



THE ULYSSES TRUST

Annual Review 2020



SINCE 1992 WE HAVE SUPPORTED OVER 37,185 CADETS AND RESERVISTS TO UNDERTAKE EXPEDITIONS AND ADVENTUROUS TRAINING THROUGHOUT THE WORLD.



THE ULYSSES TRUST

FOREWORD



As I write this Foreword, the country is in its third lockdown and there is no immediate sign that expedition activity will be resumed. Last year started well on the expedition front and then deployment stopped. That said, the Trust team was delighted to support a number of field hospital units with their expeditions before they provided military aid to civilian authorities. Also, there have been some very innovative activities undertaken by the cadets during lockdown - this has been fantastic to see.

The charity conducted a lockdown survey with the cadets and one of the key conclusions was that 97% of those surveyed saw adventurous training as key to re-energising the unit after lockdown finishes. Indeed, the charity is aware of a number of units who have started planning UK-based expeditions, which are easier to mount and are not subject to potential border issues. Accordingly, the Trust needs to be ready to assist.

Rather than shutting up shop during the pandemic, the charity has taken time to consider the way forward. The Trustees were keen to do two things: provide more and larger grants to cadets, and ensure the sustainability of the Trust in the future. To do this, the largest campaign in the Trust's history has been launched. It has been called, 'New Horizons', and is being steered by a Campaign Council, whose engagement is most welcomed. Please do contact the charity if you would like to know more. To benefactors, please accept a huge thank you from all the Trustees; without your support, many young people would not have the benefit of these life-changing expedition experiences.

In addition to initiating the campaign, the Trust team has undertaken a number of other activities. For several years, significant focus has been placed on looking at the outcomes from our support and during the last 12 months work has been undertaken identifying the longer term impact of that support. Case studies have been developed to reflect this and two are shown in this Review. The Trust is most grateful to the respective units who assisted with this work. Furthermore, policies, especially relating to improving our relationships with our benefactors, have been put in-place to assist the campaign.

The Trust puts great store on its annual expedition honours - The Prince of Wales's Expedition Awards. Indeed, each award certificate is signed personally by our Patron, HRH The Prince of Wales. Owing to the low number of expeditions in 2020, due to the pandemic, the Trustees decided to roll all the expeditions that did take place in 2020 into 2021, for joint consideration. A further result of the pandemic has been that only one of three 2019 Awards has been presented; hopefully, this will be resolved as soon as lockdown is completed.

The charity is very grateful to female mountain guide Tania Noakes and explorer Levison Wood for continuing to be our Ambassadors. Also, long time supporter, Paul Orchard-Lisle, has agreed to become a Vice Patron; he provided some key chairmanship at the start of our campaign planning phase.

To finish, the charity is standing-by to assist reserve and cadet unit expeditions, believing that adventurous activities will be instrumental to helping young people as the country emerges from the pandemic. As our Patron said, 'It is the young people who have lived through the toughest experiences who have most to offer back to society'.

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

MISSION, BENEFITS AND VISION



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.

THE NEED

The Ulysses Trust was born out of a ground-breaking attempt in 1992 by the Territorial Army to achieve the first British winter ascent of Mt Everest. Expeditions have a significant impact on individual development and on unit morale, but they are not funded by the public purse, and can be the most costly aspect of the cadet or reservist experience. Indeed, in 1992 expeditions were not even on the agenda for Volunteer Reserve (VR) and cadet forces. Today they reach every part of the globe, from the Brecon Beacons to the Poles, providing enriching opportunities of which previously many could only dream. Over 28 years, we have raised over £3.3m to help some 2,880 expeditions, benefitting over 37,185 individuals.

SOCIAL IMPACT

Planning and participating in expeditions develops valuable life skills including initiative, leadership, self-confidence, judgement, working with others and physical well-being. These characteristics can significantly help young people reach their full potential as effective contributors to their communities, to employers, and as role models within society as a whole. Such opportunities are also an important reason why young people join the VR and cadets, so they significantly contribute to unit morale, recruitment and retention – a virtual circle, more members and more acquiring these valuable characteristics.

For cadets especially, not only are they a valuable aspect of youth engagement, but young people from very different backgrounds sharing challenges and hardship together means expeditions are among the most effective vehicles to help social mobility, cohesion and inclusion.



OUR VALUES

We are particularly focused on the benefits of these opportunities for those cadets from disadvantaged backgrounds and the difference our support can make for those units in highly deprived areas. For many individuals the opportunities can be life-changing.

This is where The Ulysses Trust steps in. We provide additional support to units across the UK so that they can deploy expeditions in the UK and overseas at a price that is within reach to all. This is reflected in our grant-giving and we continue to provide extra support to those who need it most. This is achieved by uplifting our grants for expeditions that include cadets from disadvantaged backgrounds so that limited family income does not prevent cadet participation.

Quite simply, we strive to help build confidence, strengthen communities and change lives.

* These figures (see left) relate to secondary school FSMs statistics.



42% of the new cadet units are in areas of high deprivation.



24% of cadets who participated in expeditions supported by The Ulysses Trust are in receipt of Free School Meals (FSMs) – almost double the national average.*

HOW WE DELIVER

We are the only organisation dedicated to supporting the development of our 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 not only 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.

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. These organisations have 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.

