



# **OUTWARD BOUND CALIFORNIA**

## **STRATEGIC PLAN EXECUTIVE SUMMARY** Outward Bound California

2022

PREPARED IN COLLABORATION WITH:



**BLOOM**  
ASPIRE | GROW | ACHIEVE

BLOOMPLANNING.COM  
111 S. INDEPENDENCE MALL EAST • SUITE 800  
PHILADELPHIA, PA 19106  
267.225.8761

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## Outward Bound California (OBCA) Vision for Impact

By 2030, OBCA is sought after by individuals, schools, and nonprofits as a trusted partner in delivering life-changing outdoor experiential education programs. Building upon Outward Bound's 60-year legacy in the U.S., we harness the inherent power of the natural environment to provide robust social-emotional learning opportunities for our students. In a supportive group environment, our skilled staff help students embrace physical and emotional challenges, find space for reflection, and cultivate skills like confidence and compassion that enable them to contribute to meaningful change in their communities and the world. We have evolved to center equity throughout our organization, and we increase access to the outdoors for groups who have been historically underrepresented, giving them a sense of inclusion and belonging in outdoor spaces.

### OBCA's future success relies on:

- **People & Culture.** We have an organizational culture of shared values where all students and staff feel a sense of safety and belonging and see themselves represented in the work we do. Our internal culture prioritizes staff development and equitable resources for all staff. Our staff and board are representative of the racial and ethnic demographics of the state of California, and we cultivate pathways to employment for people across identities.
- **Partnerships & Programs.** We deliver high-quality, culturally relevant educational experiences ranging from one-day to multiweek programs for youth and adults. We build inclusive partnerships with schools, nonprofits, land agencies, and funders that support students in attending multiple programs over their educational careers. We outreach to and collaborate with members of our community, including members of the Native communities on whose land we run our programs. This produces long-term impact for both the individuals and the organizations we work with.
- **Learning & Impact.** We are committed to learning and continuous improvement. We agree on our core outcomes and intended impact. As an active member of the Outward Bound learning community, we consistently use data to guide staff training and strengthen our program approach, while operating with the highest safety standards. We communicate our learnings and the impact of our work internally and externally with our peers and stakeholders.
- **Sustainability.** We leverage our strong history of safety and risk management practices to flexibly adapt and plan for the impacts of climate change on our people, programs, and facilities while actively collaborating with other organizations toward solutions. Our business model provides financial sustainability with a balance of fundraised and earned revenue. Our model allows us to offer competitive pay and benefits to our staff and provide opportunities for more students to thrive through their experience with OBCA.

## A. PURPOSE

For years, Outward Bound California (OBCA) has been delivering challenging outdoor adventure programs for people of all ages and walks of life. In the fall of 2021, with OBCA’s prior strategic plan ending and the country emerging from the COVID-19 pandemic, the time was ripe for a new strategic planning process. To set a clear vision for the future and ensure the long-term success of program staff and participants, OBCA initiated a strategic planning process in October 2021 and partnered with Bloom Planning, an education- and nonprofit-focused planning firm, to guide the work. Over the course of the following 10 months, the OBCA community engaged in a series of activities that culminated in the creation of a long-term vision for impact supported by key strategic planning initiatives and a detailed implementation roadmap.

## B. STRATEGIC PLANNING PROCESS

**WHAT IS A STRATEGIC PLAN?**

- A self-created roadmap to guide decisions, growth, and change and to help us realize our collective mission and vision for the future
- A process of stakeholder engagement yielding a set of carefully considered pathways and goals that bring our core priorities—staff, participants, and partners—into focus for the next three to five years
- A living document that will be revisited and revised on a regular basis

**A STRATEGIC PLAN IS NOT...**

- A tactical plan
- A static document
- Everything everyone wants nor everything the organization does

