



# THE ULYSSES TRUST

## *Annual Review 2019*



SINCE 1992 WE HAVE SUPPORTED OVER 37,000 CADETS AND RESERVISTS TO UNDERTAKE EXPEDITIONS AND ADVENTUROUS TRAINING THROUGHOUT THE WORLD.



THE ULYSSES TRUST

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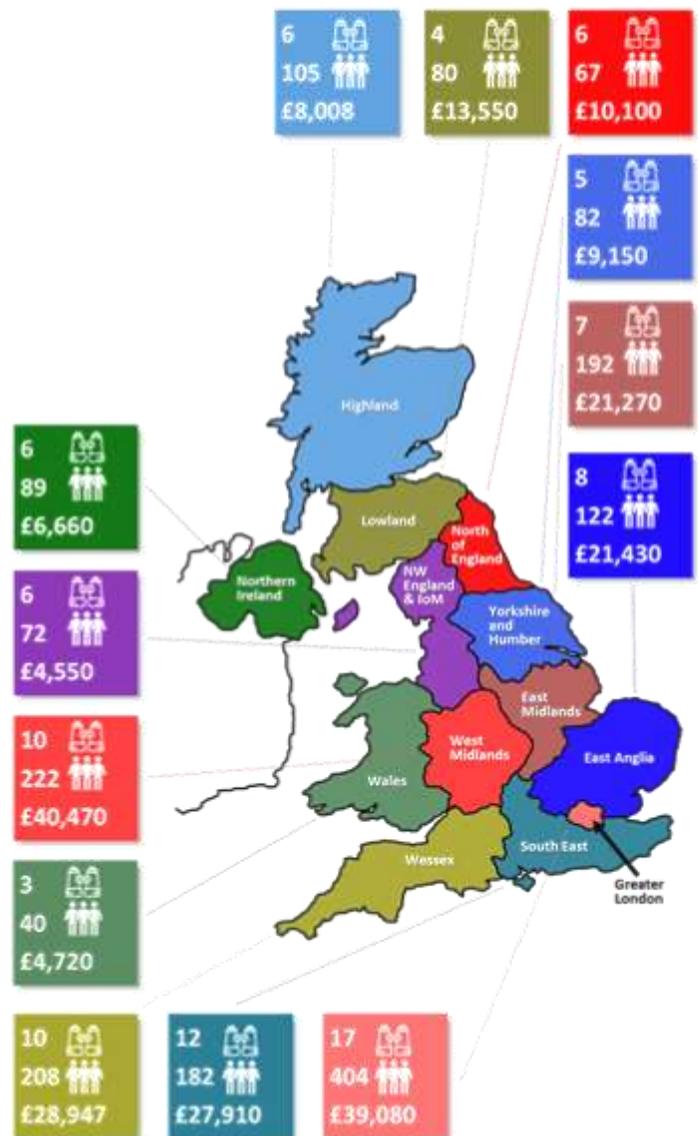
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## BENEFITTING ALL PARTS OF THE UK

Grants reached units in all parts of the UK, as shown on the map below, displaying expeditions supported (🏔️), participant numbers (👥) and grants made, based on Reserve Forces' and Cadets' Association Regions.

100 grants totalling £235,845 were made by The Ulysses Trust in 2019. These supported 1,865 cadets and reservists to take part in adventurous activities.



# FOREWORD



On the whole, it has been another good year for the Ulysses Trust. Our Patron, HRH The Prince of Wales, has renewed his patronage for a further term – which was excellent news for the Charity. Moreover, James Cleverly MP has agreed to become a Vice Patron; James, a reservist, has been involved with the Charity for many years. The Trust is also most grateful for the support from our two ambassadors – explorer Levison Wood and mountain guide Tania Noakes – whose thoughts you can read later on in this Annual Review. On a personal note, once again I completed the Prudential Ride London 100 event in aid of the Trust and raised some much-needed funds for the Charity. I am very grateful to all those who supported my ride.

Looking at income, the Trust has not sustained its previous growth and whilst it is not a cause for significant concern, a formal review of the Charity's fundraising strategy is being initiated. In terms of outgoings, the Trust increased its grants in 2019 by some 9%. Indeed, cadet funding increased and is now moving towards a target of personal contributions being no more than a third of expedition costs on average.

The Charity, nevertheless, believes it is important that there is a personal contribution from cadets as this provides: commitment to the enterprise; an understanding of the value of money - an important life skill; and competence in fundraising – another important life skill.

The Charity is very focused on the outcomes it achieves and this would not happen without units completing a short survey after the respective expedition. To all those who did so, a very big thank you. You will see from the results shown in this Review that we are making a real impact on the individuals participating and providing benefit to the units involved. In addition to keeping a close eye on our outcome measurement results, we look also at the number of cadets who participate in our supported expeditions who come from disadvantaged backgrounds. Again, we are achieving good results here and it is clear that we are targeting our grants for the most inclusive impact. Indeed, following my plea in last year's Review, I am grateful for the increased identification by unit staff of those participants in receipt of Free School Meals – the identifier used to indicate those from more challenging backgrounds.

From external engagement at various events, it is clear that individuals and organisations are more conscious of the Trust and its support. This is good news, both in terms of increasing unit applications for grants and fundraising. Please ask if you would like Trust attendance at your event. On behalf of all our Trustees, I should like to thank all our benefactors. Indeed, without your assistance, we would not be able to contribute to the life-changing development of the UK's young people.

Whilst this Review covers 2019, as we go to print in mid-March 2020 events are invalidating many of our assumptions for the current year. Reserve Forces may find themselves deployed in support of the Civil Power, scuppering plans for expeditions. For other potential beneficiaries, travel restrictions and duty of care requirements are also likely to have a major impact. Perhaps it goes to show the importance of these organisations to the nation when crisis strikes. Arguably, it demonstrates in the longer term the importance of supporting activities that help prepare people to respond effectively to the clarion call when it sounds.

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

# ABOUT US



## OUR MISSION

To provide financial assistance, encouragement and guidance to support challenging expeditions and adventurous activities planned and undertaken by the Volunteer Reserve and Cadet Forces of the United Kingdom.

## THE BENEFITS

- Enhance Unit and Force morale, recruitment, retention and public esteem.
- Help develop the characteristics of leadership, teamwork, confidence, initiative, self-discipline and judgment of its individual members.
- Contribute to society at large.



## OUR VISION

To bring the benefits of undertaking challenging adventurous and community-related expeditions within the financial reach of every member of the UK's Volunteer Reserve and Cadet Forces.