TIMELINE

- 1992** Established as Reserve Forces Ulysses Trust (RFUT). First grant made to support Ex DARC STAR – Territorial Army attempt at first British winter ascent of Mt Everest.
- 1993** HRH The Prince of Wales transfers his patronage from DARC STAR to the RFUT. First grant applications invited from VR. First fundraising appeal.
- 1996** To meet demand, Trust Deed amended to include cadets.
- 2002** 10th Anniversary celebrated with Patron, HRH The Prince of Wales, at Highgrove.
- 2004** Minerva IT system launched for speedy on-line processing of grant applications.
- 2008** RFUT passes its first £1m of grants.
- 2009** Name changed from RFUT to The Ulysses Trust, recognising cadets now accounted for as much of Trust support as VR.
- 2011** The Ulysses Trust Best Expedition Awards launched.
- 2014** Trust revises grant application process to include information on numbers on FSMs, ensuring inclusivity of and better support for cadets from disadvantaged backgrounds.
- 2015** The Best Expedition Awards renamed in honour of the Trust's Patron, as The Prince of Wales's Expedition Awards.
- 2016** Trust initiates outcome and impact measurement.
- 2017** The Trust appoints two Ambassadors, Levison Wood and Tania Noakes, as it celebrates its 25th Anniversary.
- 2019** The Trust's grants for VR and cadet expeditions passes £3m since first established, having supported nearly 2,900 expeditions and over 37,000 individual participants.
- 2020** The New Horizons fundraising campaign launched to uplift support of cadet expeditions.

2020: LET'S MOVE ON...!



A NEW CHALLENGE

It will come as no surprise that 2020 has been a disappointing year for The Ulysses Trust. We had plans significantly to increase our capacity so as to encourage more cadet expeditions, and enable more cadets, regardless of background and means, to benefit from these experiences. These plans have been unavoidably set back by the pandemic, as a review of our operations on page 8 shows. The pandemic has, of course, affected everyone: it has not only denied potentially life-changing benefits to our beneficiaries, but also impacted the ability of some of our benefactors to support us.

From the perspective of our potential beneficiaries, however, the year has been little short of disastrous. 788 young people saw their expectations of many months of preparation dashed, without experiencing the rewards of the expeditions for which they were planning. For cadets, it may have been their first or only chance to expand their horizons and possibly change their lives, particularly for the 36% who were on Free School Meals.

The front cover of this Review features an Air Cadet expedition to Borneo to climb Mt Kinabalu, the highest mountain in Southeast Asia, and to help with a building project for a village nearby. This expedition took place before the first lockdown, but to give a measure of how much these opportunities mean to cadets and the commitment they make, it is instructive to consider an extract from the application for a grant that we received (see box).

"We have one cadet whose family provide specialist fostering care for children with Special Educational Needs or those from an otherwise difficult background. Much of the family income is spent on ensuring a suitable environment is provided to these foster children. There is no financial support available to the cadet from parents. However, the cadet has taken on a part time job around their school studies. In addition to this they have written to local hardship funds held by parish and local council. They have also been ever present at team fundraising events.

We also have a cadet whose parents have separated within the last year. There is little to no financial support from parents, as the family income now has to fund two residences. This cadet has taken the lead with fundraising events, especially in organising stalls at local fetes where the cadets fundraised."

Plt Off George A C Allbut RAFAC | Herts and Bucks Wing ATC

Imagine, after similar struggles, the disappointment for those whose expeditions then had to be cancelled. Consider also what else these cadets have lost: no weekly training at their cadet unit - a social haven for many; their schooling blighted; no physical contact with friends. As Lord Hague observed:

"For many currently in school or college, the months of education that have been lost can never be replaced. This is particularly true of those from disadvantaged backgrounds, lacking the facilities and home environment to learn away from school. ... [They] will be the prime victims of a looming catastrophe. So this generation is in for a very hard time, and they need rescuing quickly. ... the whole of society should be invited to join a new kind of civic duty to ... the challenge faced by young people."

Here at The Ulysses Trust it is our firm belief that the 'expedition experience' can meaningfully help compensate - at least for the personal development that young people have lost.

We decided we could and should accept this challenge. We can make a difference.



COVID-19 IMPACT SURVEY



90% SAID EXPEDITION PLANS HAVE BEEN DISRUPTED BY COVID-19.



77% ARE MAKING EXPEDITION PLANS FOR AFTER LOCKDOWN.



97% SEE ADVENTUROUS TRAINING AS KEY TO RE-ENERGISING THE UNIT AFTER LOCKDOWN.

In 2020 we conducted a survey to determine the impact of the pandemic on expedition plans. 40 units responded.

- Long-time recipients of this Review will be aware of our concerns that the complexity of Army regulations and processes for cadet expeditions was inhibiting expeditions by the community-based Army Cadet Force and schools-based Combined Cadet Forces (CCF), comprising 55% of all cadets. The Army has now completed an extensive review and is introducing substantial changes.
- The Cadet Expansion Programme which led to the establishment by 2020 of 250 new CCF contingents, all in state schools, is expected to increase the number of cadets by 15,000 by 2025. Almost half are in what government defines as highly deprived areas.

