF:



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 else.



Kurt Hahn, co-founder of Outward Bound.



Our learning process is explained in the “**What it Means to be Outward Bound**” document that can be accessed [here](#).

We will only award licenses to applicants who are committed to delivering the type of programs described above to predominantly young people.

WHAT DOES IT TAKE TO ESTABLISH A NEW OB SCHOOL?

All new Outward Bound Schools are different. There is considerable diversity in the needs that individual Schools have in startup. The following indicators should help guide you through the key decisions and stages required:



- 1 Understand the philosophy** of the Outward Bound educational model, its aims, objectives and core operating principles.
- 2 Identify a clear social need** for Outward Bound in your territory (note that OBI usually only grants one license per country).
- 3 Confirm that the economic and legal conditions** in the chosen territory can support a not for profit organization.
- 4 Make contact with regional Outward Bound Schools.** Examine their operating model and target client markets. You are likely to find similarly operating principles (and constraints!) that may apply to your territory.
- 5 A Board that understands Outward Bound** and who are committed to establishing the School is critical.
- 6 A competent management team**, led by a full-time Executive Director, who is experienced in the operations of an Outward Bound, school is essential.
- 7 Identifying a primary target market** for youth programs and sustainable funding / fee model is critical. Have a clear plan to support those who can't afford to cover costs (if applicable).
- 8 Ensure that you have adequate funding** for startup and operational contingencies. Additional funds may be raised over time, but you must not underestimate the time and resources it takes to sustain operations.
- 9 Operating in countries with a low GDP** makes paying for the Outward Bound service particularly challenging. Startups in such countries are especially vulnerable to loss of a key funding source or leader.
- 10 OBI will appoint a “Mentor School”** that can provide advice, support and guidance. They may also be able to support in staff recruitment and training (for which reasonable fees may need to be paid). A mentor school is selected to be a close fit for your proposed operating model.
- 11 It is important that business plans and financial projections are realistic and achievable.** OBI will measure you against our licensing objectives and the application that you submit. Radical changes to the application, associated operating model or business plan may result in the need to submit a new application.
- 12 Applicants often devote too much time to program design** at the expense of sound marketing, sales and business strategy.
- 13 Finally, keep your operating model simple, work closely with your Mentor School and keep in regular contact with OBI. Ask for help when you experience difficulties!**



THE LICENSING PROCESS

Outward Bound International (OBI) implements a four-stage licensing process designed to help applicants develop appropriate plans to succeed in their country.



STAGE 1 →

Initial Inquiry and Application

If an Outward Bound licensee already exists in a country then inquiries for service should be directed to that licensee whose contact information may be found at www.outwardbound.net. Otherwise, serious inquiries should be directed to OBI

- a) The applicant undertakes research to establish the need, feasibility and support for pursuing Outward Bound licensing
- b) A letter of interest, outlining your plans, is submitted (please note that the award of a Full License will, in part, be based on your achieving the objectives outlined in this letter and in your subsequent formal application).

STAGE 2 →

Exploratory Status (fees payable – USD\$5,000; expires in 12 months unless renewed)

- a) Having gained the support of OBI and, after establishing that there is sufficient interest and potential resources to provide Outward Bound services in a particular territory, the applicant should submit a formal application. Insert link to form
- b) OBI will review the application and the applicant. If OBI staff are satisfied that the application has merit, the applicant will be invited to make a presentation to the OBI Operations Committee.
- c) If the Operations Committee are prepared to endorse the application, a recommendation will be made to the Board of OBI that Exploratory Status be granted.
- d) OBI will authorize the formation of an Outward Bound Exploratory Committee by the applicant. This is OBI's formal permission to allow an interested group

to explore the viability of operations in their country. The Outward Bound Exploratory Committee may only explore marketing and fund raising potential of Outward Bound in their country. At this stage there is no license to operate programs using the Outward Bound name.

e) Payment of a US\$5,000 fee is required before Exploratory Status is granted to cover OBI costs of consulting on program development. As outlined earlier, you will also be required to cover OBI's costs in relation to the Trademark registration in your country. Exploratory Status allows the Party to use the Outward Bound name only on stationary, marketing and fund raising materials for a period of one year. An extension for a further year may be considered at the discretion of the OBI Board.

f) You will also be required to cover the costs of an OBI visit to meet with you (before Exploratory Status is granted).