# CASE FOR SUPPORT

## OUR VALUES

Planning and participating in outdoor challenging pursuits develops valuable life skills - including initiative, leadership, self-confidence, judgement, working with others and physical well-being. These can significantly help individuals reach their full potential as effective contributors to their communities, to employers, and as role models within society as a whole.

For all young people, acquiring these skills can be life-changing. This is particularly the case for those from disadvantaged backgrounds and we are committed to providing additional support for such young people by biasing our grants in their favour.

*“The Snow-Camp programme is all about promoting social mobility amongst the most disadvantaged young people. Our Cadets certainly belong to that group and it is having a significant impact on improving their life chances.*

Training Ship Stirling  
Ex: Snow-Camp Venturer Excel 2019

## HOW WE DO IT

We are the only organisation dedicated to supporting the development of our Volunteer Reserve (VR) and Cadet Forces through challenge and adventure. We actively promote the value and possibilities of these opportunities, and each application for our support is reviewed by a team with extensive experience in this field. Applications are appraised both on the project plans and objectives, but also on the benefits that should accrue for the unit and individual participants. The commitment shown and the capacity of applicants to help themselves are also critical factors in allocating grants. Our guiding principle is to help, encourage, enable – but not to spoon-feed.

## WHAT WE HAVE ACHIEVED

Prior to our formation in 1992, adventurous training and expeditions were not on the agenda for VR and Cadet Forces. Cadet activity was modest and primarily UK-based. Expeditions by our VR and Cadet Forces now reach every part of the globe, from the Brecon Beacons to the Poles, providing enriching opportunities of which previously many could only dream.



## WHY THE ULYSSES TRUST?

- We are a focus of encouragement for adventurous training within our VR and Cadet Forces, and can direct funds for this to best effect – support that no other organisation has the processes, systems, and especially the experience to provide.
- We direct our funds for the development of young people through the VR and Cadet Forces, themselves with a well-earned reputation for youth engagement, which further optimises what we can achieve with our funds.
- We can aggregate funds from one donor with those from another in support of a specific expedition. This can significantly increase the impact of each individual donation and, importantly, reduces the fundraising burden for the expedition leader, allowing him/her to focus more on other aspects of planning to ensure a successful expedition.

Together, these make our proposition unique - re-assuring for both beneficiaries and benefactors.

# 2019: A CHALLENGING YEAR

## OVERVIEW

After reporting good progress towards our strategic objectives across all areas in our 2018 Annual Review, 2019 has proved rather more fitful. Encouraging progress in some areas, frustration in others.

Broadly, the Trust's strategy is to grow its capacity to support challenging extra-mural projects and expeditions by the Volunteer Reserve (VR) (including by those serving with one of the various University Officer Cadet schemes) and by the youth engagement Cadet Forces of the UK. The benefits of these projects are outlined in our Case for Support on the previous page, but the scale and reach of our support still limits the overall social impact that the Trust could achieve, especially among young and disadvantaged cadets. Our key objectives are therefore to:

1. Provide sufficient support to cadet expeditions, such that no individual cadet is excluded on grounds of cost.
2. Increase the number of cadets who partake in expeditions.
3. Ensure the Trust's long-term sustainability and relevance through the financial and organisational strength to support VR and Cadet expeditions at the scale required into the foreseeable future.

Growing our capacity is also predicated on the increasing need for such opportunities to maintain the readiness and rigour of our Volunteer Reserves, following the decline of on-going operations, but with a greater dependence on part-time volunteers to meet our defence needs. For cadets, it is the expansion of these Forces, particularly Combined Cadet Forces (CCF) within state schools as part of the Government's Youth Engagement initiatives.

To those ends, the Trust expended £234,144 on charitable activities in 2019, an increase of 9% on the previous year.



## YOUTH ENGAGEMENT - CADETS

With respect to the first two objectives, there are over 156,000 in the Cadet Forces, including volunteer instructors, but only 0.63% per year of these are currently taking part in the opportunities we encourage. This compares with 1.3% of volunteer reservists. As a Continuous Attitude survey of Army Cadets some years ago indicated that adventurous training was the second most attractive activity, one assumes there must be considerable frustration that so few are taking part in expeditions. Five years ago, a survey that we conducted of over 500 cadet units indicated that, despite broad enthusiasm for the benefits, three factors impeded wider take-up: affordability; a complex and over-burdensome approvals and instructor qualification process; and a shortage of cadet adult staff with the experience and confidence to mount expeditions. The report on grants made on page 10 shows that all these issues are now starting to be addressed.

The Ulysses Trust has increased its funding for cadets from 10% of expedition costs at the time of the survey to 16.7% in 2019, with participant contributions dropping from 65% to 47.8% as a result - our objective is to reduce this to 33%, by continuing to increase our level of funding, and encouraging others to help more.

There is, also, evidence that this uplift in grants is indeed achieving greater inclusion. We ask grant applicants from cadet units to say how many participants are on Free School Meals (FSMs) - the most readily available indicator of disadvantage. This can be seen as intrusive, and for some 20% this information is not forthcoming. However, it does enable us to direct more of our limited resources to those in most need. The percentage of cadet participants on expeditions in receipt of FSMs increased from 13.1% in 2018 to 17.8% in 2019. Against the fact that only 12.4% of secondary school students are in receipt, this high level of 'reach out' to disadvantaged young people is gratifying since it is amongst this cohort that the most dramatic impact of these opportunities can be achieved. Of course, this is also a credit to the cadet units themselves, but that in itself is why The Ulysses Trust is happy to focus its belief in the benefits of outdoor challenging pursuits for young people through support of Cadet Forces – they are an exceptionally effective youth engagement organisation through which our grants produce more bang per buck.



Despite this progress, whilst the overall number of applications for grants increased in 2019, expeditions supported decreased slightly because of a significant rise in bids rejected. The number of participants supported was slightly less, principally because of fewer cadet expeditions. More detail can be found at page 9, but this was principally due to a drop in Air Cadet expeditions, following an exceptional 2018 celebrating RAF 100. CCF expeditions were stable, but still disappointing compared with earlier years. Sea Cadet and Army Cadet activity, however, grew significantly. In the circumstances, therefore, we are comfortable, even encouraged, with the outcome for cadets in 2019.