LOOKING BEYOND THE CRISIS

In addition to that identified by Lord Hague, the crisis has brought two further challenges that engagement with our beneficiaries has made clear:

- After months of effectively being dormant, units of the VR and cadet forces will face real challenges of morale, recruitment and retention. There is serious concern that individuals (cadets and volunteer instructors) will have lost the habit of regular attendance. They will need exciting programmes to regenerate momentum, and adventurous training and expeditions are vital ingredients. This was evidenced in our COVID-19 Impact Survey detailed above. However, specialist qualifications for instructors will also need refreshing, which will incur additional costs in courses for in-house instructors or in the short-term contracting with external providers.
- Many cadets, or rather their parents who actually pay for these extra-mural activities, and many volunteer instructors will be facing severely straitened times. Affordability will become an even more pressing issue, just at the time that these opportunities are more vital than ever.

Two other factors, not connected with the pandemic, will also substantially increase activity that we support as we emerge from the crisis:

The combined effect of these changes will mean that more expeditions will be seeking our help.

Finally, the Trust remains committed to its strategy for ensuring the opportunities it encourages are inclusive of all cadets, regardless of means and backgrounds. Increasing its level of funding for cadet expeditions, from 17% of expedition costs in 2019 to an average 33%, will reduce the share of costs borne by participants from 48% in 2019 to some 20%, at least for those on Free School Meals. That will also lead to more cadets taking part – specifically, those who stand to benefit the most.

The Trust is determined to meet this increase in need. This is made more urgent by the challenges facing units and their individual members as they emerge from lockdowns.

To these ends, the Trust decided to launch a new fundraising campaign. Encouragingly, many potential donors are looking beyond the crisis, to what needs to be done as we emerge from it. Most readily see the strength of our case.

Thanks to the continuing and indeed fulsome support of the Nuffield Trust for VR and university officer cadet expeditions, we are able to focus our campaign exclusively on the expanding and urgent needs of cadets. The campaign seeks also to transform the Trust's resilience, so that it can confidently sustain consistent levels of support over the long-term. See page 13 for further details.

OPERATIONS

2020 started with such promise. Before the first COVID-19 lockdown, we had agreed grants to a value of just over £150,000 for 52 expeditions. The contribution we made to the cost of cadet expeditions had increased from 17% to 23%. This was a big step forward in our strategy to improve inclusivity by lowering the contributions that the cadets were required to make.

In the event, only six expeditions deployed (compared with 105 in 2019). The rest had to cancel, leaving 788 individual dreams in tatters. More than twice that will have been disappointed over the year, as projects yet to apply for a grant were aborted. Of the six that deployed, all before 17th March, three were cadet expeditions benefitting 92 young people, two were Army Reserve and one Royal Navy Reserve with 36 participants between them. All but one were overseas. One gratifying note was a Red Sea diving expedition by 2 Medical Brigade - squeezed in before some of the team were called up in support of the emergency response to the pandemic.

The table below, of grants from 1 Jan to 31 Dec 2020, further summarises the frustrating year.

Of the 43 grants approved in 2020, only nine have not been cancelled. Two were among the six deployed before 2020 lockdown, the remaining seven due to deploy in 2021. However, five have overseas destinations and remain at risk of cancellation.

GRANTS APPROVED 2020

Unit type	Exped.	Total Nos	Grants	Per person	Per Exped
ACF	0	0	£0	£0	£0
Sea	0	0	£0	£0	£0
ATC	1	12	£2,400	£200	£2,400
CCF	2	85	£7,000	£82	£3,500
All Cadets	3	97	£9,400	£97	£3,133
UOTC+DTUs	1	40	£5,720	£143	£5,720
Army	4	43	£24,050	£559	£6,013
RNR/RMR	1	5	£250	£50	£250
RAuxAF	0	0	£0	£0	£0
All VR	5	48	£24,300	£506	£4,860
Totals	9	185	£39,420	£213	£4,380

Some had, however, been in gestation before the pandemic struck, and the leaders are understandably keen to cling to their hopes for as long as possible.

Sadly, with so little activity, the Trust decided that, to retain their integrity, The Prince of Wales's Best Expedition Awards should not be made. The handful of 2020 expeditions will be included for consideration in the 2021 awards. Equally, with so little data, it has not been possible meaningfully to report against our key performance indicators for the last year. This data will also be absorbed into that for 2021.

Despite the lack of expedition activity, the Trust has not been idle. It has strengthened the integrity of its IT systems, with an emphasis on business continuity in the event of the unavailability of key people. In the absence of normal communication with expedition leaders around plans, activity and outcomes, we have improved the two-way flow of information with them by a number of multi-media initiatives. This has, importantly, enabled us better to understand the impact of the pandemic on cadet units, their expedition plans and future needs. Finally, we have reinforced the Grants Applications Committee with two new members. Paul Edwards MBE recently retired from the Regular Army in the rank of Colonel. His last appointment was Head of Cadets Branch at Regional Command. He is also a Fellow of the Royal Geographical Society and an avid mountaineer. Sqn Ldr Mike Blakey MBE is the Air Cadets Overseas Expeditions Advisor, and has led many cadet expeditions.

The outlook for 2021 remains opaque, particularly the prospect for expeditions overseas. The UK, however, can provide many very worthwhile adventures and challenges, where restrictions are likely to lift significantly earlier, and with a very much shorter lead-time from inception to execution. We are, therefore, very much encouraging units in this direction, and stand ready to support these, flexibly and wholesomely, to regenerate activity, unit morale and individual benefits. There could be no better time for expedition planners to apply for a grant.