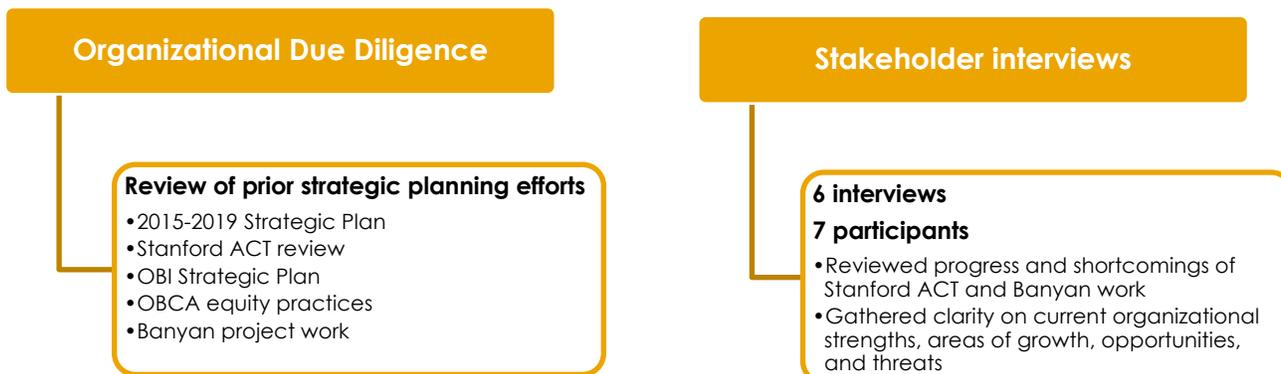
Outward Bound California developed this strategic plan using a five-phase planning process.

**Figure 1: Five Phases of OBCA’s Strategic Planning Process**



### Phase I: Discovery (October to November 2021)

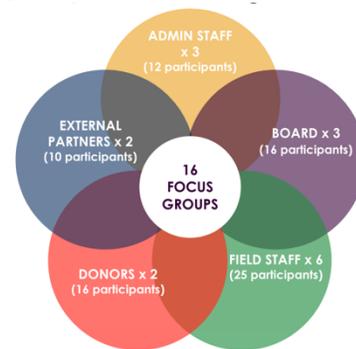
As the first step in this strategic planning process, the Bloom team conducted a series of research activities to inform the visioning and strategic initiative–setting process. Utilizing documentation from prior strategic planning efforts and direct interviews with staff and board leadership, Bloom had the opportunity to gather insights on OBCA’s organizational strengths and areas for development.



**Phase II: Visioning (November 2021 to February 2022)**

After validating OBCA’s current state and identifying organizational strengths, weaknesses, opportunities, and threats during the discovery phase, OBCA leadership created a draft vision for impact that identified OBCA’s framework of priorities for the next eight years. The draft was previewed and critiqued by 79 internal and external stakeholders in 16 focus groups in an effort to capture the perspectives and voices of those closest to OBCA’s work. OBCA leadership utilized the feedback to advance the creation of a long-term vision for impact for OBCA and the identification of four planning pathways.

**Figure 2: Focus Group Participation**



**Vision for Impact 2030**

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- **Sustainability.** We leverage our strong history of safety and risk management practices to flexibly adapt and plan for the impacts of climate change on our people, programs, and facilities while actively collaborating with other organizations toward solutions. Our business model provides financial sustainability with a balance of fundraised and earned revenue. Our model allows us to offer competitive pay and benefits to our staff and provide opportunities for more students to thrive through their experience with OBCA.

**Phase III: Detailed Planning (March to May 2022)**

The planning phase allowed for additional participation from 32 members of OBCA’s staff and board. Individuals were able to join one of four detailed planning teams, each focused on a planning pathway. Over the course of three meetings, teams used a series of gap analysis activities grounded in the discovery and visioning phase outputs to develop a statement of future intent and three to four strategic initiatives for each pathway as well as SMARTIE<sup>1</sup> objectives, metrics, annual milestones, and detailed Year 1 action plans for each initiative. Concurrent with the three planning meetings, Bloom worked with OBCA’s financial team to build and populate a multiyear *Financial Modeling Tool* designed to support organizational leadership in program, staff, and development decision making.

