



THE ULYSSES TRUST

Patron: HRH The Prince of Wales



Annual Review 2015





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CLARENCE HOUSE

I am proud to have been the Patron of the Ulysses Trust since its inception in 1992. The Trust's purpose is to provide financial support to encourage young people of the United Kingdom's Reserve and Cadet Forces to take part in outdoor challenging pursuits and expeditions. The rationale for this is two-fold. Firstly, such opportunities enhance the morale and recruitment of these outstanding organisations. Secondly, and perhaps more importantly, they help develop the qualities of leadership, teamwork, initiative, confidence and self-discipline of those taking part – so vital in enabling them to achieve their full potential within their communities, at work and for society in general.

In the 23 years of operations, the Trust has provided some £2.4m to help mount close to 2000 expeditions involving over 29,000 young people. For some, the experiences have been simply life-changing. It has only been able to do this thanks to the generosity of many individuals and organisations over that time and, along with the Trust team, I am extremely grateful for this support.

Nevertheless, research has shown that many Cadets, especially those from more deprived or challenging backgrounds, are still excluded from the benefits of such opportunities on grounds of cost. As the Trust approaches its 25th anniversary in 2017, it has committed to extend its reach to these young people by increasing the support it provides to Service Cadets by a factor of three. This will be challenging, but those already involved with the Trust will appreciate the clear benefit of this approach.

By working through the existing well-respected infrastructure of the Cadet and Reserve Forces, the Ulysses Trust makes a unique, but very effective contribution to the development and engagement of our young people. It can only do so with the generous financial assistance of others, and therefore, I can only hope the Trust's valuable work will be seen as worthy of that support.



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FOREWORD

There is little doubt that 2015 was a very good year for the Ulysses Trust – by anyone’s definition. Some great expeditions were supported, there were some exciting fund raising developments, the overall management of the Trust was much more focused and the governance of the Charity was strengthened. Additionally, the Trust’s Patron, HRH the Prince of Wales, took an active interest in the Charity’s activities and reaffirmed his support for the Trust; this was highlighted earlier in the Report.

It goes almost without saying, but it should nevertheless be highlighted how passionate the Trust’s team is regarding the value of the outdoors in terms of developing the country’s young people. The view is that adventurous activities can provide a step change in the development of individuals, which benefits the people concerned, their units and society at large.

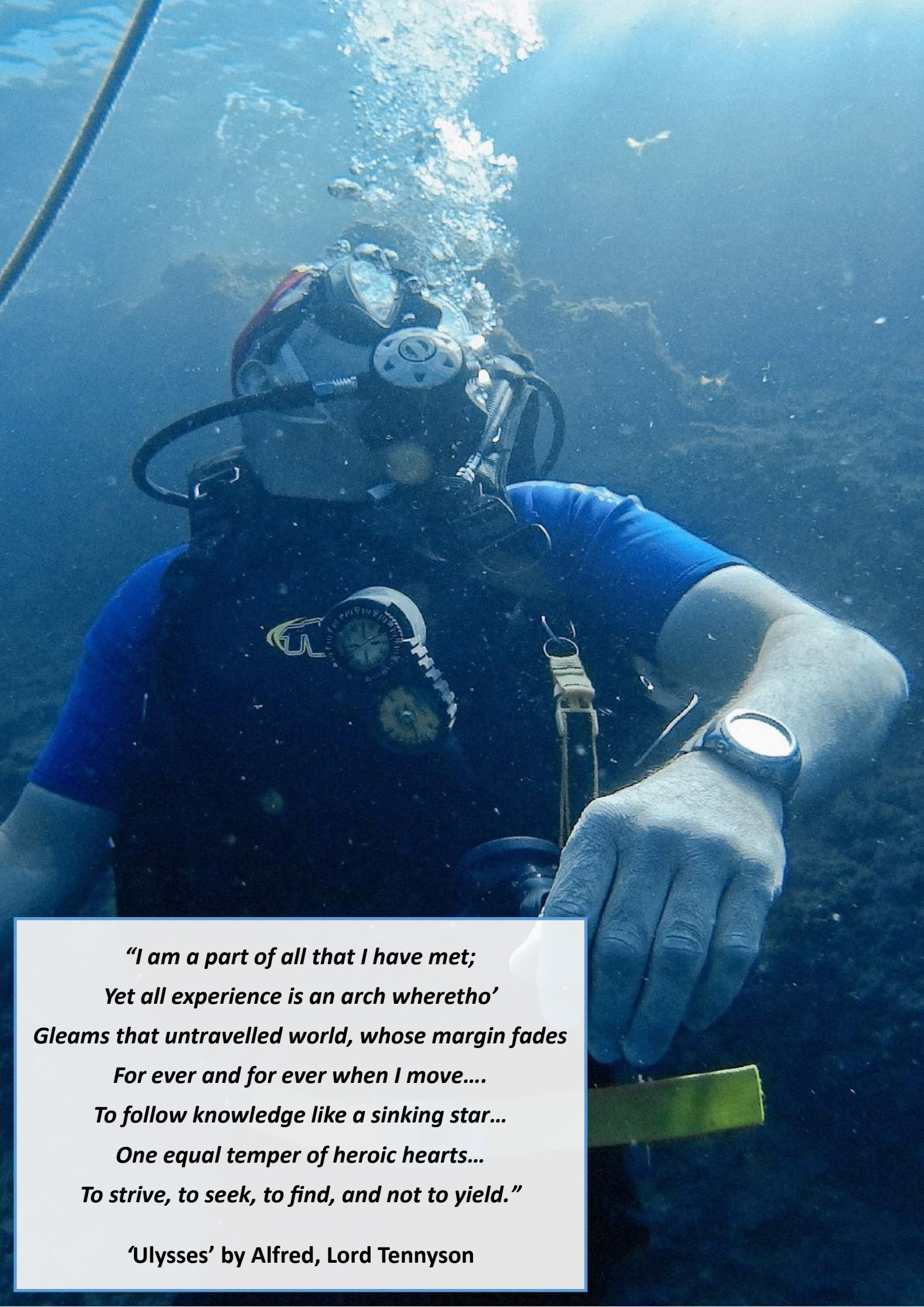
Clearly, the Charity would be a very limited proposition without a wide-ranging number of benefactors. On behalf of the Trust, I should like to thank you for your support. It is never taken for

granted and I hope you feel that the Trust makes the most of your donations. Moreover, please do continue supporting; the Charity is keen to develop long-term relationships with you. To our beneficiaries, wearing hats marked ‘organiser’ or ‘participant’ – or perhaps both, the Trust is here to support you – please do use us.

To the home team, including the Trustees, Officers and Advisers, thank you for your assistance over the last year. Your guidance, humour and energy were very much welcomed. Additionally, as we put our feet up and consider what was achieved, we should not forget that some 1719 young people benefitted in 2015 as a result of our endeavours – that is a lot of smiling faces!

Finally, I am hoping that you will enjoy reviewing the Trust’s activities over 2015 and look forward to engaging with you during 2016.

Air Vice-Marshal N J E Kurth CBE FRGS
Chairman of Trustees / Executive Chairman



*"I am a part of all that I have met;
Yet all experience is an arch wheretho'
Gleams that untravelled world, whose margin fades
For ever and for ever when I move....
To follow knowledge like a sinking star...
One equal temper of heroic hearts...
To strive, to seek, to find, and not to yield."*

'Ulysses' by Alfred, Lord Tennyson



INTRODUCTION

PURPOSE

The Ulysses Trust, named appropriately after the great warrior and adventurer of Greek mythology, has now been providing financial support and encouraging challenging expeditions and projects by units of the UK's Volunteer Reserve and Cadet Forces for 23 years.