OUTCOME AND IMPACT MEASUREMENT

Most expedition activity in 2020 was disrupted by COVID-19. We received six out of a possible seven outcome measurement survey responses and 21 individual comments. The results are as follows, with a selection of these comments:

100% POSITIVE IMPACT ON INDIVIDUALS

Our survey said: **50% major** positive impact on most of the quoted characteristics and **50% positive** impact on the majority of the quoted characteristics of leadership, teamwork, confidence, initiative, self-discipline and judgement.

COMMENT: *“The value of the expedition in regard to the personal development outcomes is immeasurable.”* Cadet Centre for Adventurous Training | Ex: Dragon Venturer Canski 2020

100% POSITIVE IMPACT ON UNITS

Our survey said: **50% major** positive impact on all three of the quoted areas, **50% positive** impact on all three of the quoted areas of recruitment, retention and morale.

COMMENT: *“The publication of the expedition on social media and cadet publications most definitely assists in the recruitment. Retention and morale go hand in hand with the cadets that have attended and then spreading the message of their activities and achievements.”* Shropshire ACF | Ex: Snow Cub 7 2020

100% POSITIVE IMPACT TO SOCIETY

We asked about any potential impact of the expedition on other parts of society, for example construction projects or other activities stimulated by the expedition experience, such as local voluntary activities. **100% made an observation** or provided a positive comment on the impact to other parts of society.

COMMENT: *“The volunteering work the team carried out benefitted the local community in Costa Rica a great deal.”* 282 (East Ham) & 338 (West Ham) | Ex: Barra Honda 2019

84% STRONGLY SATISFIED WITH OUR SERVICE

We asked if The Ulysses Trust staff provided encouragement, demonstrated flexibility and gave timely responses to questions. Our survey said: **84% strong** in all aspects, **16% positive** in most aspects.

COMMENT: *“When the original plan to Namibia was cancelled at short notice, leaving many issues to resolve, the encouragement and help provided by Ulysses Trust officers to make a new plan and carry on through the residue was like a ground anchor to me. The Ulysses Trust were responsive, helpful and re-assuring. Many thanks.”* NRHQRA and HQ Woolwich Station, 207, 243 Fd HOSP, AMS | Ex: COCKNEY STRANDLOPER - SOUTH AFRICA 2020

REFLECTION AND LEARNING

Reflecting on the outcome and impact measurement results, the Trust has learnt that:

- The benefit secured for those individuals from disadvantaged backgrounds participating in our supported expeditions is immense. As a consequence, the charity will continue focusing on this.
- Whilst it is clear that we are providing a strong level of encouragement and assistance to units, the Trust needs to continue monitoring the service that is being provided in order to see what can be done better.
- There is significant value in collecting feedback and testimonials from cadets and their parents, and this will be continued in the future.

2020 provided an opportunity to reflect and gain a better understanding of the long-term impact of our funding on the units we support and the cadets and reservists who take part in expeditions. Overleaf is a selection of case studies that investigate the impact of the expedition experience.

CASE STUDY #1

CASE STUDY

282 (East Ham) Air Cadets



In December 2019, 282 (East Ham) embarked on an adventure of a lifetime to The Barra Honda National, Costa Rica. During the exercise 16 cadets built an education facility, undertook conservation work and experienced living in the jungle. This was the expedition following an exercise in the Brecon Beacons a few months earlier, involving 39 cadets. These deployments were part of a succession of five expeditions organised by the unit and supported by The Ulysses Trust.

What makes these accomplishments even more impressive is that the majority of the unit's cadets live in Newham, East London, one of the most deprived areas of the UK. Many cadets come from single-parent families on very low incomes. Without additional financial support, such as that provided by The Ulysses Trust, these young people would never be able to access these life-changing opportunities. Expeditions have been identified as a key factor in the unit's continuing success and popularity. Commanding Officer Sqn Ldr Chris Booty commented:

BOOSTING MORALE *"Expeditions, whether they're in the UK or overseas, are one of the most popular activities 282 squadron undertakes. It gets the most interest from cadets, provides a wide variety of activities and is a big morale booster."*

SUPPORTING RECRUITMENT *"Being an inner-city squadron, the chance to undertake adventurous activities is limited. The ability to undertake new challenges motivates the cadets and encourages others to join."*

AIDING RETENTION *"Staff find it hard to stop cadets attending when they 'age out' at 20. Many have continued to support the unit as adult volunteers or have moved on to help run neighbouring units."*

In summary, The Ulysses Trust's support has had a significant impact on this cadet unit.

KEY POINTS

- ✓ 282 (East Ham) is based in Newham, East London, one of the UK's most deprived areas.
- ✓ Over half of the cadets supported on recent expeditions come from low-income families.
- ✓ The Trust has supported 98 cadets & 39 adult volunteers from this unit to deploy on five expeditions in the UK and overseas since 2011 with grants totalling £17,150 underwritten by the RAF Charitable Trust.

"The expedition experience has proved to be incredibly valuable in the development of these young people who have such hard challenges in life compared to other young people living elsewhere in the UK."

Sqn Ldr Chris Booty

CASE STUDY #2

CASE STUDY

Tile Cross Academy Sea Cadets



With support from The Ulysses Trust, cadets from Birmingham's Tile Cross Academy's Sea Cadet unit, TS Stirling Sea Cadets and other accompanying units have taken part in a total of seven expeditions. This has enabled over 100 young people, most facing significant disadvantage and poverty, to benefit from outdoor activities in the UK, USA and Italy. The impact on the young people, unit and school has been significant.

