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# ANNUAL REPORT 2015



# NEW PEAKS TO CLIMB

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Taking up the role of CEO at Outward Bound in February 2015 has been a humbling experience.

Our mission is to help create better people, better communities and a better world, and I am proud to say that the team at Outward Bound are achieving this every day. This year 1,593 students came through the doors at Anakiwa, on their way to a life-changing journey of self discovery. Our courses continue to deliver, and I have the privilege of receiving countless letters from students thanking us for helping them find a new future.

“For the first time I have tramped up steep mountains, kayaked, climbed to the very top of a rock wall, sailed, rowed, swum with dolphins, run towards the sunrise and learnt the art of reflection. Between stimulus and response there is space. And in that space is our power to choose our response, our attitude. Thank you for this incredible experience.”



**JASMINE CROSBIE**

Teen parent and recipient of Joyce Fisher Charitable Trust Scholarship, Classic Course, Kupe 605

## **PARTNERSHIP FOCUS**

As always, the non-profit sector is a challenging space to operate in. Making ends meet while offering New Zealand's leading outdoor education experiences is not easy! This year we have focused on regional growth. We created the Kotahitanga course specifically for Northland students, an area that has traditionally been under-represented at Anakiwa. Our team has also increased bookings from Southland and the wider Wellington region through an increased focus on existing and new connections.

Our Community Partnerships Programme continues to deliver strong results. These partners are non-profits, and are provided opportunities to attend our courses on scholarships thanks to the support of Outward Bound's generous donor base. To ensure we maintain an appropriate mix of students on our courses, and to break-even financially, we are looking to diversify the programme to include partners who are able to pay a greater proportion of the course fee.

Business courses are another key component of our course mix. These courses help create New Zealand's future leaders, and are an important income generator. We are therefore analysing our corporate product offering to include the latest thinking in leadership and business management techniques.

## **KEEPING A WATCH ON SAFETY**

Our new Safety Manager Simon Graney successfully completed our first health and safety audit at Anakiwa under the new Adventure Activity Regulations. Monitoring and improving our safety systems is a key part of our work at the school, so we're pleased that the new audit process has validated our approach.

Anakiwa's buildings continue to require a number of upgrades this year, and we have launched a donation campaign for a new *Tortuga* safety vessel.

## **SERVING OUR COMMUNITY**

Partnerships with the local Marlborough community are an important part of our operations in the area. They are an opportunity to give back to the community, and give our students an authentic experience of the environmental conservation and service ethic we teach at the school. This year we continued to work on the 42 kilometre Picton to Havelock Link Pathway with the project's co-founder Rick Edmonds. Other initiatives have included Department of Conservation projects, and native tree planting with Rai River Landcare Trust.

## **FUTURE GROWTH**

Our business plan for next year will focus on regional sales, bookings through business and community partnerships, and reviewing our business offering. After more than 15 years of service, our Finance and Funding Manager Diane Leyten will be moving on to new opportunities. Diane has shown amazing dedication and commitment to Outward Bound, and she will be greatly missed. We wish her all the best for her future.

We are in a period of change at Outward Bound – refocusing our business strategy, changing our organisational structure and preparing for the future. It's exciting to be involved in this journey, and I'm looking forward to seeing the positive impacts of these changes.

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## **VICTOR KLAP**

Outward Bound  
CEO



# WORLD-LEADING OUTDOOR EDUCATION

In my seven years of involvement with Outward Bound I have been constantly impressed by the level of commitment, skill and professionalism that surrounds this organisation.

Our team at Anakiwa continues to deliver globally-recognised outdoor education experiences while managing operations within tight budgets. I congratulate our staff for their continued level of dedication to delivering high-impact course outcomes for our students. And to my fellow board members, my thanks for your support through the changes that we've seen this year.

I would also like to thank the members of our External Safety Advisory Committee. The health and safety of our students and staff is a vital part of everything we do, and the work done by this Committee is so valuable in maintaining our high standards.

This year Trevor Taylor stepped down after 14 years as CEO. Trevor made a significant contribution to Outward Bound during his time, and we wish him well for the years ahead. In February we welcomed Victor Klap as

our new CEO. Victor brings a wealth of knowledge from his previous roles in the public and private sector, and is already making a positive impact on our business and strategic plan. He completed a Discovery Course in 2008, and has a strong understanding of our values and ethos.