Our firm belief is that the opportunities we support should take people out of their comfort zones and provide experiential learning that is fundamental to personal and organisational growth.

Our purpose, thereby, is to enhance the value of Reserves and Cadets to their local communities and society generally, by helping both to raise morale, recruitment and retention of units; and to develop the character and potential of the individual participants – especially in respect of leadership, teamwork, initiative, confidence, self-discipline and judgement.

Tennyson's poem, Ulysses (see left), provides the inspiration for the Trust and captures its ethos and values.

BACKGROUND

The Trust was established in 1992 on the back of a Territorial Army attempt at the first British ascent of Everest in winter. Prior to that, the concept of Reserve Forces expeditions did not exist and for Cadets was largely confined to adventurous training activities as part of an Annual Camp. An early challenge was therefore to encourage a change of attitude and break down barriers to such 'extramural' activity and the Trust, by close of 2015, had provided over £2.5M to help over 31,000 members of these organisations take part in some 2500 expeditions embracing a range of challenging projects – both adventurous and community service related - from the UK to the farthest reaches of the world. We do continue however to work closely with other stakeholders - to encourage, to keep impediments to planning expeditions to a minimum, and to promote as

inclusive participation in such opportunities as possible.


Recognising that all have to start somewhere, and that first steps are often the hardest, we provide grants to support the spectrum of ambition, from the modest to major expeditions that take people to the limits of the possible – so long as the project aligns with our guiding ethos.

Requests for our help continue to grow. The Ulysses Trust provided grants totalling £206,188 to 112 expeditions benefitting 1719 young people in 2015. These grants are biased towards units located in the lower quartile of the Government Indices of Mean Deprivation.

To sustain our mission, most of what we grant has to be raised annually, so fundraising is a fundamental part of our business. We have a number of long-standing benefactors to whom we are hugely grateful. In order to ensure all (especially Cadets) can participate in the opportunities that we encourage regardless of means, we would like to do more. As we look to celebrate our 25th anniversary in 2017, we therefore continue to seek others who share our vision of building for the future by so investing in the development and engagement of our young people.

"The expedition was an amazing experience for all. It gave its members a chance to learn another culture, experience new things, witness the harshness of India's poverty stricken areas, and reflect on life back in the UK; appreciating all that they have and learning to help others in need."

282 (East Ham) Sqn ATC - Ex Thar Horizon - Trekking - Rajasthan

A high-angle photograph of a person climbing a steep, light-colored rock face. The climber is wearing a blue long-sleeved shirt, dark pants, and a red helmet. They are positioned on the left side of the frame, reaching up towards the top of the rock. The background shows a vast, green valley with dense evergreen forests and a few small buildings visible in the distance. The sky is clear and blue.

"I thoroughly enjoyed seeing first-hand the progress the young people made and how much they gained from the experience at such a young age. The skills and knowledge learnt will provide unique qualities that can be taken forward and I am tremendously proud of the team, their characteristics and achievements." Flt Lt Gary Richardson – 2344 (Longbenton) Sqn ATC - Operation Vertex – Mountaineering

2015 – LAYING FOUNDATIONS FOR THE FUTURE

THE CHALLENGE

Following Air Vice-Marshal Nick Kurth becoming Chairman of Trustees, our last Annual Review outlined the outcome of a strategic review of the Trust's governance, structure, the benefits that it provides and the impact sought, its priorities and long-term objectives. This review was supported by a survey of Cadet units, (seen as a priority for future support), and resulted in a new Business Plan to take the Trust through to its 25th anniversary in 2017, and beyond.

In broad terms, the Business Plan anticipated an increase in bids for support of expeditions by Reserve Forces units, following the drawdown from Afghanistan, to maintain morale and operational effectiveness, but considered that ongoing support from the Nuffield Trust for the Forces of the Crown would enable us to meet that effectively.

The real challenge lay with Cadets. In absolute terms, helping in excess of 1000 a year to take part in expeditions appeared encouraging, but this represented less than 1% of the Cadet population and, despite our grants, 56% of expedition costs were being found by the cadets themselves (or their parents). The survey indicated that this was rendering these opportunities unaffordable to many – and possibly those for whom the impact would be greatest. The trustees therefore determined that we should aim to increase our contribution of less than 9% to a level that meant the cadets themselves should have to find no more than 33%.

Combined with the establishment of 100 new Combined Cadet Force (CCF) contingents in state schools in 2015, with a further 147 to follow by 2020 we also anticipated a 40% increase in cadet bids for support by then. Given the lead-time from establishing a new cadet unit to considering mounting expeditions, we are not yet swamped by increased demand, so have extended our goal of increasing our grants of £90,000 to cadets in 2015



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by a factor of over 3 to 2020. This means raising Trust income of £214K in 2014 to over £500K by 2020.

2014 was very much a year of taking stock, identifying our long term goals, with the measures and resources to ensure the Trust's future health and relevance. With improved governance in place, the focus of the Trust in 2015, therefore, has been to lay the foundations for this significant change of gear, and particularly in our ability to raise the necessary funds.

"Adventurous Training is at the core of military values and invaluable to recruiting and retention." Maj Nick Kennon, 4 Lancs - Ex Northern Drakensberg Duke 2, KwaZulu-Natal Province, South Africa (pictured below at the Spion Kop memorial)





PROGRESS MADE

First, steps we put in place in 2014 are paying dividends:

- Enhanced governance has led to a sharper focus on our strategic objectives, the management of risk and a stronger team of trustees and other volunteers.
- Improved communications with all stakeholders have raised our profile and credibility, with the new website drawing many favourable comments and an increase in traffic, whilst our bi-annual newsletter is particularly well received. The work of our Communications Director, Jeremy Hurst, has been instrumental here. Together, they raise aspiration amongst our communities, but also provide essential insight to our supporters of the benefits that ensue.
- Changes to our on-line Grant Application processes make application simpler and are enabling the Grants Committee to make better informed judgements on how to allocate our funds. Moreover, we are now able to track this against Government Indices of Mean Deprivation.
- Revised guidance for post-expedition reports is slowly leading to an improved qualitative analysis of outcomes in an environment which does not lend itself to simple quantitative metrics. More remains to be done, however, working more closely with beneficiary units, individual participants, and in the case of cadets, their parents, to better capture impact.
- The outcome of the Cadet survey was reviewed with all Service Cadet Heads, and this has increased understanding of what the Trust does and the importance of the opportunities that it supports.

These measures proved the foundations for further notable progress in 2015:

- We were honoured to have our plans and aspirations for Cadets endorsed by our Patron (*see Page 3*).
- We are placing greater importance on our annual Awards for Best Expedition by Reservists, University Officer Training Corps and Cadets to raise aspiration, and to encourage a more thoughtful approach by expedition planners to the broader outcomes they want to achieve. We are delighted therefore that our Patron is helping us by agreeing to lend his name to the scheme. In future they will be the Prince of Wales's Awards, with certificates signed by His Royal Highness.
- Our fundraising has benefitted and income generation is now on a significantly stronger footing. Some long-standing benefactors have raised their level of support; we are receiving a growing number of long-term commitments, one from our first corporate supporter; and we received one substantial donation to be used as an endowment fund towards grants for Army cadets. As a result, we are able to plan more robustly for the future, and we enter 2016 with a record of over £210,000 of pledged income.
- To reinforce this, we are now starting, with the help of the Reserve Forces and the Cadet Associations (RFCA), to develop a more coherent regional presence throughout the country.
- We have engaged formally with sister charities, #iwill and Youth United - all benefitting from the patronage of HRH The Prince of Wales.