This was recognised when Tile Cross Academy won the school/college category of the Social Mobility Awards 2020. Neil Mackintosh, Head of Social Mobility at Tile Cross, commented: *"The skills and personal qualities developed by these experiences are acknowledged to be drivers of social mobility and without the support of the Trust they would have been beyond the financial reach of our pupils/cadets."*

Here are two of many examples:

CADET A: Originally from Pakistan, Cadet A has suffered family breakdown and turmoil. This resulted in him being split-up from his siblings and placed into foster care. Cadet A took part in a UK-based exercise supported by the Trust which aided his development.

CADET E: Cadet E is the eldest of three children and a young carer to her siblings and single mother (who is deaf). Being a young carer has put significant pressure on her whilst growing up. However, Cadet E has found solace and opportunity in the cadets and with our support, travelled to the USA in 2019. *"This expedition will forever stay with me as a reminder of my achievements and successes. It has showed me how you have to put in the hard work and collaborate with others, but also have trust and faith, to excel in life."*

The expedition experience played a crucial role in helping both cadets earn fully-funded 110% bursaries at independent boarding schools, which otherwise would be well beyond their reach. This will improve their prospects further and demonstrates the transformational effect expeditions can have in aiding social mobility.

KEY POINTS

- ✓ The school is located in one of the 150 'Left Behind' areas - attainment levels for children are lower than average and the gap is widening.
- ✓ 49% of the cadets supported were in receipt of Free School Meals.
- ✓ The Trust has supported 105 cadets & 23 adult volunteers from this unit to deploy on seven expeditions in the UK and overseas since 2017 with grants totalling £21,156.

"Sea Cadets has equipped me with resilience, self-belief and social confidence. Sea cadets made me feel more in charge of myself, enabling me to overcome challenges more confidently."

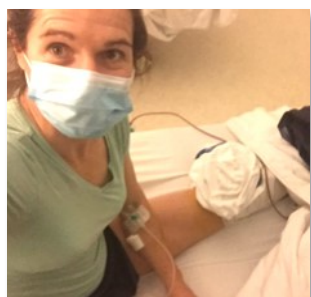
CADET A

A MESSAGE FROM OUR AMBASSADORS

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.



discipline to exercise daily; resilience to push through pain; single-minded focus to recover as much as I was able to, and the determination to pick myself up again and again.



This year has been difficult for all of us. It has challenged me too, but not in ways that you might immediately imagine. I have been in hospital for the first time in my life, fighting and

recovering from a serious knee infection. Six months on, and I am exploring and adjusting to my changed body.

2020 has been a huge step into the unknown, unlike all my other adventures. I did not face my situation well at first: usual coping mechanisms unavailable; emotions overwhelmed me; pain, vulnerability and fear intensified through lack of ownership. I became an unrecognised version of myself, broken and despondent about my future.

Supported by medical staff and friends, time passed, and I began to heal. Used to perpetual motion, I found the process unbearably slow and yet some of my habits began to pull me through:

These uncertain times have challenged us all, and we emerge into 2021 changed. We have had to be patient with our dreams of adventure and face adversity much closer to home. Difficulties remain, but survival in a changing world requires that we ourselves change, and through our survival that we develop resilience. This, after all, is one of the founding tenets of adventurous training.

My mother always advised me that when things didn't go quite as I'd hoped, “to save the grain of gold and move on”. Although I do not believe things happen for a reason, we can strive to make the best from the worst. In fact, at times perhaps it is the worst that creates an opportunity for us to be our best. So, stay positive, keep connected and support each other. We will move past this time of restrictions, and when we do, I for one will be holding firm my grain of gold and realising a new adventure.

LEVISON WOOD is a British explorer, writer, photographer and Army Reservist who has published seven best-selling books and produced six critically-acclaimed documentaries which have been aired around the world.



Recently I was privileged to talk with several cadets online about their hopes and aspirations and I was deeply impressed by the fortitude and strength of character demonstrated.

The last year has been a test of patience and resilience for us all. I know that I for one have found it hard with the absence of travel and I understand that it is frustrating for many young people, particularly those whose expeditions have been delayed or cancelled. But I urge everyone to stay positive and focus on a bright and hopeful future.

Let's take this time to plan ahead and come up with some great ideas for expeditions both here in the UK and, hopefully, overseas when the time allows. That way we can all look forward to getting back outside and enjoying the wilderness once again in the company of our friends. I very much look forward to seeing you all on the road again soon.

FUNDRAISING

The Ulysses Trust is preparing to meet the challenges of vastly increased need for its support by undertaking a major fundraising campaign.

Elsewhere, we outline the significance of the dramatic success of the Cadet Expansion Programme and of the devastating effect that the pandemic has had on cadet activity. Units have been largely dormant, and many young people have lost the habit of regular engagement. The Trust conducted a poll of some 40 units to find out how significant the pandemic has been on expeditions. Fully 90% said expedition plans have been disrupted while 97% saw adventurous training as key to restarting activity once restrictions have been eased.

Taking these two unprecedented factors into account, the Trust recognised that it must double its annual income to £500,000, enabling it to make more grants to meet increased demand and to make larger grants to support the growing number of disadvantaged young people becoming involved in the cadets.

In the summer of 2020, a specialist consulting firm, Morgen Thomas Ltd, was commissioned to undertake a review of the Trust's fundraising and to develop a strategy to meet these objectives. It recommended a major fundraising campaign, conducted over two years, aimed at securing £2.5 million in pledged gifts and grants over the next five years.