STAGE 3 →

Provisional License (fees payable USD\$5000 per year; expires in 3 years; commitment to annual reviews)

The application for Provisional License to commence operations (i.e. conduct OB branded programs) follows the process below:

1. A successful program review by the Executive Director (or his delegate)
2. Written support by the Mentor School
3. Review of application for Provisional License and recommendation by the OBI Operations Committee
4. Endorsement of the provisional license application for the territory by OBI Board of Directors
5. Approval of the provisional license application by the Council (typically at the OBI AGM)
6. Payment of all fees is up to date.



Provisional Licensing (meaning permission to conduct OB branded programs) is given by the OBI Board of Directors following a recommendation from the Operations Committee and the Executive Director. The Council at the Annual General Meeting must also approve this provisional licensing.

This is a temporary License for a maximum of three years. A Provisional License permits the limited operation of Outward Bound courses. It may be revoked at any time by OBI.

A school is granted a Provisional License on the basis that all of the following conditions are fulfilled (failing which, the license may be revoked).

Each Applicant receiving a Provisional License to operate under the Outward Bound name must:

- Have a board of representative and influential persons to provide guidance, vision, enthusiasm and resources.
- Have sufficient startup funding to cover not only start-up operations but also the licensing fee and trademark registration.
- Maintain and promote the Outward Bound philosophy based on the concepts of Kurt Hahn and follow the spirit of the international mission statement.
- Have a business plan that demonstrates a sound business base with a reasonable prospect for financial viability.
- Have nonprofit status (or equivalent).

- Have solid financial control systems.
- Hire staff with sufficient Outward Bound experience to guide the educational aims and run operations of the school. This may include an experienced Outward Bound staff member from an established school.
- Develop systems to assure skilled and competent staff with experience of Outward Bound program delivery and philosophy are available to support delivery.
- Provide OBI with details of all programs you planned to deliver (including dates and venues)
- Invite OBI to undertake a Review of the School and cover all associated costs at least once per annum.
- Develop plans for safety and quality of programs including standard operating procedures, policies and guidance documents.
- Begin the process of publishing curricula for all courses in an instructor manual.
- Place a strong emphasis on programs for youth of the country.
- Be open to anyone, regardless of race, religion, color, physical or mental ability, social or educational background.
- Have a plan to be able to provide financial assistance to persons wishing to attend courses but who are unable to afford the fees.



- Have adequate general liability insurance and name OBI as co-insured for any activities within the country.
- Agree to comply the OBI Territorial Protocols
- Agree to follow the OBI Guide to Good Governance and Risk Management Protocols.
- Reimburse OBI promptly for all legal expenses incurred in relation to Trademark registration.
- Review and agree to the license terms of the OBI license including:
 - Not to register Outward Bound trademark (this is done by OBI)
 - Not to make commercial use of Outward Bound name
 - Act effectively against infringements of Outward Bound name in the territory
 - Communicate with OBI in a timely manner
 - Pay dues promptly
 - Participate in international meetings
 - Not to assign license to others without OBI permission

Once the OBI Board is satisfied that the new exploratory committee has sufficiently satisfied the Provisional Licensing Checklist and the necessary fees (including an at least an additional US\$5,000 and whatever legal expenses incurred) have been paid, they will approve Provisional Licensing. The Council at the Annual General Meeting must also approve this provisional licensing.

STAGE 3 →

Full License (annual membership fees payable USD\$3500 or higher; commitment to biennial reviews;)

After the three-year trial period, if viable operations have been attained to the satisfaction of the OBI Executive Director and the Operations Committee, a School becomes a licensed member of OBI. These are the stipulations for becoming a Licensed Member:

1. The school has successfully and safely operated courses within the mission of Outward Bound
2. Remained solvent and has developed ongoing business plans.
3. The school has fulfilled its obligations to operate consistently under the terms and conditions of above mentioned provisional license criteria.
4. OBI has completed satisfactory on-site Safety and Quality Reviews (the expenses of which are to be met by the Provisional Outward Bound School).