Much remains to be done, but we believe these are significant steps to making a meaningful difference to young lives and the future, and we are so grateful to all those who have helped us make that progress - and to our beneficiaries whose exploits that they report reinforces our determination to do more.



"This experience was truly a once in a lifetime opportunity to develop qualities already established in officer training and see the world. Everyone on the boat has profited immeasurably from our experiences as we were tested in ways we never thought were possible."

University of London OTC
Ex Transglobe 2015
Offshore Sailing - Atlantic Ocean

OPERATIONS

EXPEDITIONS 2015

The table (right) summarises the expeditions supported by the Trust that actually deployed in 2015 (a number of which were actually funded in 2014).

This represented fewer expeditions deployed than in 2014, principally due to sharp declines in Army Cadet Force (ACF) and Combined Cadet Force (CCF) expeditions. We are aware that some of their plans failed to get authorisation through the Army chain of command, and others struggled to find approved instructors. The challenges involved here might have deterred others from mounting expeditions. From our Cadet survey conducted in 2014, we suspect that the different needs of adult soldier and young Cadet organisations are not fully accounted for by the Army. Noting Government investment in expanding CCFs into state schools, these concerns have been raised with the appropriate authorities.

Mountain-related activities accounted for over 50% of expeditions, with canoeing, scuba diving and sailing accounting for a further 40%. 13% of expeditions took place in all parts of the UK both in summer and winter, a further 42% deployed to all parts of Europe from Arctic Norway to the Canary Islands. 14 expeditions went to North America, 10 to the Andes of South America, one went sailing in the Tasman Sea, 3 involved trans-ocean sailing, 7 visited the Himalayas and other high mountain areas of Asia, and one went to the Antarctic. A truly global programme!

One project is particularly worth noting for its scale and ambition. Exercise ALPINE ARC was an expedition to ski from one end of the Alps to the other – the first time for a British military expedition. It was led by a TA officer, Captain Tania Noakes, mounted by Oxford University Officer Training Corps, and over 11 stages of on average 8 days each, involved 58 participants split equally between Regular and Reserve/OTC, with support provided by the armies of Austria, Switzerland and France. This was a truly monumental one-army undertaking, but conceived, planned and executed by Reserve Forces (an abridged version of this expedition report can be found in the Annex).



Expeditions deployed from 1 Jan 15 to 31 Dec 15					
Unit type	Expeditions	Participants	Grants	Per person	Per Exped
Cadets - ACF:	8	327	£17,104	£52	£2,138
Cadets - Sea:	5	81	£9,100	£112	£1,820
Cadets - ATC:	13	227	£25,200	£111	£1,938
Cadets - CCF:	15	278	£19,110	£69	£1,274
All Cadets:	41	913	£70,514	£77	£1,720
University / DTUs:	26	355	£47,720	£134	£1,835
Reservists - TA:	36	321	£38,215	£119	£1,062
Reservists - RNR / RMR:	1	10	£2,000	£200	£2,000
Reservists - RAuxAF:	0	0	£0		
All Reservists:	37	331	£40,215	£121	£1,087
Totals:	104	1599	£158,449	£99	£1,524



GRANTS 2015

Grants approved in 2015 totalled £206,166, a 12% increase on 2014. With grant approvals leading departures by some 3 months, this indicates a recovery in 2016 from the decline in cadet expeditions deployed in 2015. Our support reached across the UK as shown in Table 1 (right), and grants were allocated to sectors of our community as shown in Table 2 (below).

Reserves and University Officer Cadets

There has been a significant (50%) increase in the number of Reserve Forces expeditions, but also in scale and ambition, which we expected following the drawdown from Afghanistan. As a result, grants to these more than doubled. From the applications we receive, it is abundantly clear that the opportunities we support are a vital ingredient of recruitment, retention, and maintaining operational robustness of our Reserves in the future. With increasing dependence on Reserves for our national security, we believe we make an important contribution here, which we largely

Table 1—2015 Grants By Region

UT Grants 2015 by UK Regions	No. of Expeds	Eligible Nos	Grant
Yorks & Humber	3	146	£5,500
Wessex	15	266	£27,170
Wales	9	144	£13,726
NW England & IOM	11	142	£14,690
N England	11	325	£14,404
Greater London	11	126	£24,500
SE England	15	151	£27,046
W Midlands	11	121	£41,880
E Midlands	8	68	£10,450
Highlands	1	20	£1,750
Lowland	4	87	£6,330
N Ireland	3	30	£4,400
E Anglia	6	50	£9,500
Other	4	43	£4,820
Totals	112	1719	£206,166

Table 2 - 2015 Grants per Unit Type

Grants from 1 Jan 15 to 31 Dec 15					
Unit type	Expeditions	Participants	Grants	Per person	Per exped
Cadets - ACF:	10	381	£20,804	£55	£2,080
Cadets - Sea:	4	75	£8,500	£113	£2,125
Cadets - ATC:	13	185	£25,560	£138	£1,966
Cadets - CCF:	19	388	£31,310	£81	£1,648
All Cadets:	46	1029	£86,174	£84	£1,873
University / DTUs:	21	281	£30,970	£110	£1,475
Reservists - TA:	45	409	£89,022	£218	£1,978
Reservists - RNR/RMR:	0	0	£0		
Reservists - RAuxAF:	0	0	£0		
All Reservists:	45	409	£89,022	£218	£1,978
Totals:	112	1719	£206,166	£120	£1,841

deliver due to the wholesome support of the Nuffield Trust. In that context, we are, with the Nuffield Trust, proud to be supporting another major project to rival ALPINE ARC, and this is the SPEAR 17 expedition that launches at the end of 2016. This is another 'first' being attempted by the TA – the first unsupported trek to the South Pole by a British military team - and which will conclude in the Ulysses Trust's 25th anniversary year.

Cadets

There was a decline in Cadet expeditions receiving grants in 2015. Those to Sea Cadets more than doubled from a low base. Grants to CCFs grew by almost £10,000, with 3 of the 19 CCF grants being to grant-maintained schools; as the 100 new CCFs now established in State Schools (with more to follow) become more active, this is likely to increase. With participant numbers roughly the same, the increase in grants reflects more ambitious expeditions and our deliberate policy to raise the proportion of our grant against participant contributions – and a weighting of grants to those of grant-maintained schools. There were 5 fewer ATC expeditions approved for grants than in 2015, but their quality and ambition continues to rise. Thanks to fulsome support of the RAFCT, we were able to well support these with significantly more generous grants p/p than previously. The disappointment has been the ACF, where the number of expeditions dropped from 16 to 10; participant numbers held up, but there were few expeditions of ambition, with the pattern being modest Adventurous Training conducted on the back of Annual Camps or ski trips. P/p support therefore dropped from £68 to £55. We have noted on Page 12 possible factors impeding ACF ambition.

PERFORMANCE

To track performance against Business Plan objectives outlined in last year's Review, we

analyse grants made to each of our beneficiary segments, averages for each, financial implications per participant, and proportions of grants and contributions to overall costs.