The campaign was planned in the autumn, under the leadership of Brigadier Paul Orchard-Lisle, a new Trust Vice Patron, and substantial supporter of the Trust over many years. Brigadier Orchard-Lisle brought significant senior volunteer experience with major educational and other charity fundraising initiatives.

The programme was implemented in October 2020 and is called the New Horizons Campaign. Its strapline sums up why the work of the Trust and need for greater resources is so important: *Building confidence. Strengthening communities. Changing lives.*



A Campaign Council of knowledgeable and influential volunteer leaders has been assembled to advocate support, oversee the strategy and introduce prospective supporters. Chaired by Major General Simon Lalor, its membership and role is detailed at page 14.

The importance of the campaign and what it will enable is readily evident, with over £800,000 already pledged in just three months.

A second objective of the campaign is to encourage all supporters of the Trust to remember its vital work in their wills, with charitable bequests. These legacy gifts will be added to the Trust's endowment in the years to come. The fund will enable continuity, stability and resilience. Its earnings will ensure that the support the Trust extends to cadets and reservists will no longer be reliant on the volatility of annual fundraising.

For more information, including how you can support the New Horizons Campaign, please contact newhorizons@ulyssesrust.co.uk. The young people who rely on The Ulysses Trust need you more than ever.

NEW HORIZONS CAMPAIGN COUNCIL

The Ulysses Trust is honoured and grateful that an outstanding group of volunteers has agreed to serve as the New Horizons Campaign Council. The Council includes Lady Jane Grosvenor, sister of the late 6th Duke of Westminster, who was an enthusiastic and generous supporter of the Trust. She is joined by Julian Radcliffe, founder of the Art Loss Register and former Chairman of The Ulysses Trust and by Henry Colthurst, former Chairman of the City of London Corporation Education Board. The Trustee representatives to the Council are Air Vice-Marshal Nick Kurth and Lieutenant Colonel Phil Neame.

The Council is chaired by Major General Simon Lalor CB TD VR (pictured right). After a full career in the Territorial Army he was promoted to major general in 2007 and was appointed Assistant Chief of the Defence Staff (Reserves & Cadets), succeeding the 6th Duke of Westminster. Simon is also a successful businessman, having founded Britam Defence Ltd and continuing as Director of Britam Arabia.

He is a Vice Chairman of the Council of Reserve Forces and Cadets Association and is also a Trustee of the Honourable Artillery Company. In that latter capacity he has been heavily involved with the Cadet Expansion Programme. In 2012 the Honourable Artillery Company sponsored and helped establish a cadet unit at the City of London Academy Islington and, in 2018, another at Mossbourne Community Academy.

Simon leads the New Horizons Campaign Council all of whom are passionate about the potential this campaign has to change lives and unlock opportunity for young people that the cadets represents, especially for those from disadvantaged backgrounds.



“Through my involvement with the Cadet Expansion Programme I have seen the real impact it is having, with thousands of children experiencing life-enriching cadet activities as part of school life. It has been extremely rewarding to observe the development of individual cadets, who are now at university, and seeing it was their cadet experience that gave them the confidence and ambition to further themselves in society. Head teachers report significant improvement in attendance, behaviour, attainment, self-confidence and ambition of the young people involved, creating positive benefits in all areas of school life. This is in addition to the great work being done by some 3,000 community cadet units throughout the country.

Many of us have had our lives thoroughly enriched by the cadets, and indeed the reserves. We owe it to future generations, especially at this difficult time, to make sure that the same opportunities we have had are readily available to them.”

Major General Simon Lalor CB TD VR



SUPPORTERS AND DONORS

The Ulysses Trust is extremely fortunate to have a number of long-standing benefactors. We do not take their support for granted and we are immensely grateful for their continuing dedication to the Trust.

2020 was a desperate year for expeditions, however our sponsors have stood firm and have enabled the Trust to continue to operate whilst preparing for the anticipated bounce back.

The Nuffield Trust for the Forces of the Crown enabled us to support a handful of reservist and university officer cadet expeditions which took place either shortly before the March 2020 lockdown or are due to deploy in 2021. The RAF Charitable Trust provides funds to support Air Cadet expeditions and in normal years this would account for around a dozen expeditions. Sadly all that were due to deploy in 2020 had to be cancelled. 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; Army Sport Control Board; Clive & Sylvia Richards Charity; Armourers & Brasiers Company; Julian Radcliffe, and the Reserve Forces and Cadet Associations for Greater London and Wessex.

In 2020, our Chairman took a break from his annual 100 mile sponsored bike ride. However his substitute, MARCOMMS Officer Paul Randall, undertook a shorter ride to beat the lockdown blues, raising £420 in the process.

Finally, a name that has appeared in previous dispatches is David Benest. David raised over £10,000 for the Trust by delivering newspapers. Sadly, David passed away in August 2020 and will be much missed by his family, friends and The Ulysses Trust. However, David's fundraising continues via a memorial page set up in his memory at the generous request of his widow, Genevieve, and sister, Jacquetta Clemence. To date it has raised in excess of £5,000.

We are enormously grateful to our supporters and value their commitment to our purpose.



The following is a list of our supporters and donors who made grants and donations in 2020.