# 2019: A CHALLENGING YEAR (CONTINUED)



## LOOKING AHEAD

For the future, we are optimistic of achieving our objective to expand significantly the proportion of cadets taking part in expeditions. This is not only because of the 2019 results, but also because substantial progress is now being made in respect of the other two impediments identified in our survey - over-burdensome approvals and instructor qualification processes, and a shortage of adult staff with the experience and confidence to mount expeditions. These mainly affected the Army Cadet Force (ACF) and CCFs, who account for some 55% of all cadets. They are the responsibility of the Army's Regional Command, with whom we started a very constructive dialogue two years ago, leading to their commitment to increase ACF and CCF adventurous training and expeditions. After a far-reaching review, significant reforms of the support, training, rules and procedures are being progressively introduced – starting with the ACF. Once bedded in, the CCF should follow. We are already seeing the results with the recovery in ACF expeditions in 2019, and are confident therefore of a recovery in CCF activity to follow.

## THE MEANS

The disappointment of 2019 is that we have not sustained the underlying growth in income that we achieved in 2018, upon which all three objectives in the opening paragraphs are ultimately dependant. The Trust started 2019 with an income of £231,000 of pledged donations, and anticipated commitment renewals and dividend income, but only secured a little over £41,000 from new sources during the year. As a result, the Trust's assets grew by £9,022, thanks only to an unrealised gain of £70,004 on its investments. The operating loss was £60,982. Although, with net assets of £624,227, the Trust is in sound financial health, this is clearly unsustainable in the long term. The return on fundraising costs also dropped from £3.90 to £2.70. The Trust is therefore undertaking a thorough review of its fundraising strategy and costs. It remains committed, however, to ensuring the benefits that follow from the opportunities we encourage and support are within reach of all, regardless of means and backgrounds.

## OUTCOMES

Finally, we continue to survey qualitatively the difference that the Trust makes to the individual development of the participants, to the morale, recruitment and retention of units and to the wider community generally. The results of this research are at page 16, which includes also beneficiaries' perception of the quality and value of our support. The results are highly positive, and encouraging for our volunteers upon whom we rely so much.



# ULYSSES TRUST GRANTS MADE 2019



## OVERVIEW

154 bids were received in 2019, 16 more than in 2018, but the proportion rejected increased from 21% to 33%. Three bids were also withdrawn following approval of grants. This resulted in 100 expeditions being provided grants, 6 fewer than the previous year, although the number of participants decreased by only 2%. The value of grants increased by 8% to £235,845, however, largely because the level of grants for cadets was increased, in pursuit of our objective to ensure that the cadet opportunities are inclusive for all, regardless of means.

The table below provides some detail:

## VOLUNTEER RESERVE & UNIVERSITY OFFICER CADETS

Looking at the component parts of the table, there was a strong recovery in the number of Volunteer Reserve expeditions, but the numbers participating declined slightly. Smaller expeditions however are better - arguably more beneficial to the individuals, with a lower imprint on the environment. University Cadets, from a weak 2018, made a strong recovery, with 43% more expeditions in 2019, and 72% more participants. Grants to these more than doubled, reflecting a resurgence in ambition and more enterprising expeditions resulting in greater expedition costs. This was potentially as a result of a briefing by one of the Trust’s volunteers at a UOTC Commanding Officers’ conference at RMAS Sandhurst early in 2019. The University Air Squadrons have, in particular, become much more active.

*“This was an arduous physical trip and we had some severe conditions... the OCdts had to dig deep on many occasions and I believe they found resilience they did not know they had.”*

Southampton UOTC

Ex: SUOTC NORWAY CHALLENGE 2019

Unit type	Exped.	Adults	Cadets	Total Nos	Grants	Per person	Per Exped	Reject & Cancelled Bids	Total Bids	Grants/ Bid (% approved)
ACF	11	74	217	291	£40,850	£140	£3,714	8	19	58%
Sea	7	28	137	165	£30,745	£186	£4,392	2	9	78%
ATC	11	56	163	219	£37,250	£170	£3,386	7	18	61%
CCF	11	66	235	301	£28,000	£93	£2,545	2	13	92%
All Cadets	40	227	762	976	£136,845	£140	£3,421	19	59	69%
UOTC + DTUs	22	368	0	368	£47,010	£128	£2,137	10	32	66%
Army	32	401	0	401	£48,990	£122	£1,531	20	52	65%
RNR/RMR	6	120	0	120	£3,000	£25	£500	4	10	70%
RAuxAF	0	0	0	0	£0	£0	£0	1	1	0%
All Reservists	38	521	0	521	£51,990	£100	£1,368	25	63	65%
Totals	100	1,116	762	1,865	£235,845	£126	£2,358	54	154	67%

# ULYSSES TRUST GRANTS MADE 2019 (CONTINUED)



## CADETS

Fewer cadet expeditions is the main cause for the overall decline in numbers involved, but the picture is a little mixed. Air Cadet (ATC) expeditions reduced by 38% and participants by 26%; however, 2018 had been an exceptional year with Air Cadets pulling the stops out to celebrate RAF100. Combined Cadet Force (CCF) activity was stable, but this remains at a sadly low level compared with 5 years ago. We still assess that CCFs are finding it simpler to undertake expeditions under civilian and Duke of Edinburgh approvals, than negotiate the Ministry of Defence approvals process. Happily, Regional Command have determined to address this handicap. We are confident that this, allied to the growth of CCFs in state schools as part of the Cadet Expansion Programme will result in strong growth here over 2 to 3 years. On a more positive note, Sea Cadets have maintained their strong growth of 2018 which, with more ambitious expeditions, resulted in a significant increase in grants to them. Finally, the recovery in Army Cadet Force (ACF) activity detected at the end of 2018 has continued in the last year, and again the wide-ranging review and reforms being undertaken by Regional Command to improve the support and approvals process for Army Cadet expeditions is particularly encouraging. We anticipate continued growth in demand here also.

## REJECTED APPLICATIONS

The increased number of bids rejected has caused us some concern, but perhaps, as we become more widely known, it should be expected. A number were rejected because applicants have quite simply not provided the information requested in a way that makes sense, and a number of these were addressed by a successful re-submission. The Operations Director puts considerable time into helping these. Sadly, some asked to re-submit were not heard from again. We want bids to succeed.

Many, however, just did not meet our criteria, described in some detail in guidance to applicants on our website – either they have not read or understood them, or they were trying their luck. The fact is that events such as the Nijmegen March and other sporting competitions (such as downhill ski races or participating in road races) may sometimes be seen as adventurous training by the Ministry of Defence, but cannot, even with the most liberal interpretation, be considered expeditions.