The key points to emerge are:

- Our contribution towards cost of Cadet expeditions has increased from 8.7% last year to 10.1%. That increases to 10.9% for community cadet units.
- Nevertheless, the contribution that cadets make to their expeditions (61.2%, but 10% less for community cadet units) remains stubbornly high compared with adult reservists. This is a reflection on both the limits of our financial resources available for Cadets, and their comparatively more limited alternative sources of support.
- Analysis of Cadet grants against Government Indices of Mean Deprivation (IMD) shows that 34.8% of cadet expeditions with 31.2% of participants were from units based in the bottom quartile, and that they received 37.2% of our grants to cadets. This is encouraging evidence that, whilst supporting endeavours regardless of backgrounds, our grants are biased towards areas of greatest need and impact.

The table below summarises our impact for 2015 in terms of the communities eligible for our support. Assuming an average 5 years membership, we are reaching just under 1 in 20 of our community during their time as a member. This falls to 1 in 30 for the Cadet population against 1 in 15 for the Volunteer Reserve.

Our Business Plan aim is to raise our impact on Cadets to that of the Volunteer Reserve, and a key strategy for this is to make opportunities more affordable for Cadets by raising our level of financial support for them, particularly in more deprived areas. Raising the funds to achieve this presently is the Trust's main focus.

Type of Unit	Membership	Number supported	Percentage supported
Volunteer Reserve (VR)	31,260	409	1.31%
University OTC/DTUs	6,590	281	4.26%
Cadets (incl adult instrs)	158,276	1029	0.65%
TOTALS	196,126	1719	0.88%

BEST EXPEDITION AWARDS

Awards for the best Volunteer Reserve, University Officer Training Corps and Cadet expeditions of 2014 were presented during 2015 by county Lord Lieutenants at regional events organised by respective Reserve Forces and Cadet Associations. The winners were:

Best Volunteer Reserve Expedition

HQ 2 Medical Bde (with participants from 12 AMS Reserve Units across the UK) – Ex NORTHERN AORAKI SERPENT– Ski Mountaineering in New Zealand. The 24-strong team, led by WO1 Ashcroft, comprising 15 Reservists and 9 Regulars, undertook an ambitious programme in the New Zealand Alps between 2nd and 23rd August 2014. The Ulysses Trust provided £6375 towards the cost. It followed a selection and training expedition to the French Alps. Some were relative novices before then, and the conditions were often trying. The report extract below reflects the tenor of the expedition:

“On Monday 18th we followed the Treble Cone to Coronet Peak Tour – a grade 2/3 – which proved incredibly challenging for some, as we were required to walk across a particularly narrow ridge before the descent. Several members of the group were pushed well out of their comfort zones: more than achieving the aims of Adventurous Training! Once the day was over and the chance for reflection on the tour was provided, it soon became apparent how much we had achieved and how much we had grown through these challenging experiences.”

WO1 Ashcroft should be congratulated on an ambitious, well-planned and executed expedition which brought credit to the AMS Reserves, and clear benefit to the participants.

Best University Officer Training Corps Expedition Oxford UOTC - Ex BLUE PDG - Ski Mountaineering, European Alps.

The objective of this project was to compete in the Patrouilles des Glaciers - a demanding and challenging ski-mountaineering competition for three-member rope parties. The team, pictured below, led by Captain Tania Noakes and including OCdts Rozzi Martin and Debbie Morgan, became the first all-female Army team and first OTC team to succeed in what is regarded as one of the toughest team events in the world.

They completed the course, which runs from



Zermatt to Verbier and comprises 52km and a 4000-meter positive altitude difference, in 14 hours 21 minutes.

This is only the climax to the story, which started with Tania and 5 female officer cadets undertaking a rigorous training programme throughout the winter, including a demanding 7-day hut-to-hut ski tour in a remote part of the Swiss Alps. The Ulysses Trust granted £600 towards the cost.

The team and Oxford University OTC thoroughly deserve the best OTC expedition award for a demanding, well planned and executed project which concluded with a notable and well-deserved success.



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Best Cadet Expedition

2427 (Biggin Hill) Sqn ATC - In the Footsteps of Lawrence - Exploration and trekking in South Jordan.

This imaginative and unusual expedition was the brainchild of Flt Lt James Dyer, who led a team of 25, comprising 18 cadets (10 under 16) accompanied by 7 reservist and civilian instructors, to retrace the journey of Lawrence of Arabia

through South Jordan. The Ulysses Trust provided a grant of £4000. It was supported also by other benefactors who included the Lawrence of Arabia Society, but the unit also undertook some £7000 of local fund raising. The programme included 2 days desert survival training and a 6-day trek, but also comprised the production of a short film of their experiences and discoveries, and studying extracts from Seven Pillars of Wisdom which they were able to connect to their journey of over 100kms in temperatures up to 42°C.

Flt Lt James Dyer commented in his report:

"The cadets enjoyed the experience and learnt a lot about themselves, expeditioning, experience of a developing world country and the Bedouin culture and the ability to survive in such a hostile environment. The staff found the experience a challenge but with the understanding of the power of overseas expeditions in developing young people and how that fits with the aims of the Air Training Corps, they have also started thinking about the next one!!"

This reflects the opportunities available to cadets led by committed staff at their very best. Both, in this case, are a credit to the ATC, and well deserve the Best Cadet Expedition award for an outstanding project.



"The opportunity to be able to be part of this world renowned event was a real honour. Debbie and I are massively indebted to Tania, who right from the birth of the idea to crossing the finish line, has been an incredible inspiration. Her belief in us has given us the confidence to believe that anything is possible!" OCdt Rozzi Martin's concluding quote in the Ex Blue PDG report.

FUNDRAISING

We should be clear that our *modus operandi* is not to run expeditions ourselves, but to provide the financial encouragement to facilitate others to plan and mount their own expeditions. We believe that there is as much experiential benefit from that as in their actual execution.

It follows therefore that the Trust's ability to raise funds is the bedrock of its existence and that the essence of our service to our communities is to do that on their behalf. We are therefore greatly encouraged by the fact that 2015 is not only our best year of raising funds to date, but that we go into 2016 with a record of pledged income, much of it running into our 25th anniversary in 2017, and beyond.

Our supporters and donors are listed on the opposite page, but we are particularly encouraged by long-standing benefactors increasing their support, in some cases substantially – notably the Nuffield Trust for the Forces of the Crown and the RAF Charitable Trust. A growing number of other supporters are making long-term commitments which greatly assist our longer term planning; these include BAE Systems (our first corporate donor), the Army Sports Control Board Charity, the MacRoberts Trust, the Sir James Knott Trust, the Worshipful Company of Dyers, several Reserve Forces and Cadet Associations, the Berlin Infantry Brigade Memorial Trust, Paul Orchard-Lisle, Julian Radcliffe and the Clive and Sylvia Richards Charity. We are also grateful for a very substantial donation received through the Army Cadet Force Association Charity to provide an annual endowment indefinitely towards grants for Army cadet expeditions.

Donations were also received from a wide range of other individuals and trusts, including the Lord Faringdon Charitable Trust, the Worshipful Company of Armourers and Brasiers, Lord Barnby's Foundation, the Prince of Wales's Charitable Trust, and David Juster. Some support has also come from quite unexpected areas. The Happy Valley Shoot in Buckinghamshire adopted us as their end of season charity in 2015. Another benefactor, retired Colonel David Benest (pictured top right) does a paper delivery round in his local villages, donating his pay to the Ulysses Trust, and collects

further donations from his customers – to our substantial benefit and to the amusement of the Marlborough Gazette & Herald and BBC Radio Wiltshire!



(Image courtesy of Marlborough Gazette & Herald)

The challenge now is to sustain this progress, if we are to achieve our Business Plan objectives for young cadets which depend upon raising an additional £300,000 per year by 2020. We have concluded that this is beyond the capacity of one part-time officer and a small team of volunteers. We have therefore engaged a specialist consultant to review our fundraising potential and strategy. We are now considering its recommendations, but it is clear that we will need to invest in more resources. This will inevitably, at least in the short term, increase our overheads to total expenditure ratio, but this is unavoidable, we believe, if the Trust is to have a meaningful impact in the long term.