A Coy, 4 Para (V)
A & C Young
Air Vice-Marshal Nick Kurth CBE FRGS
Andy Robertson
Army Sport Control Board
Army Training Regiment
Bernard Cazenove
Charles Alexander Wylie
Clive and Sylvia Richards Charity
Colonel Julian G Y Radcliffe OBE QVRM TD
David Blanchard
David Benest
DG When
Leigh Lodge Centenary Fund
Lt Col Sampson
Lt Col Philip Neame MBE
Morgen Thomas Ltd
Nuffield Trust for the Forces of the Crown
Professor Rod Stables
RAF Charitable Trust
RFCA Greater London
RFCA Lowland
RFCA Wessex
Smith Brothers (Leicester) Group Ltd
Sophie Fernandes
The Armourers and Brasiers' Gauntlet Trust
The Lord Faringdon Charitable Trust
The Richard and Bridget Lanyon Charitable Trust
The Sir James Knott Trust
William Henry 2nd Lord Leigh Memorial Fund

In addition we would like to thank all those individuals for the many generous contributions to the David Benest Memorial Fund and the Paul Randall Sponsored Cycle Event. **THANK YOU.**

FINANCIAL REPORT

INCOME & EXPENDITURE 2020

A summary of The Ulysses Trust's financial status at end-2020 (based on unaudited accounts) is summarised in the table at page 17. The dominant factor on our finances for the year has been, unsurprisingly, the pandemic and associated restrictions.

The significant drop in operating income to £147,366 is because a large proportion of donations is directly in support of specific expeditions. As reported elsewhere, very few took place in 2020, whilst 50 applications for grants worth over £130,000 were cancelled. Many were aborted before the grant had been paid, but all monies were recovered from the rest. Where appropriate, these were returned to the relevant funder, with £22,400 being returned to our own reserves. To a lesser degree income was below expectations as a number of other regular donors who might normally have supported us were also obliged to withhold grants in light of the impact of the pandemic on them.

Funds expended on charitable activities of £39,420 was a mere 17% of the previous year, entirely due to the impact of pandemic restrictions on expedition activity. Running Costs of the Trust increased to £128,867 due to the cost of launching the New Horizons fundraising campaign, following a review of the Trust's fundraising strategy at the end of 2019. This is designed to prepare the Trust for a significant increase in grants to cadets anticipated over the next five years, more important than ever as we emerge from pandemic restrictions.

Net operating loss for the year, therefore, was £20,920. Unrealised gains on Investments were £27,427, however, despite the COVID-19 melt-down of markets in the Spring, resulting in positive movement of funds to the balance sheet of £6,507.

Net Assets therefore increased to £630,733. £597,386 of these are fixed assets comprising of investments in two funds for the long-term benefit of Army Cadets (£280,849), and for the long-term development of the Trust (£316,537).



Although cash to hand is £129,639, free reserves, however, are only £33,347, with £69,670 of short-term liabilities comprising prepayments from the Nuffield Trust. These are some three months of present operating costs. This is less than our financial reserves policy, but for pandemic reasons grant applications for the moment are few, and the situation is anyway expected to improve as pledges secured for the New Horizons Campaign convert into receipts. The situation is reviewed monthly.

BUDGET 2021 AND BEYOND

The Trust is determined to provide wholesome support to expeditions to assist the regeneration of units as they emerge from shutdown over the last year. We also recognise that many individuals – Volunteer Reservists and cadet parents – will be facing straitened circumstances. However, until there is more clarity over the course of pandemic restrictions, the £250,000 budgeted on charitable activities in 2021 is inevitably speculative.

For similar reasons, income budgeted of some £450,000 is more a target than a forecast. Much income is linked directly to expeditions taking place, and the prolonged pandemic restrictions mean delay to some plans for the New Horizons Campaign.

We live in uncertain times and so, financially, the Trust positions for the best in 2021, but is prepared for the worst.

ACCOUNT SUMMARY

ULYSSES TRUST - SUMMARY ACCOUNTS 2020 (UNAUDITED)

Operating Income	Restricted	Unrestricted	Total	2019
Voluntary Income / Donations	£86,070	£39,538	£125,608	£246,955
Legacies				
Bank Interest and Dividends	£10,796	£9,663	£20,459	£25,482
Gift aid Tax Recovery		£1,300	£1,300	£2,504
Total Operating Income	£96,866	£50,500	£147,366	£274,941
Operating Expenditure				
VR Grants (incl VR instrs on Cadet expeditions)	£26,430	£0	£26,430	£76,172
University Cadets	£4,290	£0	£4,290	£38,615
Cadets (excluding VR Instructors)	£8,700	£0	£8,700	£119,357
Total Charitable Activities	£39,420	£0	£39,420	£234,144
Cost of Grant Making		£4,345	£4,345	£7,469
Cost of Generating funds		£122,997	£122,997	£91,354
Governance and Administration		£1,524	£1,524	£2,957
Total Running Costs	£0	£128,867	£128,867	£101,780
Total Expenditure	£39,420	£128,867	£168,287	£335,924
Excess of Operating Income over Expenditure	£57,446	-£78,366	-£20,920	-£60,983
Gains/Losses on Investments	£12,894	£14,533	£27,427	£70,004
Net Movement of Funds	£70,340	-£63,833	£6,507	£9,021

BALANCE SHEET - 1 Jan 2021

Fixed Assets

Investments	£280,849	£316,537	£597,386	£569,959
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Current Assets