A significant proportion were rejected essentially because the 'expedition' is nothing more than a package holiday provided by a commercial operator at a ski or a Red Sea diving resort. The Grants Applications Committee is alive to the fact that, in some circumstances and programmes, and especially for cadets, this is unavoidable. It does, therefore, approve grants where the case is made, or there were clear developmental benefits to individual participants or the unit.

Finally, we do expect participants, except cadets identified as struggling to do so, to put some meaningful skin in the game. Applications where the Trust's contribution appears to be little more than recreation were swiftly rejected. Invariably, therefore, even though our ethos is to encourage and approve bids, much depends upon the thought and care that has gone into an application.

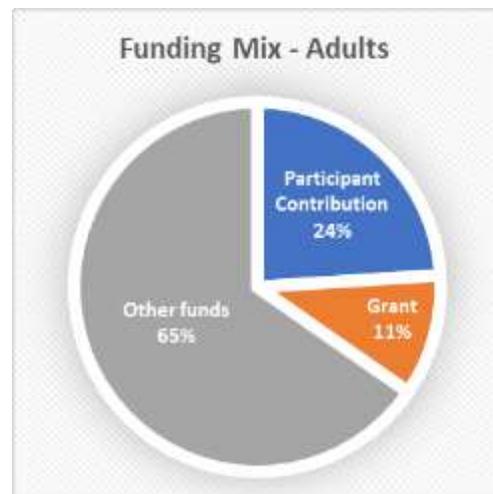
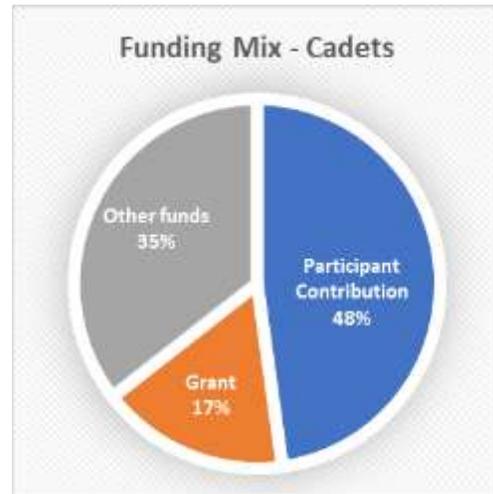
## IMPACT OF GRANTS – MEASURING THE DIFFERENCE

We continue to monitor closely the difference that our grants make to our beneficiaries. In addition to the data at page 9, we track the contribution our grant makes as a proportion of the overall cost of a proposed expedition. More importantly, we track the proportion of total cost that has to be found by the participants because, especially for cadets, this is the true indication of affordability.

As noted on page 7, we are making steady progress (15% improvement on the previous year) towards our target of reducing participant contributions from Cadets to an average of 33%. This, however, delivers more than just improved inclusivity; it is also encouraging greater ambition. Moreover, we are seeing that a given increase in average Trust contribution brings about, not an equal, but a greater reduction than that in participant contributions. This strongly suggests that a grant from The Ulysses Trust endows credibility and can encourage others also to donate more to a particular project.

We grant funds to expeditions, not individuals, so that the Expedition Leader can direct funds towards those in greatest need. The charts right show the differing burdens borne by cadets against adult reservists.

Meanwhile, as noted also on page 7, monitoring and factoring the proportion of participants on Free School Meals (FSMs) into our allocation of grants shows that we are reaching, and directing limited funds to, those of greatest need and where we potentially have the greatest impact. 12.4% of secondary school children receive FSMs. When expeditions had more than that percentage of cadets on FSMs taking part, our grants were on average 43% higher than to those below that. As a result, the average contribution from each cadet on expeditions with more than the benchmark on FSMs fell to £293, in contrast to those with more paying an average of £453. Our average grant to expeditions with more than the national benchmark on FSMs was 43% more than those with fewer.



We are sometimes asked whether we should only support those on FSMs. There are two reasons why we do not. First, many expeditions then would not take place at all, whether with disadvantaged cadets or not. Secondly a core value of the experience is cadets of very different backgrounds sharing the challenges and hardships of an expedition together – raising the aspirations of some and broadening the social awareness of others.

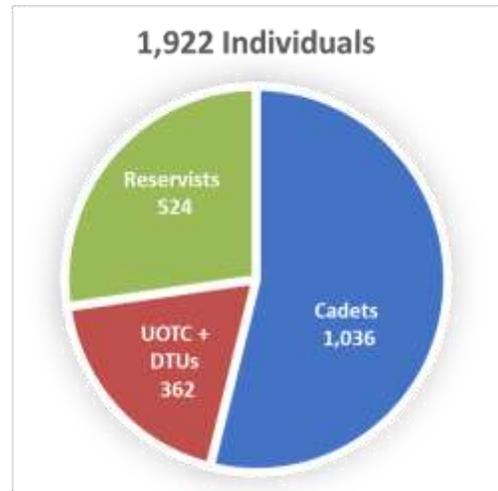
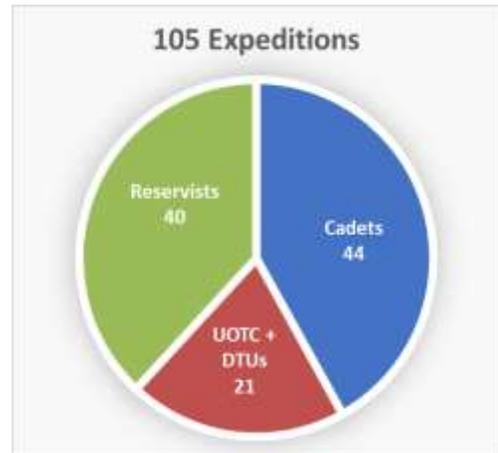
Further details about the difference we are making, and how we measure this, can be found on pages 16 & 17.

# EXPEDITIONS DEPLOYED WITH TRUST SUPPORT 2019

## WHERE AND WHAT

A total of 105 Ulysses Trust supported expeditions deployed in 2019, two more than in 2018, with 1,922 participants, almost 100 more than in 2018. These were supported by grants of £247,316, an increase of just over £45,500 on the previous year.

The charts to the right show the significance of cadets in the mix of support that the Trust provides— whilst those below summarise the mix of activities and the global reach of these expeditions.



(Authorisation of Grants for expeditions always precedes their deployment, so the figures, showing expeditions actually completed, differ from those for Grants authorised on preceding pages.)