We also believe that now is the right time for such investment, and earnestly hope our existing benefactors will support this. Our 25th anniversary in 2017 provides a great opportunity. But, more importantly, youth disengagement and unemployment remains worryingly high. The Government has just established 100 new Combined Cadet Force (CCF) contingents in State schools, with more to follow bringing the total contingents to 500 by 2020, as one measure to address this. The extramural opportunities that we support make a huge contribution to their healthy recruitment and retention, whilst developing the characteristics required for young people to reach their potential as members of society. And it is those individuals most likely to be denied these opportunities on grounds of cost that may most benefit.

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SUPPORTERS AND DONORS 2015

The following is a list of supporters and donors who made grants and donations to the Ulysses Trust in 2015. We are enormously grateful to our supporters and value your commitment to our purpose. We continually strive to ensure that we optimise that commitment in making a difference.

Mark Alsop
Army Cadet Force Association Charity
Army Sports Control Board
BAe Systems
Colonel David Benest OBE
B J Press
Berlin Infantry Brigade MTF
Bryson Corbett Charitable Trust
Capsule CRM
Clive & Sylvia Richards Charity
The Connaught Trust
Cotswold Outdoors
Richard & Rebekah Etherington
The Friends of the Ulysses Trust
Garfield Weston Foundation
Google
Happy Valley Shoot
Simon Heywood
Major Nicholas P Holder
Jeremy Hurst FCIM
Mrs Anthea Hurst
David Juster
Sir James Knott Trust



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Leigh Lodge Centenary Fund
Lord Barnby's Foundation
The Lord Faringdon Charitable Trust
Lowland RFCA
Lady Macpherson of Biallid
The MacRobert Trust
Lieutenant Colonel Philip Neame
The Norman Family Charitable Trust
Nuffield Trust for the Forces of the Crown
Brigadier Paul Orchard-Lisle CBE TD DL
Paul Pelham
Pewsey Vale U3A Military History Group
The Prince of Wales's Charitable Foundation
Col Julian G Y Radcliffe OBE, QVRM, TD
RAF Charitable Trust
RFCA for Greater London
Rotary Club of Marlborough & District
The Royal Society of St George Trust
Colonel Rex Stephenson CBE
Support Command Ltd
Rt Hon Desmond A Swayne TD VR MP
The Worshipful Company of Armourers & Brasiers
The Worshipful Company of Dyers
Wessex RFCA

"From the Pyrenees experience I found my strong points and weaknesses. I found out I was capable of a lot more than I thought I was. The trip has given us all an experience we won't forget. Being involved in this experience has shown me that all you need is determination and you can do anything."

Cadet Corporal M – 234 (City of Durham) Sqn ATC – Trekking – Pyrenees, France

"The sense of achievement, solitude, natural beauty, team spirit and endurance which comes from journeying as part of a team far away from civilisation is a life enriching experience. "

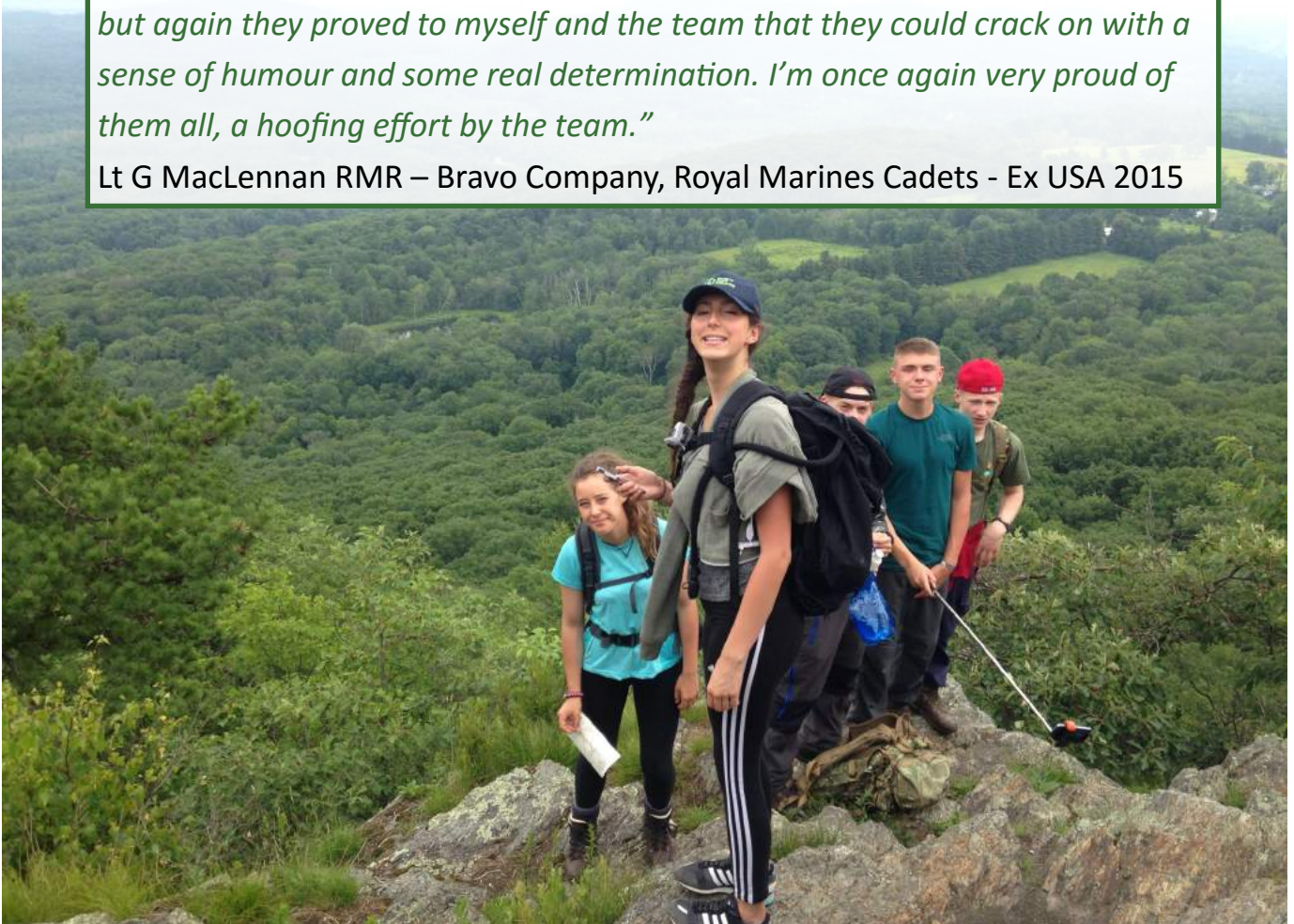
Leading Cadet Jacob H (Milton Keynes Sea Cadets)





"[The Appalachian Trail] proved to be a little daunting for some of the group, but again they proved to myself and the team that they could crack on with a sense of humour and some real determination. I'm once again very proud of them all, a hoofing effort by the team."

Lt G MacLennan RMR – Bravo Company, Royal Marines Cadets - Ex USA 2015



FINANCIAL REPORT

The Ulysses Trust's financial status (awaiting audit) is summarised in the table opposite.