The award of a Full Outward Bound License follows the process below:

1. A successful program review by the Executive Director (or delegate)
2. Written support by the Mentor School
3. Review of application for full license and recommendation by the OBI Operations Committee
4. Endorsement of the full license application for the territory by OBI Board of Directors
5. Approval of the full license application by the Council typically at the OBI AGM
6. Award of License by Outward Bound Global



GUIDANCE TO HELP PROGRESS FROM EXPLORATORY STATUS TO PROVISIONAL LICENSE

Setting up the Organization

1. Seek consultant support from OBI resources including the appointed Mentor School.
2. Design organizational structure: Name? Trustees? Advisory Board? Draft by-laws as a non-profit corporation.
3. Agree on roles and responsibilities of Board members.
4. Set up Board member task groups.
5. Create a business plan to project fiscal feasibility, initial capital costs, start-up of marketing and operational costs of first year, management structure, size of operation, size of core staff and staffing criteria, salaries, tuition level, bursary fund needs, fund-raising goals, and fiscal control systems.
6. Create a profile of the Executive Director.
7. Identify an Executive Director and fund a visit to an established Outward Bound School with the task of recommending a plan of implementation.
8. Raise funds to support start up salaries.

Implementation

1. Director sets up administrative and business structure, reviews and revises original business plan.
2. Fund-raising initiated.
3. Detailed program planning get consultant help if necessary, staff selection and training, area reconnaissance, site selection program design, syllabus and staff handbook, safety policies and procedures, interface with outside agencies.
4. Marketing material produced: brochures, direct mail pieces, Web site, public information, recruiting, etc.
5. Liability and insurance provisions.
6. Emergency/contingency planning.
7. ***What should the business plan include?***
(See next page).



THE PROVISIONAL LICENSE


Provisional Licensing to begin operations occurs through a vote of the Council at an AGM after a recommendation from the Board of Directors. This is a temporary agreement of approximately three years. Provisional Status permits the operation of Outward Bound courses.



Each School receiving a Provisional License to operate under the Outward Bound name must:

- Have a volunteer board of representative and influential persons to provide guidance, vision, enthusiasm and resources.
- Have sufficient startup funding to cover not only start-up operations but also the licensing fee and trademark registration. The OBI Board, on a case-by-case basis, will designate the amount of start-up operational funding.
- Maintain and promote the Outward Bound philosophy based on the concepts of Kurt Hahn and follow the spirit of the international mission statement.
- Have a business plan that demonstrates a sound business base with a reasonable prospect for financial viability. See appendices C & F.
- Have non-profit status (or equivalent).
- Have solid financial control systems.
- Hire staff with sufficient Outward Bound experience
- to guide the educational aims and run operations of the school. This may include an experienced Outward Bound staff member from an established school.
- Have systems to assure skilled staff is available.
- Develop operational plans for safety and quality of programs.
- Begin the process of publishing curricula for all courses in an instructor manual.
- Place a strong emphasis on programs for youth of the country.
- Be open to anyone, regardless of race, religion, color, physical or mental ability, social or educational background.
- Have a plan to be able to provide financial assistance to persons wishing to attend courses but who are unable to afford the fees.
- Have adequate general liability insurance and name OBI as co-insured for any activities within the country.
- Agree to follow the OBI Territorial Protocols
- Agree to follow the OBI Organization and Risk Management Protocols.
- Agree to use a law firm selected by OBI for licensing and trademark matters.
- Reimburse OBI promptly for all legal expenses incurred on their behalf.
- Review and agree to the license terms of OBI standard license including:
 - Not to register Outward Bound trademark except in own country
 - Not to make commercial use of Outward Bound name
 - Act effectively against infringements of Outward Bound name
 - Communicate with OBI in a timely manner
 - Pay dues promptly
 - Participate in international meetings
 - Not to assign license to others without OBI permission





Once the OBI Board is satisfied that the new exploratory committee has sufficiently satisfied Provisional Licensing Checklist and the necessary fees (including an at least an additional US\$5,000 and whatever legal expenses incurred) have been paid, they will approve provisional licensing. The Council at the Annual General Meeting must also approve this provisional licensing.

THE FULL LICENSE

After the three-year trial period, if viable operations have been attained, a Center becomes a licensed member of OBI. These are the stipulations for becoming a Licensed Member:

- 1** The school has successfully and safely operated courses within the mission of Outward Bound
- 2** Remained solvent and has developed ongoing business plans.
- 3** OBI has completed satisfactory on-site Program, Safety and Quality Reviews (the expenses of which are to be met by the provisional Outward Bound Center).