# A MESSAGE FROM OUR AMBASSADORS

## LEVISON WOOD

Levison Wood is a British explorer, writer and photographer who has published six best-selling books and produced a number of critically-acclaimed documentaries which have been aired around the world.



Expeditions are an incredible way for young people to develop confidence, trust and knowledge about themselves. The Ulysses Trust shows that with hard work and perseverance cadets can develop new skills and aptitude. Expeditions help bond teams together and through good leadership and organisation participants get to experience adventures and develop camaraderie.

The opportunity to push themselves and to learn in testing environments is of huge worth in the cadets' development as future leaders and ambassadors for the Armed Forces. I truly believe that adventurous training enables youngsters, no matter what their background, to help achieve their full potential and to become more adaptable and resilient individuals. In doing so they can be better prepared for any challenges that life throws their way, and to help others do the same. I wish all participants on Ulysses Trust expeditions the very best and safe travels.

## TANIA NOAKES

Tania Noakes lives and breathes adventure. As well as being an UIAGM Mountain Guide, Tania was the first British woman to complete the "Norge På Langs", an 82 day solo ski journey travelling the entire length of Norway.



Over the years I have participated in, and led, many expeditions supported by the Trust. I have witnessed first-hand the impact and character-shaping benefits adventurous training can have on a team and individuals. These experiences play such a crucial role in building teamwork skills and organisational ability. They help build resilience, perseverance and flexibility in the face of setbacks and nurture a positive mind-set which helps get things done.

As an ambassador, I am also interested in the impact that the Trust has on the units it supports. The results of the latest feedback survey confirmed what I have always felt, that the Trust continues to play a pivotal role in aiding a unit's recruitment, retention and morale. The Trust continues to do a fantastic job in supporting our Volunteer Reserve and Cadet Forces and bringing these life-changing opportunities within their reach.

# PRINCE OF WALES'S EXPEDITIONARY AWARDS

Each year The Ulysses Trust presents three awards for the best expeditions in the following categories - Cadet Forces, University Units and Volunteer Reserve Forces - to highlight the very best in leadership, challenge, courage and planning.

It is not necessarily the grandest expeditions that are selected. Awards are based on a judgment of how well the expedition has matched the Trust's objectives (see pages 4 & 5).

Each of the award-winning units receives a unique certificate signed by The Ulysses Trust's patron, HRH The Prince of Wales.

Further details about each of the award-winning expeditions can be viewed in the Expedition Reports section of our website at: [www.ulyssesrust.co.uk](http://www.ulyssesrust.co.uk)



*"This was the first time I had been away from home this long before as well as the furthest, having never left the country before. I feel much more confident in my abilities and also feel more resilient in everything I do."*

Cadet Katie Bradbeer | Ex: Tiger Venturer Matravers 2019



## CADET CATEGORY

**Exercise: TIGER VENTURER MATRAVERS 2019**  
**Unit: Matravers Combined Cadet Force (CCF)**  
**Location: Mercantour National Park, France**

Matravers CCF is a new cadet unit, formed in 2017 under the Government's Cadet Expansion Programme. This state-funded school has a high percentage of disadvantaged pupils and the cadets who took part in this expedition all came from this cohort.

Tiger Venturer Matravers 2019 was the unit's first overseas excursion and one that the Trust was delighted to support. The cadets trekked through France's Mercantour National Park by snowshoe which enabled them to explore the undulating terrain with minimal training.

The expedition demonstrated that adventurous activities can make a huge difference to the lives of young people from all backgrounds. It also pushed the unit to a new level by taking on a challenging, overseas expedition.



In August, 11 students and three mountain bike instructors deployed to the remote Mongolian countryside, to cycle 680km across deserts, steppe, and mountains in an expedition entitled Mongolian Endurance.

The expedition was made up of three stages, starting with a three-day ride across the Gobi Desert to the Khongoryn Els sand dunes. Stage Two took them to the Arts Bogd mountain range, cycling 70km a day through mountains, dried-out river gorges and unending steppe. The final stage was spent in the Khangai mountains – a combination of rolling hills and a winding river.

This ambitious and physically challenging expedition has had a significant impact on the unit, boosting morale and bolstering recruitment and retention.

## UNIVERSITY CATEGORY

Exercise: MONGOLIAN ENDURANCE 2019  
Unit: East of Scotland Universities Air Squadron  
Location: Mongolia

*“Ex Mongolian Endurance was a genuinely surreal experience, with a tremendous sense of accomplishment upon completion. It was genuinely inspiring to see our team work so efficiently together... and so I am thankful for the opportunity.”*

Officer Cadet Fraser Briton | Ex: Mongolian Endurance 2019



2019 marked the centenary of the scuttling of the German High Seas Fleet in Scapa Flow after the end of the First World War. Divers were encouraged to visit and dive the multitude of wrecks and salvage sites to commemorate the centenary.

Five reservists deployed to Scapa Flow in October providing less experienced divers with an ideal opportunity to develop their skills and improve some of the more technical aspects of deeper and longer diving such as decompression procedures.

Diving in a dry suit in the colder UK waters is a skill in itself. The reservists had to cope with the dark waters in Scapa Flow pushing them beyond their comfort zones. An excellent example that great adventures can be found close to home, minimising travel costs and environmental impact.

## RESERVIST CATEGORY

Exercise: NORTHERN SCAPA TARTAN 2019  
Unit: 51st Highland, 7th Battalion The Royal Regiment of Scotland  
Location: Orkney

# OUTCOME MEASUREMENT—MAKING A DIFFERENCE

This is a summary of the 101 survey responses from the 105 expeditions that deployed in 2019, supported by The Ulysses Trust. The responses were provided by the expedition leaders and Commanding Officers of the participating units who completed our post expedition survey. The response rate was 96%.

**99%**  
Positive Impact  
on Individuals



**93%**  
Positive Impact  
on Units



**89%**  
Satisfied with  
Service



**35%**  
Positive Impact  
to Society



Our survey said: **67% major** positive impact on most of the quoted characteristics, **32% positive** impact on the majority of the quoted characteristics and **1% modest** impact on one or more of the quoted characteristics of leadership, teamwork, confidence, initiative, self-discipline and judgement.