INCOME & EXPENDITURE

The Trust's income amounted to just under £463,000 in 2015, with over £456,000 from Donations. This included an exceptional £250,000 donation through the Army Cadet Force Association Charity for the long-term support of Army Cadets. Trustees have therefore created an Endowment Fund with this, drew down £20,000 for use in 2015, and have invested the balance in the Armed Forces Common Investment Fund run by Blackrock Investment Managers for a number of Service charities. It has, over time, achieved an 8% absolute return per year, and the yield is presently 3.8% - although the usual cautions on investments apply.

The largest source of in-year support again came from the Nuffield Trust, which continues generously to underwrite grants to Volunteer Reserve and University Cadet expeditions to an agreed level, and which in 2015 increased its contribution in view of the anticipated increase in VR activity expected following the drawdown from Afghanistan. The RAF Charitable Trust also continued, and in fact doubled, its much valued support for Air Training Corps (ATC) expeditions. As noted elsewhere, significant new commitments for 3 years were also received from BAE Systems, the Army Sports Control Board Charity (restricted to Army Cadets, and the MacRoberts Trust for specific expeditions selected by us as particularly representing their interests. The result is that the Ulysses Trust has the reassurance of income around £200,000 p.a. pledged for the next 3 years.

The Trust expended nearly £205,000 (after returns) on charitable activities in 2015 with grants approved for 112 expeditions. This was a 13% increase on 2014, most of which was due to the increase in VR activity. More detail is provided in the Operations sector of this Review.

Overheads amounted to £41,582, an 8% increase on 2014. This was due to more spent on marketing and generating funds (£33,406) which is 13% of our total 2015 expenditure and 7% of funds raised. This proportion is expected to increase, however, as we implement the change of gear to our fundraising capacity before dropping back as a return on this is achieved.

Excess of income over expenditure was therefore £216,300, but adjusting for the £230,000 invested in the Army Cadet Endowment Fund, cost of operations exceeded income by £13,827. This has resulted in net assets of £412,297, of which £230,128 is in long-term investments held for the Army Cadet Endowment Fund, and with short-term reserves totalling just some £182,169 of which just over £100,000 is restricted to Cadets.

BUDGET 2016

The Trust policy, taking account of the Army Cadet Endowment Fund and the on-going support of the Nuffield Trust for the VR, is now to hold 6 months of short-term Reserves. In fact, total reserves are 52% of total budgeted expenditure of £342,000 in 2016.

This increase in expenditure sees a targeted uplift of grants for Cadets to £142,000, and increasing our spend on marketing and generating funds to £60,000.

"The overall experience was something else! We learnt so much about history, the outdoors, mountaineering and how to be self-sufficient. It was a great confidence boost. We even cooked and cleaned for ourselves."

Cadet Thomas B (aged 15) - 2344 (Longbenton) Sqn ATC - Operation Vertex -
Mountaineering - Pyrenees



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SUMMARY INCOME AND EXPENDITURE ACCOUNTS 2015

Income	2015	2014
Voluntary Income / Donations	£456,619	£209,117
Bank Interest and Dividends	£3,272	£3,857
Growth in Investments	£128	
Gift aid Tax Recovery	£2,698	£1,500
Total Income	£462,716	£214,474
Expenditure		
VR Grants (incl those on Cadet expeditions)	£93,214	£66,066
University Cadets	£29,350	£35,915
Cadets	£82,270	£79,640
Total Charitable Activities	£204,834	£181,621
Cost of Generating funds	£33,406	£28,845
Governance and Administration	£8,175	£8,624
Total Overheads	£41,582	£37,469
Total Expenditure	£246,415	£219,090
Excess of Income over Expenditure	£216,300	-£4,616
Adjustments		
Repayment of 2013 underspend		£2,150
Transfer to Army Cadet Capital Endowment Fund	£230,000.00	
Net Movement of funds	-£13,827	-£2,466

BALANCE SHEET - 1 Jan 2016

Assets

Fixed Assets

Investments (AFCIF)	£230,128	£0
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Current Assets

Cash	£187,146	£191,411
Debtors	£40,303	£31,463
Total Current Assets	£227,449	£222,874
Total Assets	£457,577	£222,874

Liabilities

Creditors: falling due within one year	£45,280	£26,877
Net current Assets	£182,169	£195,996.58
Total Net Assets	£412,297	£195,997

Made Up of:

Army Cadets Endowment Fund	£230,128	
Cadet Reserve	£101,834	
General Reserve	£80,335	
Total Reserves	£412,297	£195,997

CONCLUSION

The progress we have made with essentially a volunteer team has been substantial. We have clear, ambitious, long-term goals, but are taking a pragmatic approach to reaching them.

That progress, we believe, reflects a growing understanding of our 'added value' over and above the grants that we make. This is on four levels:

- First, directing our funds for the development of young people through the Reserve and Cadet Forces, themselves with a well earned reputation for youth engagement, optimises what we can achieve with our funds. We monitor outcomes, continuously seek to improve these, and thereby continue to improve the impact of our support.
- Secondly, we are the only organisation dedicated to supporting the development of our Reserves and Cadets through challenge and adventure. We have become a focus for, disseminate information on, and promote actively the value and possibilities of these opportunities.
- Thirdly, speedy and flexible responses to requests for support are vital to expedition planners. We provide this through a highly experienced committee with deep understanding of the challenges involved, supported by sophisticated and proven on-line systems processes.
- Finally, by working increasingly in alliance with our benefactors, a number of whom could provide support directly to projects, we can bring together funds from various sources for any one project – making life simpler and more effective for both the donor and the applicant.

No other organisation has the resources and expertise to focus support for such purpose.

Nevertheless, we still have a chasm to cross if we are to make the sort of difference to many more young lives, to which we aspire, by making the opportunities we support affordable to all. The way ahead is not easy, will place increasing demands on our dedicated team, and we will need to invest in our capability to generate income.

Ours, however, is not an investment to correct the ills of the past but, distinctly for a Services' charity, one for the future, based on a belief that what so many young people seek and need is the opportunity – to stretch themselves and their horizons ('margins,' in Tennyson's poem), to measure their true worth, and engage.

While we can measure outputs from our grants accurately and immediately, some outcomes from the opportunities we facilitate are not so easy to measure, and indeed for individual beneficiaries may not manifest themselves fully for many years after. Nevertheless, there is increasing academic evidence that 'character' can be developed, and that exposure to such experiences is important to that.

We hope extracts from expedition reports through these pages will point, at least, to the potential impact we make, and that readers will continue to support or join us in this 'odyssey' to help, in the words of the mother of one beneficiary, 'young people find themselves.'

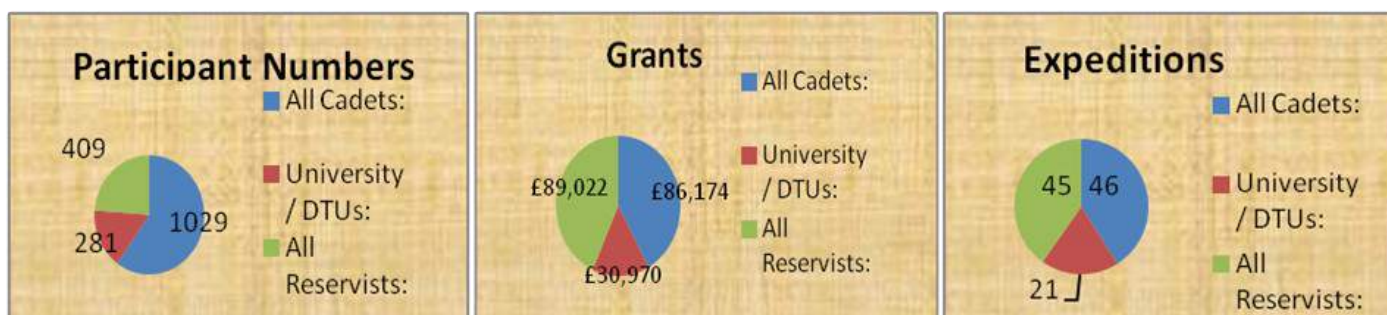
Please direct any enquiries about this Review to:

Philip Neame

Deputy Chairman

philip.neame@ulysestrust.co.uk

2015 AT A GLANCE





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"We value most that which we have fought hard to achieve."