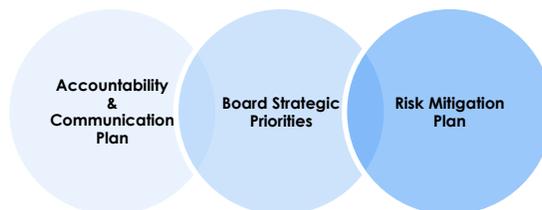
**Figure 3: OBCA’s Strategic Planning Framework**



**Phase IV: Accountability (June to July 2022)**

To ensure successful implementation of the detailed action plans produced in the planning phase of this process, Bloom worked with OBCA senior leadership and board members on a series of accountability activities including defining the metrics necessary to measure progress and creating accountability, communication, and risk mitigation plans. The board participated in a board function analysis and continues to refine their practices to support the strategic priorities. In addition, the rollout plan for the entire OBCA community to learn about the strategic plan prioritizes clear messaging, broad reach, and maintaining momentum.

**Figure 4: Accountability Plans & Tools**



**Phase V: Finalization (August 2022)**

This plan represents the culmination of OBCA’s robust strategic planning process. While it captures the plan at a point in time, the action plans that will achieve its goals will continue to evolve and grow with implementation and are captured in a separate *Implementation Tool*. This document includes a manipulatable metrics tracker and master action plan task list designed to be updated as work is completed.

**Figure 5: Implementation Tool Dashboard (Sample)**



<sup>1</sup> SMARTIE — Specific, Measurable, Attainable, Realistic, Time-bound, Inclusive, and Equitable

## C. PLANNING PATHWAYS

### Pathway 1: People & Culture

#### 5-YEAR STATEMENT OF FUTURE INTENT

By 2027, OBCA is dismantling systems of oppression within our organization and creating a culture of belonging for people across identities. We have a robust strategy in place to recruit, retain, and support staff across all levels of the organization whose identities reflect those of our students. Staff are in agreement with our organizational focus and are working toward our organizational goals. We make space for diverse perspectives and inclusive decision making. Staff stay connected to OBCA because they are excited by the work, they can advance in their careers, and they feel supported by OBCA’s intentional efforts to foster staff well-being.

#### STRATEGIC INITIATIVES

**1.1 Recruitment & Retention of Staff from Nondominant Identities**

**1.2 Organization-Wide Equity Initiatives**

**1.3 Board & Staff Relationship Building (Alignment)**

**1.4 Career Pathways**

#### 3-YEAR SMARTIE OBJECTIVES

<p><b>1.1 Recruitment &amp; Retention of Staff from Nondominant Identities</b></p>	<p>By 2025, OBCA has implemented key operational, cultural, and programmatic shifts geared toward increasing the interest of individuals from nondominant identities in careers at OBCA. These shifts are complemented by a robust recruitment plan that intentionally expands outreach into nontraditional spaces. As a result of this work, 40 percent of OBCA’s senior leadership staff, 50 percent of its administrative staff, and 50 percent of its field staff is from nondominant identities. OBCA balances a commitment to staff recruitment with a focus on retention, implementing a retention strategy that ensures the average tenure for all staff from nondominant identities will be five years and that the year-over-year return rate for field staff from nondominant identities mirrors the return rates for staff from dominant identities.</p>
<p><b>1.2 Organization-Wide Equity Initiatives</b></p>	<p>By 2025, OBCA has a robust structure to support all of our equity efforts. We have implemented an organization-wide plan for how equity is centered across the organization and within specific departments. This plan also clarifies how each staff role supports equity efforts. Our equity strategy includes an intentional approach for engaging board and field staff so everyone across the organization is equipped to develop and uphold organizational policies, programs, and partnerships with an equity lens.</p>
<p><b>1.3 Board &amp; Staff Relationship Building (Alignment)</b></p>	<p>By 2025, OBCA has implemented an alignment strategy that allows all internal stakeholders to have firsthand experience with OBCA programs and a general understanding of the operational and development processes of the organization. Additionally, the organization has implemented key practices that foster connection across the organizational hierarchy, particularly among field and program staff and board members.</p>
<p><b>1.4 Career Pathways</b></p>	<p>By 2025, OBCA has outlined and supports career pathways across the organization. One hundred percent of administrative and field staff are aware of these organization-wide career advancement opportunities. A career-pathways document details the competencies required for success across roles and outlines role-connected compensation and professional supports. Thus, staff are able to advance in their careers and are able to plan for their futures.</p>

## Pathway 2: Partnerships & Programs

### 5-YEAR STATEMENT OF FUTURE INTENT

By 2027, OBCA has year-round course options available across the Bay Area, Southern California, and High Sierra and a program approach that reflects California’s changing environmental conditions. We have increased the number of students we serve from BIPOC and LGBTQ+ communities across California, and we work with individual students through open enrollment and community-based programs through partnerships with public and private schools and nonprofits. Our students have a pathway to engage with the outdoors multiple times, receiving high-quality, culturally relevant curricula that offers healing-centered engagement and that honors the indigenous communities whose land we operate on. We intentionally develop trusting partnerships with organizations whose values are aligned with ours. These partnerships support us in understanding the social-emotional development needs of our students and in determining appropriate program depth.