These criteria are quite broad and qualitative. More specific criteria that will be assessed in the safety and quality reviews conducted by Outward Bound International include:

- The School has paid the requisite licensing fees, the legal costs of registering the Trademark and any other start-up costs attributable to OBI.
- Established a legally constituted, not-for-profit organization governed by an independent Board of respected persons.
- Executed a license agreement in relation to the use of the Outward Bound Trademark, name and logo.
- Becoming a participating member of OBI by paying membership dues, attending Annual General Meetings and Conferences and otherwise participating in OBI.
- Demonstrated a sound business base and a reasonable prospect of financial viability.
- Not being subject to any influence or degree of control that could or would inhibit its freedom to implement the mission of Outward Bound.
- Hired staff with sufficient Outward Bound experience to guide the educational aims and run operations of the school.
- Have systems to assure skilled staff is available.
- Places a strong emphasis on programs for young people.
- Is open to all people regardless of race, religion,

color, physical or mental strength, social or educational background.

- Has the ability and intent to maintain and promote the Outward Bound philosophy based on the concepts of Kurt Hahn and following the spirit of the international mission statement.
- Have the resources to implement financial assistance to needy persons wishing to attend.
- Implements the Organization and Risk Management Protocols.
- Observes the Territorial and Marketing Protocols.
- The governing body meets on a regular basis and provides effective oversight.
- Marketing plans and materials are sent to OBI.
- Appropriate insurances coverage is in place, including general liability insurance of a realistic amount. Where possible OBI must be named as coinsured.
- Has published curricula for all courses.
- Status reports and audited accounts sent to OBI annually.
- Have financial control systems approved by a professional auditor.
- Maintained regular communications with any mentoring Outward Bound.



APPENDIX 1 OUTLINE BUSINESS PLAN

The following suggests the basic outline for a business plan. It is not necessary to follow the format provided, it is only offered as a guide.

1. Executive Summary:

This is the most critical part of the business plan for investors and people who fund your start-up costs. This is where people gain their first impression of the organization, founding team and the concepts that underlie the venture. It should include:

- Background on Outward Bound and what the need is for Outward Bound in your territory.
- A description of the school's mission and anticipated outcomes.
- Background on the founders of the school.
- The legal framework of the school.
- The educational products to be offered and what they will provide to the students/clients.
- The market and competition for experiential education and/or professional development in your territory.
- Details of any community support and/or partners.
- A summary of the financial data and plan of operations.
- The amount of initial money needed to start the organization.

2. The School and its Services:

This section is designed to introduce Outward Bound to people who do not know its services. It also describes the current status of the organization, what niche the school fills within the specified territory, it's strategic plan for the future and the staff/board members who will be involved in the project. Some key areas to focus on:

- Mission and Philosophy
- The Services/Products to be offered (type of program operations-mobile/base camp, age groups, course types, etc.)
- Market entry strategy, expected market reaction, growth strategy, barriers to entry and growth.
- Partnerships and Community relationships.

3. Analysis of the Market:

This section is designed to introduce Outward Bound to people who do not know its services. It also describes the current status of the organization, what niche the school fills within the specified territory, it's strategic plan for the future and the staff/board members who will be involved in the project.

Some key areas to focus on:

- Mission and Philosophy
- The Services/Products to be offered (type of program operations-mobile/base camp, age groups, course types, etc.)
- Market entry strategy, expected market reaction, growth strategy, barriers to entry and growth.
- Partnerships and Community relationships.

4. Sales and Marketing

This section is designed to introduce Outward Bound to people who do not know its services. It also describes the current status of the organization, what niche the school fills within the specified territory, it's strategic plan for the future and the staff/board members who will be involved in the project. Some key areas to focus on:

- Mission and Philosophy
- The Services/Products to be offered (type of program operations-mobile/base camp, age groups, course types, etc.)
- Market entry strategy, expected market reaction, growth strategy, barriers to entry and growth.
- Partnerships and Community relationships.