Captain Tania Noakes - Oxford UOTC - Ex Alpine Arc



"Exercise Fistril Folly proved to be very demanding for both staff and cadets. For many cadets this was their first time away from home for a significant period of time. The nature of the demanding and robust programme gave cadets the opportunity to show what they can achieve when given the chance to succeed."

Captain Martin Kitching, Durham ACF

ANNEX TO ANNUAL REVIEW 2015

The following expedition reports are a cross-section of activity supported.



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Ex Fistrall Folly - Post-Expedition Report by Captain Martin Kitching, Durham ACF

Junior cadets from Durham Army Cadet Force had the fantastic opportunity to take part in an eight day adventure training camp in Cornwall, during the October half term holiday on Exercise Fistrall Folly.

The 105 cadets and 19 staff moved into RAF St Mawgan at 0300hrs 24th October 2015, the camp runs parallel to Newquay airport.

“The aim of the exercise was for cadets to develop their personal, social and communication skills as well as build confidence ...”

.. through challenging and exciting adventurous training activities designed to give them the opportunity to succeed. Many of the cadets may never have had the opportunity to experience these activities had they not been a member of the Army Cadet Force.

On the first day of the exercise all cadets were given the chance to become the next Bear Grylls during the survival package laid on by a company called ‘Footsteps to Discovery’ which included shelter building, fire lighting, foraging and water collection. This is the first time Durham ACF have combined adventure training with survival training but being based at RAF St Mawgan, the home of RAF Survival training, then why not. The day proved to be a massive success despite the poor weather and tired cadets, a massive thank you to Spanner and his team of staff for making the day so enjoyable and such a success.

Over the course of the next five days cadets took part in a cultural visit to the Eden Project, a two day adventure training package and an expedition which would see them finish their journey at the iconic Lands’ End for the obligatory ‘sign post’ photo. The expedition which took two days to complete and involving one night in a tent

qualified the cadets to pass the expedition phase of their Army Proficiency Certificate syllabus.

All of the staff and cadets who attended the Eden project were amazed at the variety of plants from around the globe, and humidity within the Mediterranean bio dome. Before leaving the Eden project all participants were able to take part in ice skating, which was enjoyed by all especially watching the instructors’ epic fails.

The adventure training package was as always planned around the local surroundings. The picturesque Newquay coastline was the location chosen for coasteering which involves a combination of climbing, traversing and swimming around the sea coastline. The activity was greeted with mixed reviews before starting but the cadets were ‘buzzing’ and rather proud of what they had achieved at the end of the day. Cardinham Woods, a forestry commission ran tourist attraction which offers fantastic walking and biking trails as well as tasty muffin from the Woods Café was our base for mountain biking and archery.

Durham ACF have invested heavily both in resources and staff to run effective and challenging mountain bike packages for our cadets. The ‘Bodmin Beast’ was an exciting trail that allowed us to explore the wooded slopes of the Cardinham Valley. Cadets encountered a number of technical climbs and descents, snaking single track trail and features such as tight bermed corners, small step downs, rollers and table tops. The trail is exposed to steep unfenced side slopes in places and was an excellent trail for the cadets to practice all of their recently learned skills.

We would like to take this opportunity to thank the Ulysses Trust. Without their help and support this opportunity for these young people would not have been possible.

Ex Peninsular Cadet - Post-Expedition Report by Oakham School CCF

Early on 11th August, 17 cadets from Oakham School CCF departed on an expedition which was to combine an appreciation of two battlefield sites from the Peninsular Campaign with a challenging trek across the Sierra de Gredos mountains of central Spain. The journey took in a 24-hour ferry crossing between Portsmouth and Santander which provided a good opportunity to have the battle pictures explained and reviewed.

The first appointment was at Salamanca in central Spain. Though hot (with cadets walking the battlefield as an acclimatisation element to their main walk), the terrain around this magnificent city was relatively flat. This battlefield was particularly poignant for the contingent as it represents one of the finest hours of the Essex Regiment – a forebear of our current sponsors, the Royal Anglian Regiment. To pay our respects and to mark our visit, the senior cadet laid a wreath before a brief period of reflection. The Arapiles (those hills so central to the battle) now look so beautiful, but every cadet felt a strong sense of just what it would have been like in 1812!

Following a 'preparatory' meal in the main square that evening, the expedition moved to El Barco de Avila – the start point of the trekking phase. For four days the cadets walked some 18 kilometers per day, staying in refugios, seeing outstanding flora and fauna, and experiencing an arduous trek at an altitude not available in the UK (the peaks around their route topped out at over 2,500

metres). Walking slowly at first, as the altitude provided unusual new challenges beyond the scope of our technical preparations in the Durham Dales, the cadets found rhythm on most days and spirit and character when rhythm was hard. At the culmination of the four-day trek in Hoyos Del Espina, every cadet was tired and emotionally drained. They very clearly left nothing behind. The summary of any report of this nature will understandably focus on the physical and technical accomplishments of the cadets, but this expedition made each one dig deeper than they knew they could – adventurous training at its best.

Without lingering to bask in the pride of having finished, the group were quickly on to the next phase of the expedition to Talavera for some community work and another battlefield appreciation. As we dropped down from the mountains the temperature kept rising: 27-28 degrees at first, rising towards 38 degrees within an hour. This was a good moment to stop and to take some time to appreciate how it might have felt to have marched from France to Portugal and back again, fighting huge battles on the way and suffering the most inhumane of conditions whilst doing so. The cadets did not find even this appreciation easy!

Whilst at Talavera, we were able to complete the essential other component of our annual expeditions – community work. The monument to the battle of Talavera is not old, but it is very grand. That said, it is not well kept by the Spanish authorities. With 17 cadets and 5 staff spending





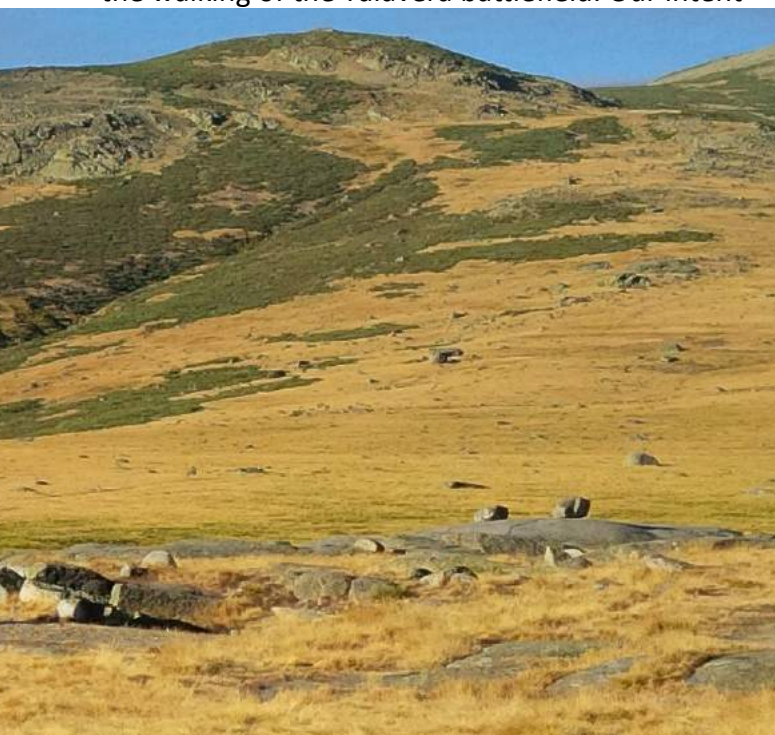
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four hours uprooting self-seeded trees, scrubbing the stains from the stonework and polishing the ceramic tiles, we can justifiably say that we have contributed again to the military family and have appreciated the support we have been lucky enough to secure. Leaving good work behind us has been a theme now across several years and both hemispheres.