*“Massive impact on promoting self-confidence, personal development and leadership ... numerous young people helped by the Trust have gone on to highly successful service careers.”*

Budmouth College Combined Cadet Force  
Ex: Trans Andes 2019

Our survey said: **51% major** positive impact on all 3 of the quoted areas, **42% positive** impact on all 3 of the quoted areas and **7% modest** impact on 1 or more of the quoted areas of recruitment, retention and morale.

*“The use of adventurous training as a morale, recruitment and retention tool in the UAS domain is the single most beneficial tool in the arsenal.”*

Cambridge University Air Squadron  
Ex: Blue Plunge 2019

We asked if Ulysses Trust staff provided encouragement, demonstrated flexibility and gave timely responses to questions. Our survey said: **67% strong** in all aspects, **18% positive** in most aspects, **4% some positive** aspects, **10% no specific positive or negative** attributes and **1% deficient** in one or more areas.

*“This is the first time I have used the Trust and it has been very supportive and helped a lot.”*

3 BN The Princess of Wales's Royal Regiment  
Ex: Tiger Dalmatian 2019

We asked about any potential impact of the expedition on other parts of society, for example, teaching or construction projects or other activities stimulated by the expedition experience. **35% made an observation** or provided a positive comment on the impact to other parts of society, **65% did not**.

*“The expedition built a chicken coop for a local family. From the extra money earned... the family would be able to send their two children to school. “*

Herts & Bucks Wing ATC  
Ex: Jungle Hart 2019

# FUNDRAISING

The Ulysses Trust is very fortunate to have had the support of a number of long-standing benefactors. In 2019 the support of the Nuffield Trust for the Forces of the Crown exceeded expectations and enabled support to some 60 Reservist and University Officer Cadet expeditions. The RAF Charitable Trust provided funds to 11 Air Cadet expeditions. We are also very grateful to all those other funders who have supported us on a regular basis for a number of years, notably: Sir James Knott Trust; The Lord Faringdon Trust; The Prince of Wales's Charitable Fund; The Cadogan Charity; Army Sport Control Board; Clive & Sylvia Richards Charity; Armourers & Brasiers Company; Dyers Company; Julian Radcliffe, and the Reserve Forces and Cadet Associations for Greater London and Wessex.

Nevertheless, in 2019, fundraising has proved challenging for The Ulysses Trust. Along with many other charities, we are finding that demand on grant-making trusts increasingly exceeds supply, as the impact of austerity is felt – a substantial grant from the Anton Jurgens Trust being a welcome exception.



There have been some brighter moments.

Our Chairman, AVM Nick Kurth, once again stepped up to the plate...or, rather, the pedals....and took part in RideLondon 2019, raising £1,400 in the process. The weather was kinder this year and, happily, Nick avoided getting drenched as he had the previous year.

Nearly twenty years ago David Pinchard, a school friend of our Vice Chairman, started a network of interim managers – Transformation Leaders. Transformation Leaders adopted The Ulysses Trust as their chosen charity at their Annual Dinner in 2019, raising several thousand pounds for the Trust. A huge thank you to David and his members, and we are delighted that they wish to continue this relationship through to their 20th anniversary.

Finally, you will be familiar with the saying 'large oaks from little acorns grow'. Perhaps David Benest, who has been mentioned in previous dispatches, had this in mind when, some 6 years ago and fully retired, he started a paper-round to make life easier for those based in a number of neighbouring villages in East Wiltshire. He donated his earnings to The Ulysses Trust. His customers have joined in, many also making donations to the Trust. In 2019 the money David has raised passed the £10k mark. We suspect David had no idea when he started pounding the pavements that his efforts would bear such fruit. We are truly grateful, and also delighted to note that David was short-listed as a Wiltshire Life Local Hero of the Year award, in recognition of this and his pro bono work for his local community.

So, our challenge as we enter the 2020s is to develop a strategy to encourage more Davids, Nicks, and other individuals, more RFCAs and more trusts to help us raise sufficient funds to enable us to increase the impact that we can make on the lives of young cadets - particularly those from disadvantaged environments.

# SUPPORTERS AND DONORS

The following is a list of supporters and donors who made grants and donations to The Ulysses Trust in 2019.

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.

Anton Jurgens Charitable Trust  
Army Sports Control Board  
Clive and Sylvia Richards Charity  
Colonel David Benest OBE  
David Blanchard  
Major Nicholas P Holder  
Neil Kerr  
Leigh Lodge Centenary Fund  
Philip Neame  
Nuffield Trust for the Forces of the Crown  
Perivan  
Colonel Julian G Y Radcliffe OBE QVRM TD  
RAF Charitable Trust  
RFCA Greater London  
RFCA Wessex  
The Armourers and Brasiers' Gauntlet Trust  
The Cadogan Charity  
The Lord Faringdon Charitable Trust  
The Sir James Knott Trust  
The Worshipful Company of Dyers  
The Worshipful Company of Tobacco Pipe Makers and Tobacco Blenders  
Transformation-Leaders.com  
E C and S A York

We are also extremely grateful for the generous support of all those who sponsored our Chairman AVM Nick Kurth who completed the 2019 Ride London-Surrey 100.

**THANK YOU.**



## 25TH ANNIVERSARY APPEAL

As part of the celebrations of the 25<sup>th</sup> Anniversary of The Ulysses Trust, we launched an Appeal to raise £1.5 million by the end of 2021 in order to increase significantly the amount of support we can give cadet expeditions. These extra funds will help us to:

- Reduce each cadet's contribution.
- Reach out more effectively to those from more disadvantaged backgrounds or environments, for whom these opportunities can be the most transformational.
- Double the number of opportunities for cadets.

With this financial boost we aim to make a difference to over 2,500 young people every year. You can find out more about the 25<sup>th</sup> Anniversary Appeal via our website at [www.ulysses trust.co.uk](http://www.ulysses trust.co.uk)



# FINANCIAL REPORT

## INCOME & EXPENDITURE 2019

The Ulysses Trust's financial status at end-2019 (based on unaudited accounts) is summarised in the table opposite.

Total Operating Income for 2019 was £274,942 (excluding unrealised capital gains on Fixed Assets), against £393,836 in 2018, but the latter included an exceptional one-off donation of £125,000 (including Gift Aid). Nevertheless, this was 28% below budget, as the targeted growth in donation income disappointed. Underlying revenue therefore remained broadly static.

Donations amounted to £246,955, mainly from grants made by other Trusts and Foundations. £205,843 of this sum came from long-term commitments and pledges. The largest source of these was the Nuffield Trust for the Forces of the Crown, which continues generously to underwrite grants to Volunteer Reserve and University Officer Cadet expeditions. It was again followed by that from the RAF Charitable Trust, which funds much of our support for Air Cadets.