### STRATEGIC INITIATIVES

**2.1 Climate Adaptable Programs**

**2.2 Program Model & Progression Pathways**

**2.3 Partnerships & Communities**

**2.4 Curriculum Development**

### 3-YEAR SMARTIE OBJECTIVES

<p><b>2.1 Climate Adaptable Programs</b></p>	<p>By 2025, OBCA has a climate action plan in place that allows for adaptations to our programs that respond to changing environmental conditions across all regions. The plan optimizes ideal programs that consider environmental conditions as well as academic school year demand. We develop relationships with land management agencies that allow for flexibility and ease of movement. We mitigate risk through updating the plan annually.</p>
<p><b>2.2 Program Model &amp; Progression Pathways</b></p>	<p>By 2025, OBCA has developed a financially sustainable program model that offers participants multiple opportunities to engage in OBCA programs that meet their needs, increases participation of BIPOC and LGBTQ+ students, and ensures quality programming.</p>
<p><b>2.3 Partnerships &amp; Communities</b></p>	<p>By 2025, OBCA has deepened our school, nonprofit, and community partnerships and expanded our outreach efforts to underrepresented and rural communities that may not have access to outdoor education programs while engaging communities—including indigenous communities—nearest our course areas.</p>
<p><b>2.4 Curriculum Development</b></p>	<p>By 2025, each OBCA course utilizes the Domains of Thriving (DoT) practices and curricula that are relevant, responsible, and responsive in addressing culture, equity, and climate.</p>

## Pathway 3: Learning & Impact

### 5-YEAR STATEMENT OF FUTURE INTENT

By 2027, OBCA has evidence of our programs' impact on students and their communities. We embody a learning mindset, and we responsibly implement accessible and culturally relevant evaluation systems to collect meaningful and actionable feedback from our students, staff, community partners, and families regarding their experiences with OBCA. This system of continuous improvement supports positive, impactful, and equitable outcomes for all students across all programs. Staff and external stakeholders alike understand the purpose and value of this information, and they are active collaborators in its collection and analysis. Our staff consistently use this feedback to make data-informed decisions regarding adjustments to staff trainings, program and curricular approach, funding, and organizational systems.

### STRATEGIC INITIATIVES

**3.1 Culture of Learning & Continuous Improvement**

**3.2 Communicating OBCA's Impact Story**

**3.3 Organizational Data Gathering & Reflection**

### 3-YEAR SMARTIE OBJECTIVES

<p><b>3.1 Culture of Learning &amp; Continuous Improvement</b></p>	<p>By 2025, OBCA exhibits a collective understanding of its culture of learning that connects staff's informal commitment to learning with formal data and evaluation practices. Through student outcome data collection and analysis, clear communication about how data is gathered and used, cadenced and regular feedback and evaluation, and professional development opportunities, a culture of learning is fostered so staff feel supported and inspired to deliver more impactful programs for Outward Bound students.</p>
<p><b>3.2 Communicating OBCA's Impact Story</b></p>	<p>By 2025, OBCA has a robust and organized collection of products, templates, figures, and storytelling tools (student quotes, data summaries, etc.) that are shared consistently and strategically to various audiences (e.g., donors, the broad community, partners, staff) and regularly updated with new data outcomes and visuals, so that all stakeholders have a clear and unified understanding of OBCA's impact.</p>
<p><b>3.3 Organizational Data Gathering &amp; Reflection</b></p>	<p>By 2026, OBCA has created a comprehensive plan detailing how student outcome data is collected, analyzed, evaluated, reported to stakeholders, and utilized to guide staff training and strengthen our program approach. All data is held in a central data repository and collected, analyzed, and distributed in a manner that takes bias into account.</p>