The final formal element of the expedition was the walking of the Talavera battlefield. Our intent

as staff was not to reflect every military detail – our combined knowledge, despite research was not up to this – but to illustrate some examples of leadership, bravery and the British Army at its best. If that is a legacy we have left with these cadets, it will have been a worthwhile expedition! Before leaving Talavera, we left wreaths to commemorate the actions of 48th of Foot and the Royal Wagon Train (whose successors now sponsor us).

“What we achieved on this expedition would not have been possible without the assistance of the Units mentioned in this report and of the Ulysses Trust, whose understanding of the value of adventurous training on young, ambitious people makes an invaluable contribution to the success of varied expeditions such as these. 17 cadets have returned knowing a lot more about the Peninsular campaign, about the hardships of the soldier of the early 1800s and, crucially, about themselves! For all who have supported us, we are very grateful.”



Ex Alpine Arc - Post-Expedition Report by Captain Tania Noakes, TA

It is now a month since the final team from Exercise Alpine Arc arrived at the shores of the Mediterranean; successfully completing the final kilometres of an extraordinary ski-journey through the European Alps. A journey which began in Puchberg am Schneeberg in Austria before winding its way through 1100kms of snow-locked mountains; accumulating almost 80 thousand metres of ascent and descent before arriving in Menton 82 days later.

The idea for Exercise Alpine Arc 2015 had been inside me for years. As a Reservist Officer with Oxford University Officer's Training Corps I have organised and run a good number of challenging ski-tours, but it wasn't until I qualified as a British Mountain Guide in September 2013 that I found the courage to commit to organising an expedition of this scale.

The aim of the expedition was for a British Army team to traverse the entire European Alpine chain on skis during one winter season. Such a journey has been completed before by other groups, but never by a Military team regardless of nationality. This would prove a considerable challenge, not just physically and mentally for those taking part but also logistically for those involved in making it happen. The practicality of such a long ski traverse crammed into a single winter meant that the majority was conducted during high winter; those months of the year when the snow pack does not stabilise as quickly due to the colder temperatures which meant the constant concern of higher avalanche risk.

Fortunately I have a very supportive, positive and forward thinking Commanding Officer in Lt Col Simon Mason who right from the conceptual stages of the expedition backed me one hundred percent.

Similarly on the financial side of running a big expedition like this, it was never easy. There were many times when I simply had to have faith that it would all come together somehow, through hard work and inspiring enough people to believe.

Fortunately just at the time the Austrian Army told me that they would have to charge for the use of Austrian Military Mountain Guides, the Ulysses Trust came on board with a firm guarantee of their support for the expedition. Their belief and encouragement has been one of the most positive and uplifting aspects of the whole planning process for me. I cannot thank the Ulysses Trust enough for their firm and substantial backing, unwavering support and shared adventurous spirit!

I was also fortunate to win the support and endorsement of Gen Sir George Norton, who enthusiastically came on board as Patron of the expedition. His firm belief in the value of adventurous training for Service personnel and his quick recognition of the considerable challenge all participants would face helped keep my morale up throughout the 18 months of planning and organisation.

I divided the journey into 11 stages of approximately 8-days duration that ran sequentially through the winter. Each stage was undertaken by a different team of 6 skiers, sometimes from the same unit but mostly formed of individuals from different units. 58 British military personnel took part in; 29 Regular Army, 27 Reservists and 2 from the RAF.

I planned fixed start and finish points for each stage in order to simplify logistics but within each stage the itinerary was flexed to take account of the weather and prevailing avalanche conditions. The expedition was supported on the stages in Austria, Switzerland and Italy by a Mountain Guide provided by the respective host nation military.

The three months of Exercise Alpine Arc 2015 now form such a rich and vivid collection of memories for me that it is hard to know where to begin sharing with you what happened. The hard facts you already know; the distance, the ascent and descent, the days and weeks of effort involved...

And of course we did complete the aim of the expedition, and with fewer significant changes to the itinerary than I had anticipated during the



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“These memories have now become part of who I am and of what drives me forward to meet the future and I’m sure that the same is true of every single person who was part of the expedition.”

Every day I learnt something new; about the mountains or about those around me with whom I shared this unique journey and also at times about myself. This stands out in my mind as the best part of the experience as a whole. I have learnt so much during the course of this winter that it has further opened my eyes on just how rich and varied and amazing a world we live in – and how much is to be gained if only you are prepared to take on the challenge.

planning process. However there is so much more to the expedition left unsaid. So many experiences shared along the way, memories interwoven into such a vast fabric of experiences, and so completely, that it’s difficult now to identify a single thread on its own.

Moments of great beauty now etched in my memory – fragile images of the mountains in the half-light of dawn; the flickering of the wood burner in the winter refuge; a smile shared with friends in recognition of a challenge overcome; wind-blown snow-devils dancing skyward; a signpost heavy with rime ice; the clean line of our skinning track left behind as evidence of our passage through a vast white ocean. The knowledge that not a single trace of our passage now remains...

The physical effort involved and the deep satisfaction of spending three months engaged in a single challenge. The feeling that each day we arrived a little closer to this goal. Sensations of warmth and of cold, of excitement and of fear, of satisfaction, success, of frustration and disappointment. All shared with an amazing group of people who largely arrived not knowing each other, worked hard as a team and left as friends.

It seems true that we value most that which we have fought hard to achieve. Exercise Alpine Arc was for me an unspoken dream which I decided to commit to making real. Of course there were risks involved, not just during the expedition itself whilst skiing in the mountains, but also whilst setting the expedition up. Although I had many enthusiastic supporters who backed the project there were also many individuals who were very negative and saw the project as overly ambitious and destined to fail. This is true to all ambition and all challenges in life.

“Those people who listen to these detractors and are not prepared to take the risk that they may fail to reach their goal accept immediate defeat by not trying. I, for my part, am very glad that we tried and even more satisfied that we succeeded.”



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Patron: HRH The Prince of Wales

This Report is an overview of the support that we provide that makes adventurous training possible for almost 2000 young people throughout the UK every year. Without the support of the Ulysses Trust, many of these expeditions would not have got off the starting blocks. The majority of our income comes from donations from generous benefactors like you and we make every penny count.

If you, your organisation, or your unit, are able to make a donation, organise a fundraising event, or support the Ulysses Trust in any way then we would be delighted to hear from you. Your contribution will make a difference, particularly to those individuals who, without the support of the Ulysses Trust would be financially unable to participate.

Visit our website to find out more or call Jeremy Hurst on 07970 988604 to discuss how you can help to inspire a generation.

www.ulyssestrust.co.uk

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