We are immensely grateful for the large number of donations received this year from many New Zealanders who see the value of what we do. Donations come in all shapes and sizes, and we appreciate every gift. However I'd like to particularly thank the Trustees of the Joyce & Woolf Fisher Charitable Trusts, Rangatira, Pub Charity and New Zealand Community Trust for their continued support. Their contributions, along with the support of countless others, have given people from around New Zealand the opportunity to attend our courses, and have funded capital expenditure projects, such as our new Cutter, the *Torea*.

Donations also help to sustain the Foundation, established in 2001 to support the work of the Trust. Funds are invested in a managed investment portfolio and income from this portfolio is used for scholarships, capital projects and operating expenditure. Thanks to a number

of generous donors and a prudent investment strategy, the Foundation's assets are now valued at \$16 million.

Our Members Council has welcomed new member Marissa Flowerday, said farewell to Gilly Oppenheim and Alice Rika and supported the election of Councillors Ian Moody and Tim Watts to the Trust Board. Gilly's 20 years of service is greatly appreciated and we wish her well. The Council brings a breadth of skills and experience to the Outward Bound community, and has helped to develop some important on-going community partnerships this year.

Within the Outward Bound family we continually face the challenge of attracting more people to experience the benefits of an Outward Bound experience. New Zealand's population is changing rapidly and people have so many activities to capture their attention and time. However we know that the benefits of an Outward Bound course are just as relevant now as they were 25 years ago. In our own way each of us must do all we can to ensure that the Outward Bound opportunity continues to be available to as many New Zealanders as possible.

**ANDREW SMITH**  
Outward Bound  
Chair



# OUR DIRECTORY

## PATRON

Sir David Levene

## TRUST BOARD

Andrew Smith (President)  
Glenys Coughlan (Vice)  
Mark Bentley  
Dick Hubbard  
Ian Moody  
Hilary Sumpter  
Dave Tibby  
Tim Watts

## FINANCE COMMITTEE

Glenys Coughlan (Chair)  
Andrew Smith  
Dave Tibby  
Tim Watts

## FOUNDATION BOARD

Andrew Smith (Chair)  
Sir David Levene  
Grant Faber  
Dynes Fulton  
Brien Mahoney  
John Patterson  
Dave Tibby

## HONORARY VICE PRESIDENTS

Ivan Emirali  
Mac Morgan

## KURT HAHN AWARD RECIPIENTS

Dick Hubbard (2013)  
Ron Faber (2014)

## GUARDIANS

Julie Jones  
Brien Mahoney  
Russell Moller  
Barry Sweet  
Sir David Tompkins  
Marshall Wright

## ADVISORS

Holland Beckett  
Solicitor

Grant Thornton  
Auditor

Lloyd East and Associates  
Insurance Broker

## EXECUTIVE SAFETY AND ADVISORY COMMITTEE (ESAC)

Ian Moody  
ESAC Chair & Board Member

Mark Smith  
Safety Auditor Qualmark,  
Chairperson Register  
of Outdoor Safety

Mark Lewis  
Operations Manager  
Army Leadership Centre

John Patterson  
Legal Advisor, Past President

Dr Nick Binns  
Screening and Emergency  
Medicine Specialist

Phil Bishop  
Sea Operations Specialist

## COUNCILLORS

Marina Adams  
Claire Anderson  
Howie Barnes  
Bonnie Bolton-Roger  
Ross Browne  
Shelley Clark  
Pip Davidson  
Grant Faber  
Marissa Flowerday  
Linda Gaskin  
Andrew Gilmour  
Tracey Hancock  
Brandon McCarthy  
Elizabeth McKee  
Ian Moody  
Ginny Semmens  
Tim Watts

# OUR FINANCES

## CHARITIES REGISTRATION

The parent and subsidiary are both registered as charitable entities under the Charities Act 2005: Outward Bound Trust – CC34682  
Outward Bound Foundation – CC22777

## PURPOSE OF ENTITIES

Outward Bound Trust of New Zealand, incorporated in November 1997 under the Charitable Trusts Act 1957, is the operational arm of the Group and includes all revenue and expenditure associated with promoting, administering and running all courses.