Cash		£129,639	£129,639	£72,403
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Debtors	£5,344	£2,725	£8,069	£36,940
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Total Current Assets	£5,344	£132,364	£137,708	£109,343
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Liabilities

Creditors: falling due within one year	-£104,340	-£21	-£104,361	-£55,075
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Net Current Assets	-£98,996	£132,343	£33,347	£54,268
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Total Net Assets	£181,853	£448,880	£630,733	£624,227
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Made Up of:

Capital Funds

Army Cadets Fund	£280,849			£267,955
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Future Development Fund (Designated)		£316,537		£302,004
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Total Fixed Assets			£597,386	£569,959
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Operational Reserves

Cadet Reserve	£32,609			£0
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General Reserve		£738		£54,268
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Total reserves			£33,347	£54,268
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Total Trust Funds	£313,458	£317,275	£630,733	£624,227
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CLOSING COMMENTS



“To strive, to seek, to find, and not to yield.”

If ever there was a time that those words of Ulysses - in the closing line of Tennyson’s graphic poem of the great warrior/adventurer after whom the Trust is named - hold poignant meaning, 2020 and the on-going pandemic is surely one. A clarion call.

The ‘warrior’ underpins the ethos of potential beneficiaries we support; the ‘adventurer’, the activity, mind-set and behaviour that we encourage. The values of both seem increasingly important today but particularly in these difficult and unusual times of the pandemic.

The lockdowns drove a bulldozer through the Trust’s aspirations for 2020, but that is nothing compared to the potentially lasting damage it has done to those of its beneficiaries. The prospects of those in education, which includes all 150,400 cadets in the UK, have been severely damaged. Repairing these will not be achieved by cramming the missed learning alone. It will need other imaginative measures.

The cadet and expedition experience - the resilience and other characteristics that accrue from young people of many different backgrounds coming together to overcome hardship and meeting challenges together - is one such measure, one which is increasingly supported by educationalists and academic research.

Finally, many charities have faced existential crises in this year, some not surviving and others depending on emergency funding. We are determined to be prepared for future unexpected events that might threaten our capability to continue serving our cadet and reserve forces communities. We believe that the New Horizons Campaign is in the best interests of our beneficiaries and Services stakeholders. It will also provide re-assurance to our longstanding partners and supporters.

We need to act. Again, to echo Ulysses:

“Come, my friends, ‘tis not too late to seek a newer world.”

WANT TO FIND OUT MORE?

Please direct any enquiries about this Review to:
Philip Neame | Vice Chairman

philip.neame@ulyssesrust.co.uk

“I admire The Ulysses Trust for stepping up at this crucial time, to help re-energise cadet activity through the support it provides. I wish The Ulysses Trust and all the young cadets that benefit from their support the very best for the future.”

Rt Hon David Cameron

WHO'S WHO?

Patron

HRH The Prince of Wales KG KT GCB OM AK QSO
ADC(P)

Vice Patrons

Viscount Chelsea DL *
ACM Sir Simon Bryant KCB CBE MA BA
Lieutenant General Sir Mark Mans KCB CBE
Army Ex-Officio - CFA
MoD Ex-Officio - ACDS (R&C)
RN—Rear Admiral I S Lower MA ACNI
RAF Ex-Officio -AOC No 22 (Trg) Gp
Brigadier Paul Orchard-Lisle CBE TD DL
Colonel JGY Radcliffe OBE QVRM TD *
Clive Richards Esq CBE DL
The Rt Hon James Cleverly TD VR

Trustees

Air Vice-Marshal Nick Kurth CBE FRGS (Chairman) *
Lt Col Philip Neame MBE (Vice Chair) *
Group Captain Matt Stowers OBE RAF
Professor Rod Stables
Sophie Fernandes
Andy Robertson
James Wilson

Campaign Council

Major General Simon Lalor CB TD VR
Lady Jane Grosvenor
Henry Colthurst

Advisory Officers

Colonel Murdo Urquhart OBE - CE ACF & CCF Assoc
Colonel Nigel Thursby
Colonel Bernard Cazenove TD
Colonel Rex Stephenson CBE **
Commander Gary Bushell RN

Ambassadors

Levison Wood
Tania Noakes

Hon Secretary

Lt Col Ian Orr MBE

Hon Treasurer

Major Stephen Wright TD

Legal

Michael Scott, Charles Russell Speechlys LLP

*Also member of the Campaign Council.

** Also Regional Representative.



Fundraising Consultants (Morgen Thomas Ltd)

Robin Thomas
Robert Astick

Grants Applications Committee

Group Captain Matt Stowers OBE RAF (Chairman)
Sqn Ldr Kev O'Brien FRGS RAF (Ops Dir)
Colonel Paul Edwards MBE FRGS
Colonel Chris Young **
Surgeon Commander Steve Mannion RNR
Lt Col Nigel Carr **
Lt Col Cath Davies MBE TD VR SCOTS
Lt Col Philip Neame MBE *
Wg Cdr Roy McCluskey AFC RAF (Ret'd)
Major Tony Simms
Major Dan Tebay BSc (Hons) PGCE MA FHEA **
Sqn Ldr Mike Blakey MBE FRGS CF RAFAC
Sqn Ldr Julian Mosses RAFVR(T) RAFAC
Flight Lieutenant James Dyer RAFAC
Flight Lieutenant Dave Hill RAFAC

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David Preston

Awards Officer

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