5. Funding

- As a not-for profit entity describe the funding structure and resource development strategy of the organization. This should include:
- Seed money for start up operational costs
- Fund raising plan for capital investments and other long term needs
- Funding plans for scholarships
- Continuous Operations funding strategy

6. Financial Management:

This section includes all of the financial estimates and needs for the organization over the first three years. It should include:

- An explanation of the source and amount of initial capital.
- An operating budget for the first year.
- A monthly cash flow for the first year.
- Projected balance sheets for a two-year period.
- •Discussion on the break-even point.
- Discussion on who will maintain the accounting records and how they will be kept.
- “What if” statements that address alternative approaches to any problems that may develop.

7. Operations:

This section should describe in detail the operations and governance plans for the organization. It should include:

Infrastructure:

- A description of the location and proposed facilities
- The program types and duration
- Discussion of insurance, lease or rent proposals
- Identification of the equipment necessary to safely deliver the promised services

The Management Team Structure:

- An explanation of the management structure and how it will be managed on a day-to-day basis
- Discussion on hiring, training and other relevant personnel strategies

Organization Structure:

- Identification of evaluation and assessment strategies for staff, programs and organization.
- Risk management structure

Governance Strategies

- Who is on the board and why
- How the board will operate

8. Concluding statement

- Summarize the school's educational goals and objectives.
- Describe the credentials of the board members
- Summarize pledged financial and resource support

9. Appendices:

These should include any relevant data that would help OBI and potential investors/funders make more informed decisions:

- Resumés of Founding Team members
- Implementation timeline
- Market research
- Maps of the territories in which the school will operate



APPENDIX 2 SOURCES OF INCOME AND REVENUE

As you develop your Outward Bound plans you will need to include information about where and how you will derive revenue (income). This is a key part of your application and underpins the sustainability of any start up School. You may find the following observations helpful:

- Almost all School in the Outward Bound network report that financial operating conditions are difficult. It is increasingly challenging to deliver a balanced budget as clients cut back on the amount they are prepared to spend and it costs more and more to operate Schools.
- The most “successful” Schools (delivering high quality programs in a sustainable way) have resilient business models that reduce their exposure to risk (i.e. a diverse customer base with limited exposure to risk should a client choose to terminate the relationship).
- Ideally, they will also have built up some reserves that at least give some thinking time in the event of a financial crisis.

Typically, there are only four sources of income available to Schools:

1. Income from program fees (the money that your participants are prepared to spend to attend your programs)
2. Funds from government or charitable sources in the form of grants or subsidies
3. Fundraising income (donations that support core OB work)
4. Income from other (non-Outward Bound activities) activities that generate a surplus that can be used to support core Outward Bound work. The most successful Outward Bound Schools will have a spread of all of these income sources.

Of course, each income sources can have both advantages and disadvantages:

Type 1 income is often considered to be the best model for cost recovery. You control it and you set the fee level in discussion with your customers. The challenge, of course, is that high quality programs are expensive to deliver, and often customers cannot meet the full cost of programs. This means you need some type 2, 3, or 4 income to balance your budget.

Type 2 income stream can be very good but it is also potentially high risk if it is the sole source of income. It is very easy to become overly dependant on grant income or government funding, leading to complacency and lack of innovation and flexibility. Governments change priorities and grants are often time-limited. “Good Schools” use type 2 income to support the budget and to build capacity — so that they are stronger and more diverse when the funding dries up. Schools that become over-dependent on type 2 funding, without fallback plans for when the funding comes to an end (and it always does) can find themselves in real crisis — usually with staffing levels and program models that are impossible to sustain.



Type 3 income is usually only achieved when you can demonstrate the value that you bring to your community and can make a compelling case for support. Don't underestimate how difficult fundraising is for everyone; without commitment, investment and a good strategic plan it is indeed difficult. However, it need not be unattainable. Donors rarely approach Schools and offer support. Hard work, committed staff, diligent research, and a good offering are what produce donations. Don't overlook this very valuable income and don't write it off. Money from fundraising can make a real difference to your School's operation.

Be careful of type 4 income!

It is very easy to be seduced into believing that services you deliver that are a long way from your “core Outward Bound mission” are worthwhile because they are profitable.

Experiences shows that it is easy for the whole OB operation to become overly focussed on the profitable (non-OB) work, resulting in neglect of the core OB mission.

All too easily, the subsidiary purpose can become the core and can drive the business model away.





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