Outward Bound Trust of New Zealand Foundation, incorporated in October 2001 under the Charitable Trusts Act 1957, is the funding arm for the Trust. Only income generated from the Endowment Funds held within the Foundation are available to the Trust for financial assistance of student scholarships, and for operational grants in support of running Outward Bound courses.

## NOTES

There have been three sets of financial statements prepared and audited for the year ended 30 June 2015 - Outward Bound Trust of New Zealand (Trust), Outward Bound Trust of New Zealand Foundation (Foundation) and for the consolidated Group (Group). The following information is applicable to all three entities.

The full financial statements, which are presented in New Zealand Dollars, have been prepared in accordance with generally accepted accounting practice in New Zealand (NZ GAAP). They comply with New Zealand equivalents to International Financial Reporting Standards (NZ IFRS) and other applicable financial reporting standards applicable to public benefit entities.

The following financial information has been extracted from the full financial statements for the year ending 30 June 2015, as signed and approved by the Board on 20 August 2015. As such this extraction of information cannot be expected to provide as complete an understanding of the financial position, performance and cash flows as provided in the full financial statements.

It is not intended that this information be classed as Summary Financial Accounts under FRS43 of the Financial Reporting Act 2004.

The Group's auditors, Grant Thornton, have issued an unqualified opinion for all three entities. Copies of the full financial statements are available upon request. Contact us at [governance@outwardbound.co.nz](mailto:governance@outwardbound.co.nz)

This year we granted **\$1,133,049** for student scholarships from the Foundation, helping Anakiwa become a reality for more New Zealanders.

## FINANCIAL OVERVIEW OF THE TRUST

### Deficit

Operating revenue <sup>1</sup>	5,177,191
Operating expenditure <sup>2</sup>	(5,767,072)
Specific revenue <sup>3</sup>	1,756,187
Specific expenditure <sup>4</sup>	(1,425,538)
<b>Net deficit</b>	<b>(259,232)</b>

### Equity

Current assets	1,253,790
Non-current assets	6,399,385
Current liabilities	(2,179,035)
Non-current liabilities	(275,205)
Net assets	5,198,935
Opening equity	5,458,167
Net deficit	(259,232)
Closing equity	5,198,935

- Operating revenue includes income generated from course fees, merchandise sales, general donations and interest.
- Operating expenditure includes costs of running courses including staffing, maintenance, depreciation and marketing costs.
- Specific revenue includes donations & grants received for the following:

Student Scholarships	\$298,975
Capital projects	\$76,472
Outward Bound Foundation student scholarships & grants given for student course fees	\$1,380,740
- Specific expenditure is the value of scholarships & grants given for student course fees.