Other termed commitments and regular pledges, identified in the Fundraising Report, contributed a further £60,000. These commitments are vital to the Trust's ability to plan ahead and provide confidence to those planning expeditions that there will be support.

Total expenses amounted to £335,924 in 2019. Of this, £234,144 was on charitable giving, an increase of 8% on 2018, for 100 expeditions. The increase was largely due to increasing the level of support for cadets, in line with our Business Plan, to enhance inclusivity – the number of cadets on Free School Meals participating increasing by 36%. Core running costs of £101,780 were slightly less than 2018, and as a proportion of overall expenses, decreased by 3% to 30%, but were 1% above budget.



The above resulted in an operating deficit of £60,982 against a surplus of £70,198 in 2018. Despite drawing down £20,000 from capital, however, Gains on Investments of £70,004 meant a positive Net Movement of Funds of £9,022.

The total Net Assets of the Trust now amount to £624,227 of which £569,959 is comprised of fixed assets. Of these, £267,955 is restricted for the long-term support of Army Cadets, and the balance of £302,004 is designated to a fund for the long-term development of the Trust. Donations received and other income restricted to cadets was £54,090 less than actually expended on cadets. This shortfall was covered by the Cadet Reserve Fund which accordingly decreased by £18,615 to NIL, and by £18,389 from the General Reserve. The latter decreased to £54,268. With the Nuffield Trust committed to underwriting our budget for the Volunteer Reserve, this represents 3 months of other costs.

## BUDGET 2020 AND BEYOND

The Trust is budgeting £233,500 on charitable activities in 2020, similar to its expenditure in 2019. This does, however, include a modest increase in grants for cadets. This and core running costs will be reviewed in light of its review of fundraising strategy due to be completed by July 2020. Assured income is some £250,000.

# ACCOUNT SUMMARY

## ULYSSES TRUST - SUMMARY ACCOUNTS 2019 (UNAUDITED)

Operating Income	Restricted	Unrestricted	Total	2018
Voluntary Income / Donations	£180,054	£66,901	£246,955	£345,970
Legacies				
Bank Interest and Dividends	£10,638	£14,844	£25,483	£20,606
Gift aid Tax Recovery		£2,504	£2,504	£27,260
<b>Total Operating Income</b>	<b>£190,692</b>	<b>£84,249</b>	<b>£274,942</b>	<b>£393,836</b>
<b>Operating Expenditure</b>				
VR (incl VR instrs on Cadet expeditions)	£76,172	£0	£76,172	£68,955
University Cadets	£38,615	£0	£38,615	£23,815
Cadets (excluding VR Instructors)	£94,520	£24,837	£119,357	£122,619
<b>Total Charitable Activities</b>	<b>£209,307</b>	<b>£24,837</b>	<b>£234,144</b>	<b>£215,389</b>
Cost of Grant Making		£7,469	£7,469	£15,147
Cost of Generating funds		£91,354	£91,354	£88,437
Governance and Administration		£2,957	£2,957	£4,665
<b>Total Running Costs</b>	<b>£0</b>	<b>£101,780</b>	<b>£101,780</b>	<b>£108,249</b>
<b>Total Expenditure</b>	<b>£209,307</b>	<b>£126,617</b>	<b>£335,924</b>	<b>£323,638</b>
<b>Excess of Operating Income over Expenditure</b>	<b>-£18,615</b>	<b>-£42,368</b>	<b>-£60,982</b>	<b>£70,198</b>
Gains/Losses on Investments	£32,911	£37,093	£70,004	-£53,018
<b>Net Movement of Funds</b>	<b>£14,296</b>	<b>-£5,275</b>	<b>£9,022</b>	<b>£17,180</b>
<b>BALANCE SHEET - 1 Jan 2018</b>				
<b>Fixed Assets</b>				
Investments	£267,955	£302,004	£569,959	£517,826
<b>Current Assets</b>				
Cash	£615	£71,788	£72,403	£115,823
Debtors	£34,241	£2,699	£36,940	£34,653
<b>Total Current Assets</b>	<b>£34,856</b>	<b>£74,487</b>	<b>£109,343</b>	<b>£150,476</b>
<b>Liabilities</b>				
Creditors: falling due within one year	-£53,245	-£1,830	-£55,075	-£53,096
Transfer of Unrestricted to Restricted Funds	£18,389	-£18,389	£0	
<b>Net Current Assets</b>	<b>£0</b>	<b>£54,268</b>	<b>£54,268</b>	<b>£97,380</b>
<b>Total Net Assets</b>	<b>£267,955</b>	<b>£356,272</b>	<b>£624,227</b>	<b>£615,206</b>
<b>Made Up of:</b>				
<b>Capital Funds</b>				
Army Cadets Fund	£267,955			£235,044
Future Development Fund (Designated)		£302,004		£282,796
			£569,959	£517,840
<b>Operational Reserves</b>				
Cadet Reserve	£0			£18,615
General Reserve		£54,268		£78,750
<b>Total Reserves</b>			<b>£54,268</b>	<b>£97,365</b>
<b>Total Funds</b>	<b>£267,955</b>	<b>£356,272</b>	<b>£624,227</b>	<b>£615,205</b>

# CLOSING COMMENTS



*“The expedition had an impact on all Cadets on a personal level with their development, especially their confidence, self-discipline and teamwork.”*

Ross-on-Wye & Monmouth Sea Cadet Unit  
Ex: TS Jack Petchey 2019

We make no apology if cadets continue to dominate in this Review. The report on outcomes on pages 16 & 17 provides many examples of the growth and development of individuals that flow from enduring, striving, sharing healthy risk and achieving together in challenging conditions – and yes, sometimes even not succeeding in an objective, but always learning. This is true of our Volunteer Reserves as well, but cadets are the future. Investing in them is an investment also in the communities from which they come, and society generally.

We remain concerned that we still need to do more to help facilitate these opportunities for them. Despite significant progress, the costs to cadets themselves can still be discouragingly high – particularly for those from disadvantaged environments. Those on Free School Meals, moreover, are reportedly four times more likely to be excluded from schools than others. Especially in these days of ersatz experience and relationships found in the physical isolation on social media, for these young people, minds can be opened, hopes and aspirations raised, horizons redefined by the opportunities we help to enable. These, then, remain our main point of effort.