## Pathway 4: Sustainability

### 5-YEAR STATEMENT OF FUTURE INTENT

By 2027, OBCA is operating from a place of financial strength that allows us to be adaptable and resilient in the face of environmental, social, and economic changes. Our evolved funding model incorporates a balance of revenue sources and new funding, removes reliance on campaign and reserve funds, and increases our investments in staff, programs, facilities, and climate resilience and action. We have streamlined our expenses and implemented a balanced approach to new spending through a sustainable staff model with best-in-class benefits for an organization of our size. We have also increased efficiency to reduce expenses while maintaining our high-impact programming. Finally, we regularly use financial data, an equity lens, and staff feedback to inform organizational decisions.

### STRATEGIC INITIATIVES

**4.1 Financial Model & Funding**

**4.2 Staffing Model, Benefits & Compensation**

**4.3 Basecamps & Office Plan**

**4.4 Climate & OBI Environmental Charter**

### 3-YEAR SMART OBJECTIVES

<p><b>4.1 Financial Model &amp; Funding</b></p>	<p>By 2025, OBCA has implemented an evolved fundraising and sales strategy that ensures our income exceeds our expenses with three months of cash on hand each year, allowing us to grant more scholarships and support more community-based programs. Dynamic fundraising efforts, which include alumni engagement and a diversified base of individual and institutional donors, provide us with a deeper pool of investors in Southern California and a meaningful fund or endowment. OBCA consistently leverages a financial modeling tool to ensure cost forecasting is an embedded consideration in organization-wide decision making and planning efforts, and our pricing model covers the costs of running programs and allows us to pivot to respond to changing environmental conditions or other unforeseen circumstances.</p>
<p><b>4.2 Staffing Model, Benefits &amp; Compensation</b></p>	<p>By 2025, OBCA has established an administrative and program staff structure that the organization can build on to serve more students from underrepresented communities and that is sustainable for staff and the organization as a whole. We have a healthy mix of full-time, part-time, and consultant support to be resilient to turnover and new challenges and ensure appropriate redundancies and specialization in roles. We pay above the mean salaries for all positions, provide performance-based and cost-of-living pay increases, and have a clear and transparent compensation and benefits structure that attracts and retains dynamic, relevant, experienced staff.</p>
<p><b>4.3 Basecamps &amp; Office Plan</b></p>	<p>By 2025, OBCA’s facilities plan ensures we operate out of four facilities, two basecamps, one ropes course, and a shared administrative space in the greater Bay Area. The two basecamps include administrative space as well as space for program planning, debriefing, equipment storage, and staff housing. Basecamp facilities are designed to support site-specific, year-round programming, and they are in climate-resilient locations that are accessible to staff. All basecamps are environmentally friendly (e.g., they utilize solar energy and grow food), and each basecamp has a fully functioning, climate-controlled warehouse for gear. Office space includes space for Bay Area regional staff to support the ropes course, fundraising, and other organization operations. We have also developed collaborative partnerships with other nonprofits in the Bay Area and California-at-large with support facilities. OBCA’s facilities are dynamic, comfortable, and support collaboration, thus they serve as a recruitment tool for future staff and increase productivity and morale among current staff.</p>

#### 4.4 Climate & OBI Environmental Charter

By 2026, OBICA has reviewed and adopted the OBI environmental charter for operations, which guides us to consistently implement an organization-specific set of eco-friendly, green business practices. These operational evolutions result in OBICA decreasing its environmental impact.

## D. GOVERNANCE

Based on data collected from a board self-assessment and a collaborative data-sharing meeting, the OBICA board continues to identify its planning priorities and how it will support OBICA's vision for impact. The goal of this work is to articulate the paths that will enhance the board's overall health and clarify the board's role in supporting the long-term initiatives of this strategic plan and the achievement of OBICA's vision for impact.

## E. ACCOUNTABILITY & COMMUNICATION

Bloom facilitated a discussion with OBICA leadership to develop an accountability plan that ensures impact through full-scale implementation. Specifically, the accountability plan scopes the parameters that OBICA's staff will adhere to in supporting the implementation plan. Leadership reached agreement on the following critical components: 1) key players in regular plan progress monitoring, 2) reporting structures for implementation teams, 3) progress monitoring practices, and 4) key risks and contingency plans.