## FINANCIAL OVERVIEW OF THE FOUNDATION

### Surplus

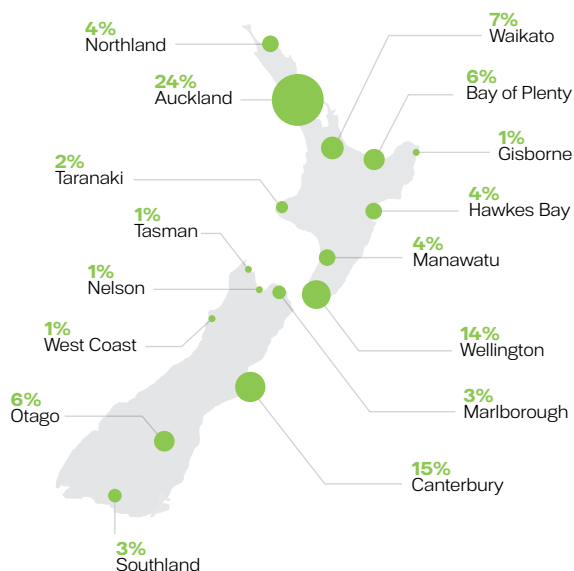
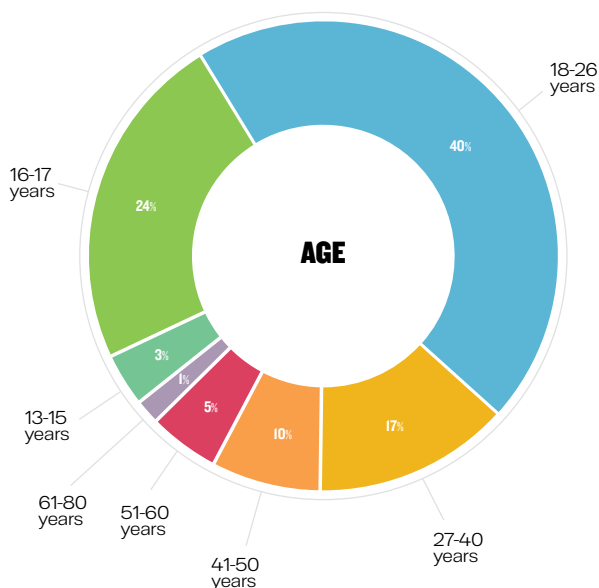
Unrealised gains/(losses) on investment <sup>1</sup>	1,165,500
Realised gains/(losses) on investment <sup>2</sup>	167,867
Other income <sup>3</sup>	2,949,147
Financial assistance & grants <sup>4</sup>	(1,133,049)
Other expenses <sup>5</sup>	(482,983)
<b>Net surplus</b>	<b>2,666,482</b>

### Equity

Current assets	2,377,707
Non-current assets	14,391,735
Liabilities	(3,500)
Net assets	16,765,942
Opening equity	14,099,460
Net surplus	2,666,482
Closing equity	16,765,942

- Unrealised gains/(losses) indicate the movement in market value of the Foundation's investment portfolio. As at 30 June 2015 the market value of the Foundation's investment portfolio was **\$14,191,735**.
- Realised gains/(losses) were incurred upon the realisation of equity in the Foundation's investment portfolio.
- Other income relates to income generated on the Foundation's investments as well as donations of **\$2,182,035** accumulated to the value of the Endowment Fund.
- Grants given to the Trust for student scholarships and operational purposes.
- Other expenses include audit and investment advisory fees.

# STRONG OUTCOMES, LASTING IMPACT



## OUR POSITIVE IMPACT

Evaluation of this year's programmes shows that students are continuing to achieve fantastic course outcomes. 94% of the courses scored as having 'significantly developed' participants. They're heading home more self-aware, more resilient and more accountable, having grown in confidence and determination. Our Watchmates are returning to their communities with new skills and a strong understanding of their personal values.

This year **1,593** people took on the Outward Bound challenge at Anakiwa

We're also delighted to share news of an overall increase in the impact of our courses this year. Not only has our average effect size<sup>2</sup> improved from 2013/14, we also noted that eight of our Watches scored unprecedented levels of development<sup>3</sup> during their course. These eight high-scoring Watches included a team from Duncan New Zealand, a new Custom Design client who experienced their first course in May of this year.

## THE LONGER TERM

Competing in an Iron Man race, beginning a new business venture, embarking on a second Bachelor's degree, volunteering in Africa. This year we heard from many of our Outward Bound alumni, who continue to accomplish these incredible goals, and much more.

When it comes to sport, two of our 2014/15 alumni have achieved something truly unique. Come September Eliot Lundon-Moore (Scott Watch, May 2015) will be heading to the Youth Commonwealth Games with the New Zealand swim team. Meanwhile, Horizons alumni Aaron Garnham-Pitcher is set to take part in the 2015 Taekwon-do Foundation's World Championships.

Equally, our alumni are also making waves in industry. In June, Batten Watchmate Rahul Babu was named Industrial Apprentice of the Year at the Master Electricians Challenge.

While anecdotally we know our courses create lasting changes for our alumni, we are keen to statistically measure the medium and long-term effects of our courses. We're set to commission our first piece of externally-lead research, which follows up with participants after their course. We'll also be contacting parents, teachers and employers to hear their perceptions of how life has improved for our alumni after their course. We hope this will give us a clear and statistically-robust picture of our long-term impact—helping others understand the value of our work.