Hopefully, we have shown that working with the cadet organisations is a highly effective way of reaching out to these, integrating them with more fortunate peers, and enabling them to share the benefits. However, it is perhaps worth noting that the Trust has invested many years of volunteer effort developing the processes, systems, and not least the experience for appraising expedition applications, allocating funds fairly to where most deserved – both in terms of need and anticipated outcomes – and then analysing outcomes rigorously in a search for ongoing improvement in the support we provide.

Moreover, the volunteers of our operations team, spread increasingly across the country, provide significant encouragement and guidance to units signing expeditions – something regularly commented on in our outcomes surveys.



Arguably, therefore we bring distinctive value to optimising the benefits of outdoor challenging pursuits to young people. We are well aware that a number of our benefactors could provide funds directly to many of the projects and groups that we support, but they choose to do so through the Trust for this reason.

When we reviewed our mission and developed a Business Plan to achieve that five years ago, we suggested that we had set ourselves some demanding goals and that the journey may not always be straight and smooth. We have tried to be honest and open on where that journey is going well and where it is more choppy. Our rallying cry, however, remains that of the founding expedition to Everest in winter of 1992, when at times there was doubt that the project would ever leave the UK: "Aim high, perchance ye may achieve!"

With help from both our beneficiaries and our benefactors, we will...

*To strive, to seek, to find, and not to yield.*



### THANK YOU

This Review has kindly been printed for The Ulysses Trust free of charge by **Perivan**.

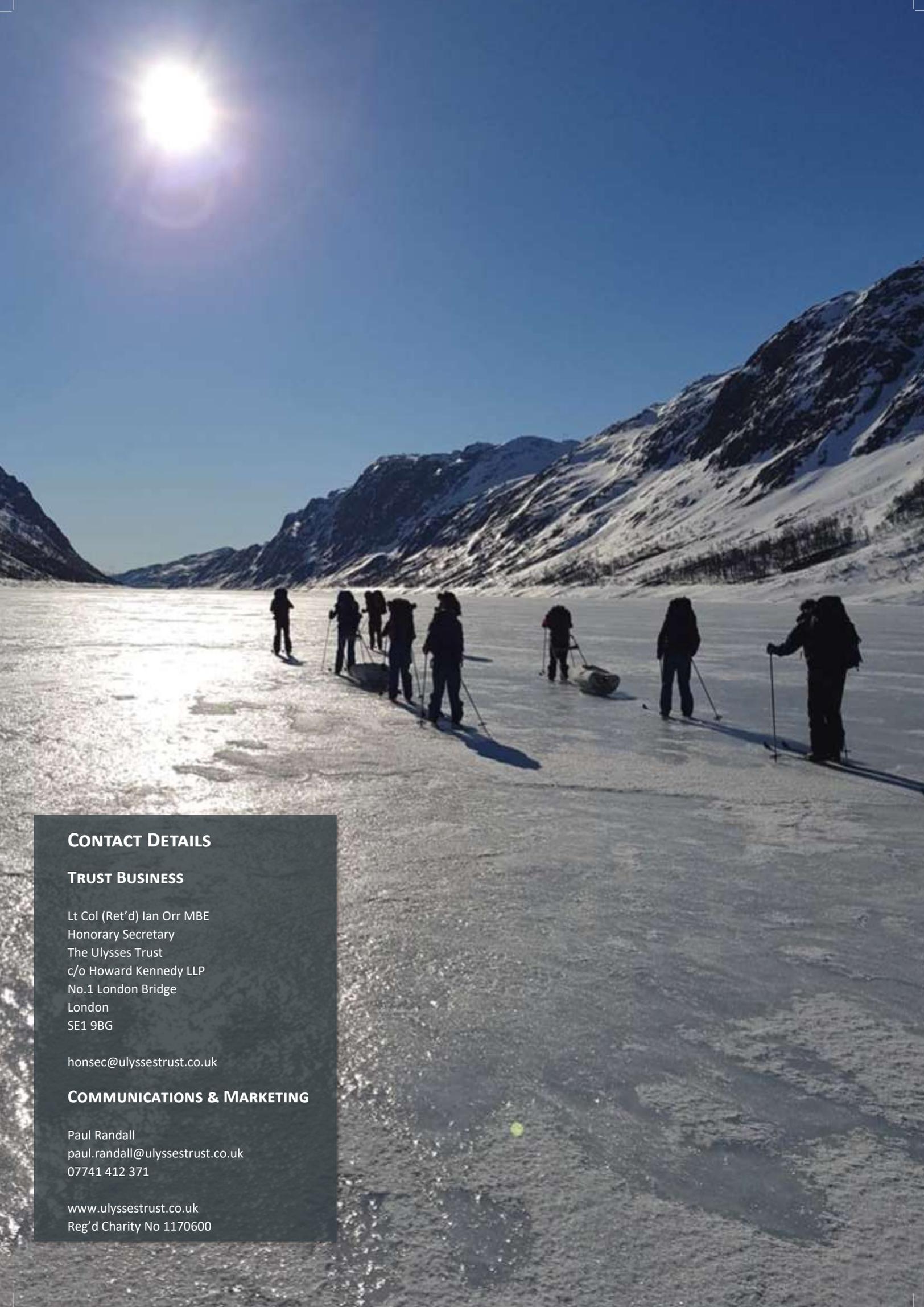
### WANT TO FIND OUT MORE?

Please direct any enquiries about this Review to:  
Philip Neame | Vice Chairman  
[philip.neame@ulyssesrust.co.uk](mailto:philip.neame@ulyssesrust.co.uk)

## EXPEDITIONS 2019



Summary of where the 105 expeditions of 2019 took place: 19 UK | 57 Western Europe  
5 E Europe and Russia | 4 Africa | 8 N America | 5 S & Central America | 5 Asia | 2 Rest of World



## **CONTACT DETAILS**

### **TRUST BUSINESS**

Lt Col (Ret'd) Ian Orr MBE  
Honorary Secretary  
The Ulysses Trust  
c/o Howard Kennedy LLP  
No.1 London Bridge  
London  
SE1 9BG

[honsec@ulyssestrust.co.uk](mailto:honsec@ulyssestrust.co.uk)

### **COMMUNICATIONS & MARKETING**

Paul Randall  
[paul.randall@ulyssestrust.co.uk](mailto:paul.randall@ulyssestrust.co.uk)  
07741 412 371

[www.ulyssestrust.co.uk](http://www.ulyssestrust.co.uk)  
Reg'd Charity No 1170600