## F. METRICS & MEASURES

OBICA recognizes that creating effective, targeted metrics is essential to monitoring the organization's success, particularly as it takes on bold and innovative initiatives. OBICA will use a comprehensive set of metrics to monitor progress toward achievement of each pathway's strategic objectives. The metrics and targets are aligned with each of the four pathways. OBICA will utilize existing and new data collection tools to ensure consistent data collection and monitoring.

## G. FINANCIAL MODELING

To meet the vision for impact and maintain organizational sustainability, OBICA's leadership worked with Bloom to design a *Financial Modeling Tool* that supports year-over-year budgetary decisions and assesses how the financial plans align with the strategic, values-aligned goals of the organization. OBICA will use the tool in the annual budgeting process and the review of major expenditures, staff modeling, and prioritization of equitable participant program access.

## H. PLANNERS

This strategic plan represents hundreds of hours of work and feedback by many members of the OBICA network. Participants included: OBICA administrative and field staff, board, donors, and partners. The list on the following page reflects the stakeholders who comprised the project management team and action-planning pathway work groups. Additional stakeholders supported the process through their participation in research activities, the research review, visioning, and governance sessions. Although these stakeholders are not individually named, their contributions to the strategic planning process were essential.

## OBCA Planning Work Group Members

### People & Culture

- Sushi Au, High Sierra Logistics Manager
- Elena Chin, High Sierra Associate Program Manager
- Winn Ellis, Board Co-Chair
- Lisa Fierman, Field Staff
- Jessica Haist, Associate Program Director, Staffing and Programming
- Nettie Pardue, Executive Director
- Matt Richter, Field Staff
- Lawrence Schuessler, Field Staff

### Partnerships & Programs

- Jonathan Dasani, Instructor
- Eli Fox, Outreach and Alumni Manager
- Steve Hagler, Board Member
- Victoria Lee, Field Staff
- Nettie Pardue, Executive Director
- Jeff Podmayer, Southern California Program Director
- Jason Schmidt, Director of Programs and Safety
- Stephanie Sherman, Field Staff
- Melissa Tang, Bay Area Program Director

### Bloom Planning

- Ingrid Boucher, Founder & Principal
- Neil Dwyer, Director of Business Strategy, Associate Consultant
- Jessica Gillespie, Director of Research & Communications, Consultant (formerly)
- Graig Weiss, Financial Modeler

### Learning & Impact

- Sean Altman, Bay Area Associate Program Director
- Carolyn Blessing, Student Services Associate
- John Dalbey, Field Staff
- Emily Ford, Development Coordinator
- Rose Livermore, High Sierra Program Director
- Laura Manczewski, Field Staff
- Nettie Pardue, Executive Director

### Sustainability

- Lindsay Blake, Associate Director of Student Services & Course Adviser
- Ed Colloton, Board Co-Chair
- Lori Guy, Board Member
- Doug Levick, Board Member
- Alan Nguyen, Board Member
- Nettie Pardue, Executive Director
- Matt Patchell, Development Officer
- Emma Rapp, Director of Advancement
- Laura Romanosky, Director of Finance, HR, and Operations
- Topher Solmssen, Board Member

## I. OBCA'S STRATEGIC PLAN AT A GLANCE

*Vision for Impact:* See page 1 for OBCA's vision for impact statement

**Pathway 1**



**People & Culture**

- 1.1 Recruitment & Retention of Staff from Nondominant Identities
- 1.2 Organization-Wide Equity Initiatives
- 1.3 Board & Staff Relationship Building (Alignment)
- 1.4 Career Pathways

**Pathway 2**



**Partnerships & Program**

- 2.1 Climate Adaptable Programs
- 2.2 Program Model & Progression Pathways
- 2.3 Partnerships & Communities
- 2.4 Curriculum Development

**Pathway 3**



**Learning & Impact**

- 3.1 Culture of Learning & Continuous Improvement
- 3.2 Communicating OBCA's Impact Story
- 3.3 Organizational Data Gathering & Reflection

**Pathway 4**



**Sustainability**

- 4.1 Financial Model & Funding
- 4.2 Staffing Model, Benefits & Compensation
- 4.3 Basecamps & Office Plan
- 4.4 Climate & OBI Environmental Charter