1. Based on Programme Evaluation Questionnaires completed by participants before and after their course.
2. To measure student outcomes we use a Programme Evaluation Questionnaire, which students complete on the first and final day of their course. Any developmental change they perceive is measured in terms of an "effect size". An effect size of 0 indicates no change, 0-0.2 indicates minor change, 0.2-0.4 indicates a change, 0.4-0.6 indicates a major change, above 0.6 indicates a significant change. Our average effect size improved to 0.92 in 2014/15.
3. 8 Watches in 2014/15 scored an effect size of above 1.5 for one or more outcomes of their course.

# OUR STORIES

Outward Bound is best understood through the eyes of the thousands of students who have passed through Anakiwa.

“I feel most powerless when things are out of my control. On the rock wall at Anakiwa, wet rocks, caught rope, seeing no way forward, all felt unfair. But this is not an excuse to give up. I was surprised at how little I needed to hold me while I looked for the next hold. I learnt so much at Outward Bound. My course was ruthless, intense, beautiful—just like mother nature. With integrity and pride I know I gave it my all.”



**ROSIE REMMERSWAAL**  
Recipient of Rotary Club of Port Nicholson Scholarship  
Classic Course, Batten 604

“Having spent the last thirty years raising our sons and working with other kids, I was facing an empty nest and feeling redundant. The Outward Bound ethos “There is more in you” has opened my eyes to possibilities. I have so much more to give. I will take the lessons I have learned about myself, and the ability to see potential in others, with me always. Thank you—I’ll be forever grateful.”



**ANDREA CUNIFFE**  
Blue Light Volunteer and recipient of Outward Bound Foundation Scholarship  
Connect Course, Batten 599

“I can’t pinpoint a favourite moment on my OB course. Everything was incredible. Since I’ve returned home I’ve tried to live by new values—physical fitness, service, self-reliance, and above all, compassion. I’ve started thinking about the environment a bit more, and have set up a recycling scheme at home. I’ve continued to take on new challenges and seize opportunities. Thank you. You’ve allowed me to change my life for the better.”



**MADISON HUTTON**  
School Leader and recipient of Pub Charity partial scholarship, School Leaders Course, Shackleton 604

“When I returned from my Outward Bound course I applied for the position of head boy at my college. After speeches, interviews and voting it was finally announced that I had been successful. Without my OB experience I would never have had the self-belief to go for this position. Thank you for this amazing experience—it has been the most challenging and rewarding 21 days of my life.”



**JOSH MACMILLAN**  
Recipient of Otago Community Trust Scholarship  
Mind Body Soul Course, Kupe 598

“I have forgiven myself for what I am not, and appreciate myself for who I am. I have learnt that happiness cannot come to you, it can only come from you. So I am remaining true to my values—compassion, forgiveness, open-mindedness, understanding, the importance of family. Thank you Outward Bound. You have changed my life.”



**CHARLOTTE WOOLFORD**  
Recipient of OB Foundation Scholarship (Woolf Fisher Charitable Trust),  
Classic Course, Cook 599

Our donors have stories too. Many have strong connections to Outward Bound and the life-changing work that we do.

The late Sir Woolf (1912-1975) and Lady Joyce (1912-2009) Fisher were instrumental in the establishment of Outward Bound New Zealand. Sir Woolf was Outward Bound’s first president and financially assisted over 80 people to attend Outward Bound through the Woolf Fisher Charitable Trust. In 2001 a \$2m pledge from his Charitable Trust launched our Outward Bound Foundation.

Lady Joyce Fisher shared Sir Woolf’s passion for education and she maintained an ongoing connection with Outward Bound via her many sponsorships and bequests. Before her death in 2009, the Trust would receive a cheque from Lady Joyce every year, along with a heartfelt handwritten note endorsing the wonderful work achieved by Outward Bound.

# THANK YOU

A N Matheson Trust  
 Acorn Foundation  
 Advance Ashburton Community Foundation  
 Alistair Ball  
 Allan Jury  
 Andrew & Penny Gawith  
 Andrew Gilmour  
 Andrew Horsbrugh  
 Andrew Lynch Memorial Scholarship  
 Anna McNuff  
 Annabelle Powelle-Thomas  
 ASB Bank Ltd  
 Ashley Rule  
 Barry Lindsay  
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 Blue Gavel New Zealand  
 Bob Bryan  
 Bongani Sikupa  
 Brendan Barry  
 Brett O'Malley  
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 Buller District Council  
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 Claire Anderson  
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 Gabrielle Tully  
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 Gerard Kennedy  
 Ginny Semmens  
 Girl Guiding NZ  
 Glisten Jewellers  
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 Grant Rae

H W Shaw  
 Halberg Disability Sport Foundation  
 Helen Fletcher  
 Helen Williamson  
 Hilary McPherson  
 Hilary Sumpter  
 Ian Harrison  
 Infinity Foundation Ltd  
 ITNZ Solutions  
 Jacki Mylchreest  
 James Plummer Memorial Trust  
 Jan Hitchon  
 Joan Robinson  
 John Hoffeins  
 John McKernohan  
 John Morton  
 John Quirke  
 K More Trust  
 Kate Voss  
 Kathmandu Payroll Giving programme  
 Keith Managh Memorial Scholarship  
 Kerry Vickers  
 Lake Taupo Christian Camp Trust  
 Laurie Winter  
 Les McGreevy  
 Liam Palmer  
 Linda Gaskin  
 Lions Clubs of:  
 Auckland University of Technology, Blenheim,  
 Christchurch North, Christchurch South,  
 Halswell & District, Howick, Island Bay, Kaikoura,  
 Marton, Napier Host, Remuera, Wellington Host  
 Lucy Blakiston  
 Madi Bird  
 Malcolm Sewell  
 Mangatawa Beale Williams Memorial Trust  
 Margaret Hooton  
 Marion Lyons  
 Mark Wickens  
 Marlborough District Council  
 Marlborough First Light Foundation  
 Maurice Carter Charitable Trust  
 McKenzie family  
 Michael Barr  
 Michael Brooke  
 Mike Jaspers  
 Nick Binns  
 Nicola Potter  
 Noel Haglund  
 Norman Jones Foundation  
 Open Home Foundation  
 P H Picot Charitable Trust  
 Paul Edwards

Paul Styles  
 Penzance Charitable Trust  
 Peter Biland  
 Peter Brandon  
 Picton Senior Citizens Club  
 Pip Davidson  
 Prageeth Jayathissa  
 Rachael Young  
 Rae Garland  
 Raewyn Kirkman  
 Reuben Lewthwaite  
 Richard Bishop  
 Ronaki Limited  
 Ronald Brownlie  
 Ross Browne  
 Ross Nevell  
 Rotary Clubs of:  
 Ashburton, Blenheim, Christchurch Sunrise,  
 Courtenay Place, Gisborne, Havelock North,  
 Henderson, Hornby Charitable Trust, Howick,  
 Invercargill, Kumeu, Lincoln, Milford,  
 Mount Maunganui, Napier, Paraparaumu,  
 Port Nicholson, Queenstown Charitable  
 Trust, Rangiora, Riccarton, Rotorua,  
 Rotorua Sunrise, St Johns, Tauranga,  
 Tauranga Sunrise, Timaru, Waipukurau  
 Rotorua Energy Charitable Trust  
 Shane Dolan  
 Sharon McLeod  
 Shelley Bignell  
 Southern Victorian Charitable Trust  
 Spark Give a Little Foundation  
 St Patrick's Day Golf Classic Charitable Trust  
 Stevie McLellan  
 Stewart McRobie  
 Susan Ching  
 Sutherland Self Help Trust Board  
 Tappenden Holdings  
 Te Runanga O Ngai Tahu  
 The Duncan Outward Bound Fund  
 Tim Watts  
 Timothy Burgess  
 Tony Alexander  
 Tony Watson  
 Tracey Hancock  
 Trevor Taylor  
 Very Impressive Software  
 Waihenga St John's Lodge  
 Whanganui Restorative Justice Trust  
 William Andrews  
 Winton & Margaret Bear Charitable Trust  
 Women's Refuge

## EXTRA SPECIAL THANKS TO THESE ORGANISATIONS:

