

# THE ULYSSES TRUST

## Impact Report

Building Confidence and Resilience through Challenge and Adventure





SINCE 1992 WE HAVE SUPPORTED OVER 42,000 CADETS AND RESERVISTS TO UNDERTAKE EXPEDITIONS AND ADVENTUROUS TRAINING THROUGHOUT THE WORLD.



## 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

Confidence and resilience arise from challenge and adventure. Teamwork and leadership skills develop, along with self-awareness and personal values. Being outdoors in the natural world has proven benefits to our mental health and wellbeing. Expeditions enhance morale and self-esteem, and Adventure Training is a key factor in recruitment and retention.



#### **OUR VISION**

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

## **FOREWORD**



Little did I know when applying to The Ulysses Trust for funding for an Army Reserve adventurous training (AT) expedition I was leading to climb Mts Kenya and Kilimanjaro in 2001 that, some 22 years later, I would have the privilege of being appointed as Chairman of this superb organisation.

I pay tribute to my predecessor, AVM Nick Kurth, for his dedicated and effective leadership through some of the most challenging times this country has seen.

In my experience, rarely do you find an opportunity to combine your passion in life with the continuing development of an already highly successful and impactful organisation to be ready for the future. The Chairman's role achieves both. I have already discovered that the Trustee Board and Grant Application Committee are made up of remarkable people, giving freely of their time and expertise, to ensure that the financial burden on expedition members is kept to a minimum.

We are also blessed with the support and guidance of some hugely generous and influential donors and supporters, whose determination to make the lives of those serving in our Reserve and Cadet Forces as fulfilling and rewarding as possible, is simply fantastic.

In many ways, 2023 was a "year of continuing recovery" striving to get back to the levels of support achieved before the pandemic, reminding us all of the life-changing impact that AT expeditions can have on those who would so often have been unable to fund these experiences on their own.

The impact is so great (and I hope you will see that in the case studies) that we believe it is right to expand the scope of this work with associated organisations, supporting other young people from more challenging backgrounds. Indeed, this is one of our key strategic objectives for 2024; asking ourselves "how can we expand our funding support to maximise the number of people who can benefit from the self-confidence, teamwork, leadership and responsibility that is achieved through challenging and adventurous activities?"

It could be argued that the cost of living crisis and uncertainty of employment, amidst fears of recession, render AT expeditions a "nice to have". In fact, these are precisely the reasons why we need to do more. The opportunities we encourage motivate and support people to become more resilient, and to develop coping strategies for the increased mental and emotional challenges they will face.

Across the MOD, difficult decisions are being made around the funding of AT, particularly for reservists. We are re-emphasising the Trust's readiness to provide grants to groups or individuals, to help maintain this element of the "offer" to reserves and cadets – so vital also to their recruitment and retention.

The Cadet Forces appear to be recovering well post-pandemic, and so we aim also to provide more support for Adult Volunteers (CFAVs) to gain the necessary qualifications that enable them to plan and lead AT expeditions at all levels.

Clearly, there is much to do, and I was therefore delighted with the appointment of our first-ever CEO, Polly Marsh, in the summer of 2023. Previously a Trustee on our Board, Polly brings that experience, her background as an Army Officer, and a passion for the Cadets to the role. I look forward to capitalising on her early successes, growing networks, and building relationships across the sector.

Brigadier Tim Seal TD DL VR Chair of The Ulysses Trust

## WHAT WE DO



"I feel a lot more independent and now know that I need to stop doubting myself as much. This experience has taught me so much not only about the sailing but about myself and I can't thank you enough for making it possible."

Cadet Kyle | Hebburn Sea Cadets

#### **CHANGING LIVES**

We change lives through enabling outdoor challenge, exploration and adventure; supporting activities that deliver confidence, resilience, self-awareness and values; opening eyes to a world of unseen opportunity, and achievement beyond expectation.

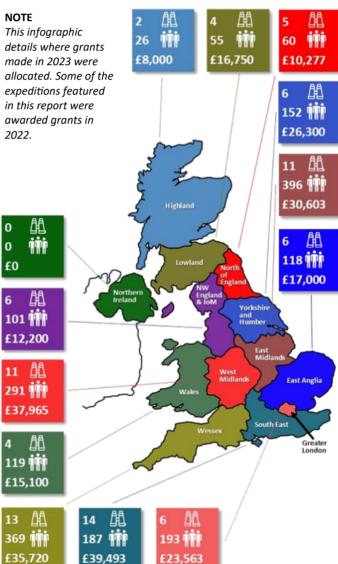
"The trip pushed me both mentally and physically from day one and has allowed for the development of the whole team both individually and as a group."

Sgt Noah Barker | Ex: Mountain Storm 2023

#### **BENEFITTING ALL PARTS OF THE UK**

Grants reached units in all parts of the UK, as shown on the map below, displaying expeditions supported (41), participant numbers (111) and grants made, based on Reserve Forces' and Cadets' Association Regions.

88 grants totaling £272,971 were made by The Ulysses Trust in 2023 to support 2,067 cadets and reservists to take part in adventurous activities in 2023 & 2024.



Many thanks to all our supporters who enable us to support life-changing impact on the lives of our cadets and reservists. Without you our mission would not be possible. Thanks also to all the individuals and units who provided photographs, quotes, reports and data in 2023. **Thank you.** 

## CASE FOR SUPPORT



EX: The CVQO Westminster Award Cornwall Expedition 2023 Location: Cornwall | Unit: CVQO

Despite challenging adventurous activities having proven positive impact on individual development, unit morale, and social mobility - they are **not funded by the public purse**.

Since our founding we have extended grants totaling nearly £3.8 million to support over 42,000 young people participating in over 3,000 expeditions. Challenging outdoor adventurous activities offer new experiences that develop selfawareness and personal values – such as courage, respect, integrity, loyalty and selflessness, as well as vital life skills - such as initiative, resourcefulness, managing risk and judgement. They are also proven to be effective therapy for both physical and mental well-being, so critical for today's youth in a post-COVID-19, internet-focused world. We focus strongly on disadvantaged young people and areas of deprivation, enabling reserves and cadets access to life-changing opportunities that might otherwise be out of reach.

"Having a cadet contingent at our academy has changed lives. We've taken students to different countries who have never left London... we've developed and added to the learning of students in the Academy and given them new and exciting opportunities, building resilience, encouraging ambition and developing skills for everyone who takes part."

Lt A Hesketh | Contingent Commander City Of London Academy Islington CCF Pivotal research into the Impact of Cadet Forces, undertaken by Professor Simon Denny at the University of Northampton found that:

"By engaging young people in activities that boost their confidence, their motivation and their desire to achieve, the cadet forces are helping young people to move out of poverty."

In recent years there has been growing demand for the support the Trust provides. The success of the Government's Cadet Expansion Programme, all based in state schools, has reached its target of 500 CCFs—a high proportion in areas defined as of high or very high areas of deprivation.

Headteachers report significant improvement in attendance and behaviour, with higher academic attainment, self-confidence and ambition of the young people involved, creating positive benefits in all areas of school life.

"I grew up in Islington, the youngest of four children raised in a Nigerian household. In my teens, I was shy and reserved. I didn't really enjoy engaging with my peers. I joined the CCF not really knowing what I had signed up to. I didn't realise it then, but it was a life-changing decision."

Cadet Instructor and nursing student Sarah A.



## CEO'S REPORT AND OVERVIEW

Since I came on board as the charity's first CEO, a review and update of the business plan for the future has taken place — with ambitions to extend our reach by working more closely with associated organisations and increase our impact where there is most need. I believe building relationships is key to enable all of us to support more cadets and reserves — ensuring that we all work together - to collaborate but not duplicate our efforts. To underpin this, new outcome measures have been researched, and are included in this annual Impact Report (see page 15). These consider the 5 themes that form the **Government's Social Value Model**.

A team review has also taken place. I am delighted to welcome new Vice Patrons who will help drive the growth and impact of the Trust, new Ambassadors who are all inspirational role models, and new professional advisors - all expert academics in their fields of social impact, the benefits of outdoor challenge and adventure on mental health, and sustainable travel.

Additionally, Sqn Ldr Mike Blakey has recently volunteered as manager of our excellent Grants Applications Committee. He takes on responsibility for ensuring that it continues to comprise a diverse group of volunteers from all services and backgrounds with the experience and expertise to align our grant awards with optimising impact and delivering social value.

These changes are important. It is becoming increasingly clear that the pandemic triggered a number of long-term social, mental health and well-being challenges, compounded by social media issues and the cost of living crisis. The number of applications from cadet units has increased by more than 50% in a year. Across Cadet Forces, University Officer Cadets and the Volunteer Reserve (VR), there is a greater need for our support than ever but, to secure the increasing resources necessary, the Trust must ensure funds are well-directed and have maximum impact.

As the table below shows, grants awarded in 2023 increased by nearly 20% to just under £273,000 in 2023 - a record, as activity recovers to prepandemic levels, and reflecting increasing levels of financial support from The Trust, particularly to cadets from disadvantaged backgrounds. One measure of disadvantage that we use is the numbers on Free School Meals (FSMs): 334 cadets, or 35%, were confirmed as in receipt of FSMs on expeditions we supported in 2023. This is sadly another record reflecting the fact that since 2019, the proportion of secondary school students on FSMs has nearly doubled from 12.4% to 24.1% in 2023. It is worth noting that the proportion we helped significantly exceeded that benchmark, confirming our plans to increase levels of support for cadets are appropriate, well-targeted and are delivering.

Unit type	Exped.	Adults	Cadets	<b>Total Nos</b>	Grants	Per person	Per Exped
ACF	12	117	340	457	£76,147	£167	£6,346
Sea	8	31	110	141	£10,120	£72	£1,265
ATC	10	72	288	360	£35,688	£99	£3,569
CCF	12	49	258	307	£46,190	£150	£3,849
All Cadets	42	269	996	1,265	£168,145	£133	£4,003
University OCdts	24	489	0	489	£62,537	£128	£2,606
Army	21	241	0	241	£41,289	£171	£1,966
RNR/RMR	1	72	0	72	£1,000	£14	£1,000
RAuxAF	0	0	0	0	£0	£0	£0
All Reservists	22	313	0	313	£42,289	£135	£1,922
Totals	88	1,071	996	2,067	£272,971	£132	£3,102

Despite expectations, however, the levels of activity, reflected by the expeditions supported and the total number of participants, did not quite recover to pre-pandemic levels as the number of applications received in the last quarter of 2023 collapsed. We ascribe this to policies emerging from the MOD to try and meet budget cuts which variously restrained VR training, overseas travel and expeditions. Many VR, University Cadet and Cadet Forces plans were pulled or postponed, though Cadet Forces with distinct funds were less impacted. The Trust has long argued that the activities it supports are important factors in unit recruitment, retention and morale, and so assiduously promoted its readiness to support a greater range of activity during this hiatus. Fortunately, these restraints have now been largely rescinded as they were seen to be having a deleterious impact on armed services recruitment. With the cork now removed, there has been a resurgence in applications this year.

The Ulysses Trust therefore expects to see a further strong increase in demand from all areas in 2024. We are working closely with all three reserve and cadet forces to ensure that they know we are here to help them meet the challenges that they and their people face and to benefit from everything adventure and challenge offers.

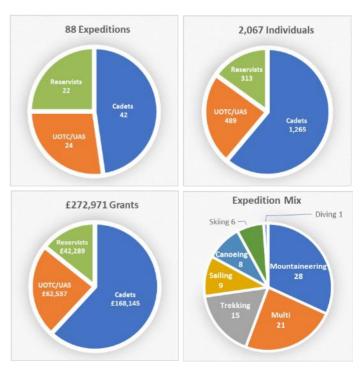
We are, I believe, well prepared for this. Our New Horizons fundraising campaign was brought to a close in 2023, having raised over £2m and dramatically expanded both the breadth and depth of our supporter base. The resources required for the campaign were reduced and refocussed on donor management, optimising that expanded base. As a result, the return on fundraising costs more than doubled over 2023, with a record of nearly £450,000 being donated (more detail at pages 18-20).

In his Foreword, our Chair emphasises that there is much else still to do. The great news is that what we do is proven to work! I want to thank the whole team, all members of The Odyssey Circle and other donors alike – as well as business and charity partners who are collaborating with us to support cadets, reserves, CFAVs and veterans, who really need us more than ever. **Polly Marsh | CEO** 



#### **OUTPUT 2023**

The table opposite gives a breakdown of the £272,971 of grants awarded in 2023. The table above details our Key Performance Indicators and the charts below clearly show that young cadets are now are our main focus.



## **GRANTS MADE TO CADETS 2023**



EX: Pedal Overlord 2023 | Location: France Unit: 129 Squadron Air Cadets Tunbridge Wells (Kent Wing)

Although cadet numbers have recovered well from the near 15% drop in numbers that resulted from their inability to meet, train and recruit during the pandemic lockdowns, it is taking longer to restore the skills base of the Cadet Force Adult Volunteer (CFAV) instructors. That, meanwhile, limits their ability to plan expeditions and supervise adventurous training - at least without recourse to external providers, which of course adds to the costs. This, just as cadets need such adventurous opportunities to help recover from the deleterious impact of lockdowns on their social development; while the cost of living crisis severely limits their (or their parents') ability to contribute to costs of them – as evidenced by the FSM stats highlighted by our CEO above. The actual number of disadvantaged cadets supported is likely to be much higher, and includes other Pupil Premium criteria such as young carers, children living in social care, and those living in other challenging circumstances. There will always be sensitivities and difficulties faced by units identifying all socioeconomic criteria.

We continue to target money where there is most need - and the biggest impact. A record near 60% of CCF expeditions were from state-funded schools as the Cadet Expansion Programme bore fruit. This year over half the cadet expeditions supported by the Trust took place overseas, with many young people going abroad for the first time in their lives.

## **KEY STATS**



42 expeditions supported



1,265 participants



£168,145 grants



**£133** average grant per cadet



35% cadets on FSMs



48% av. personal contribution

We are also particularly keen to support Cadet Force Adult Volunteers and Veterans – the critical foundation to all cadet force activity - to enable them to gain qualifications that support cadet AT and expeditions.

> "Thank you so much for giving us this opportunity to go on such an amazing boat. We've all had an awesome time and have learnt so much. I feel some of us have come back a bit more mature."

Cadet Ellie | Wells-next-the-Sea Sea Cadets Unit



## **CADET CASE STUDY**



#### SHIZA'S STORY

The Ulysses Trust has supported young people from Birmingham's Tile Cross Academy's Combined Cadet Force unit to take part in a total of 11 expeditions since 2016. This has enabled 142 young people, most facing significant disadvantage and poverty, to benefit from extraordinary outdoor activities in the UK, USA and Italy. The school is in the top 3% for deprivation according to the 2019 Index of Multiple Deprivation for England. 75% of pupils are entitled to Free School Meals and the Pupil Premium. One of the cadets who has benefitted from our support is Shiza.

"Life isn't always straightforward – and there will be challenges – but, how you deal with those will be what ultimately shapes you as a person, and that's your choice to make."

Originally from Pakistan, Shiza's family moved to the UK when she was 11 years old. Shiza's world was turned upside down shortly after joining secondary school when she and her brothers were split up and taken into care which had a devasting impact on the children. Desperate to spend more time with her siblings Shiza joined her brothers at the school's Sea Cadet Unit (set up in 2010 as part of the Cadet Expansion Programme). This was a turning point in her life.

#### **NEW-FOUND CONFIDENCE**

With financial support from The Ulysses Trust, Shiza took part in 'First Tracks' at Tamworth SnowDome— a programme designed to teach young people to ski. After much success with First Tracks, and a new-found liking for snow sports, Shiza took part in Ex: Snow Camp Excel in Andorra in early 2023 (also supported by the Trust) putting her skills to the test on the real slopes and receiving a certificate for being the most improved skier (see below).

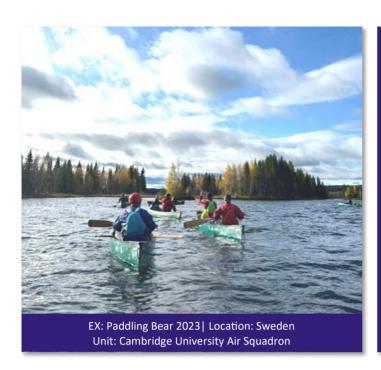
Upon returning home, with new-found confidence Shiza started to see that there was more out there for her. With support from her school, she went on to apply for a fully-funded bursary at the prestigious Wellington College, where she is now studying for her A-Levels. Keen to encourage and support more young people she has also become an ambassador, speaking at school assemblies and appearing on the BBC's Ski Sunday programme – inspiring and encouraging others to follow in her footsteps (or her ski tracks!). This inspirational story has been developed into a short film by Ulysses Trust supporter BAE Systems to share Shiza's journey. Scan the QR code below to watch the video.

"I always thought that skiing was a sport for rich people, I never thought I would get the chance to do it, especially given where I grew up. As a Muslim female from Pakistan, snow sports isn't something we traditionally would get access to, or even consider."

Cadet Shiza | Tile Cross Academy CCF



## **GRANTS MADE TO UNIVERSITY CADETS 2023**



University Officer Cadets (OCdts) also applied in record numbers – at least until the last financial quarter - when MOD directives led to many plans being put on hold. In 2023 we awarded 24 grants totalling £62,537 to university OCdt units. These grants supported 400 OCdts and 89 reserves, totalling 489 participants. The average grant per cadet was £128. Our grants helped reduced the average personal contribution to 23% expedition costs.

University Officer Training Corps (UOTC), University Air Squadrons (UAS), and University Royal Naval units (URNU) exist to give students a broader understanding of the armed forces, to develop life skills including teamwork and leadership, through life-changing experiences such as adventurous training and expeditions.

Most students do not have much money, surviving on loans and leaving college with huge debts – so despite being part of the Reserve Forces, the cost of such expeditions is beyond the reach of many.

Additionally, a great deal of MOD resources are presently taken up with training Ukrainian armed forces, which reduces normal training opportunities such as flying training for UAS cadets. As a result AT and expeditions substitute and persuade university OCdts to stay.

## **KEY STATS**



24 expeditions supported



489 participants



£62,537 grants



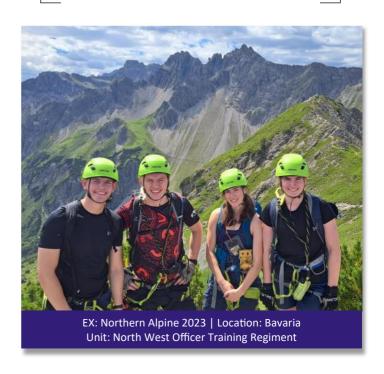
**£128** average grant per OCdt



23% av. personal contribution per OCdt

The Ulysses Trust believes it is in all our best interests to engage and attract bright young people into our university cadet forces and support the recruitment and development of our future military leaders. Adventure Training is the key to both.

> "We joined to fly, but we stay for the Adventure Training" Anon OCdt | East Midlands UAS



## UNIVERSITY CADET CASE STUDY



EX: Dragon Highland EMU 23 | Location: Scotland Units: East Midlands UOTC and Birmingham UOTC

#### **EX: DRAGON HIGHLAND EMU 23**

On 5th January 2023, East Midlands UOTC (EMUOTC), along with colleagues from Birmingham OTC, regular and reserve soldiers set out to the Scottish Highlands to complete their Winter Mountaineering Foundation Course.

For many, this was the first time in the Scottish mountains, especially in winter, and the week started with learning new skills - how to use the safety equipment such as crampons and ice axes, as well as learning about each other as a team. They also learnt about ice axe arrests, built snow holes, and practised avalanche rescues. They completed an overnight hiking expedition, staying the night in a bothy (a mountain refuge hut), using their new night-navigation skills.

#### **LEARNING LIFE SKILLS**

Expedition planning experience provided more lessons learnt - two groups planned to summit the highest peak in the UK, Ben Nevis (1,345m) from different directions, in full winter conditions.

One route succeeded where the other was found to be too dangerous due to the avalanche risk. Learning life skills such as risk assessment, judgement and resourcefulness is something borne out of such experience. Another group walked up a' Bhlair peak, in whiteout conditions!

#### PERSONAL DEVELOPMENT

All participants grew in confidence and resilience, learning new skills and putting them all into practice in a real environment. While some of the days were arduous and long, the experience was extremely rewarding, conquering some tough routes and conditions. The sense of achievement was huge.

One of the four groups managed to get one final peak, Beinn a' Chaorainn (1,083m), which involved climbing a ridge, using ice axes and crampons. "On either side of the ridge was a steep rocky drop. On day 1 of the course this would have freaked us all out but by day 5 we had the skills, knowledge and confidence to tackle the ridge!"

Weather and avalanche reports were a key part of the training as they enabled us to plan ahead, pack the correct kit and select the safest routes. Towards the end of the week, many students had a go at presenting the weather brief for the whole group, which showed how much the students had learnt from the knowledgeable instructors.

#### **BUILDING CONFIDENCE AND RESILIENCE**

The winter mountaineering foundation course has given us a fantastic introduction to the winter environment, conditions and skills required. We may not have had great views, but the resilience and determination we developed in these conditions are qualities we will carry for life. Many are us are now looking to gain Quality Mountain Days to start the journey on the Mountain Leader training pathway.

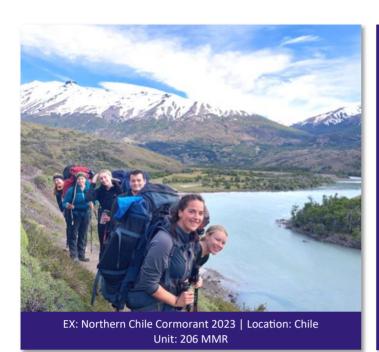
The above is an edited version of the report written by OCdts Rickard and Russell from EMUOTC.

Further details about the impact of expeditions on individuals and units + social impact data (Social Value) are summarised on pages 14-15.

"I feel so much more confident [doing] winter mountaineering, and it has inspired me to get more Quality Mountain Days to get on the next course!"

Anon OCdt | EMUOTC

## **GRANTS MADE TO RESERVISTS 2023**



## **KEY STATS**



22 expeditions supported



313 reservists



£42,289 grants



£135 av. grant per reservist



7% av. personal contribution per reservist

Reserve Forces applications for grants took a serious decline following the late-23 directives on Adventurous Training (AT) from the Ministry of Defence (MOD). These opportunities are a known attraction for people joining and staying in the Reserves, and these MOD restraints compounded a pre-existing and more fundamental problem. For a number of reasons, including the cost of living crisis, Reserve Forces recruitment is failing to meet targets, meaning many units are under strength. Some are struggling to meet core commitments, let alone undertake attractive but non-core activity.

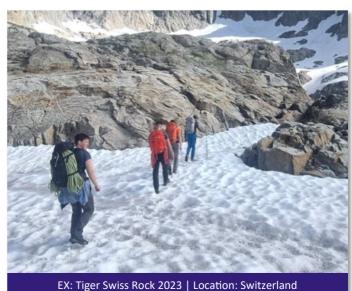
Although these restrictions are now largely rescinded, this has created a vicious circle which partly explains the slow recovery in Volunteer Reserve applications that the Trust has witnessed following the pandemic.

Knowing the difference that Trust support can make to Reserve Forces AT plans, and implicitly their recruitment and retention, we have been promoting our services through our networks and stand ready to help everyone to take part in AT and expeditions.

We are optimistic that we can help reverse this trend and that Reserve Forces activity will be on the rise again in 2024.

"The exercise facilitated an improvement of mental resilience, climbing skills, general fitness and also unit cohesion, while simultaneously working as a retention tool due to the enjoyable nature."

> **CPL Amy Stallard** 212 (Yorkshire) Field Hospital



Unit: Army Mountaineering Association

## **RESERVIST CASE STUDY: 3RWELSH**



EX: Dragon Squall | Location: Aonach Mor, Lochaber, Scotland Unit: 3RWelsh

3RWelsh is the sole reserve infantry unit in Wales, distinguishing itself from other reserve units that focus on medical, signalling, logistics, or armoured operations. Adventure Training (AT) plays a pivotal role within the battalion, offering exceptional opportunities for leadership development, team building, and personal growth. This report delves into the profound impact of AT on both reservists and regular staff within the unit.

#### **ADVENTURE TRAINING ENHANCES SKILLS**

AT provides a platform for enhancing core infantry skills such as personal fitness, navigation, and teamwork. It encompasses activities like mountaineering, trekking, kayaking, and canoeing, fostering physical fitness, map reading, and adherence to orders. Such training not only prepares soldiers for operational readiness but also cultivates leadership, confidence, and camaraderie.

#### **EXPEDITIONS AND TRAINING PROGRAMMES**

The battalion's AT programme extends beyond routine drills, with expeditions planned well into the future. These include ventures to Norway, Nepal, and domestic locations like North Wales. The appeal of such expeditions has garnered significant interest among both reservists and regular staff, fostering collaboration and mutual understanding in a non-pressurised environment.

#### INDIVIDUAL DEVELOPMENT

Numerous success stories underscore the transformative impact of AT on individuals within the unit. Individual soldiers have flourished, leveraging AT experiences to enhance their skills and pursue leadership roles within and beyond the military. Such personal growth not only benefits the individual but also enriches the overall capability and cohesion of the unit.

#### **RECRUITMENT TOOL**

While AT presents myriad benefits, financial constraints and logistical challenges persist. Leveraging non-public funds from organisations like The Ulysses Trust enables flexibility in planning and resource allocation. Moreover, AT serves as a recruitment tool, attracting individuals seeking unique experiences and professional development opportunities.

#### **IMPROVING RESILIENCE**

In conclusion, AT stands as a cornerstone of 3RWelsh's ethos, offering invaluable experiences that transcend traditional military training. By developing essential skills, fostering teamwork, and promoting personal growth, AT plays a vital role in enhancing operational readiness and bolstering the resilience of both reservists and regular staff. As the unit continues to prioritise AT initiatives, it remains poised to navigate evolving challenges and capitalise on opportunities for growth and excellence.

#### **KEY POINTS**

- ✓ The Trust has supported 6 expeditions by 3RWelsh since 2016 with grants totalling £6,120.
- Our continued support is helping this unit to grow stronger.
- ✓ 3RWelsh won our best reservist expedition award in 2016 for Ex: Dragon Sisimiut. 14 reservists undertook a 9-day, 165km unsupported trek along the Arctic Circle Trail on the west coast of Greenland.

## **IMPACT MEASUREMENT**

This is a summary of the 86 survey responses we received from the expedition leaders and Commanding Officers of units that took part in 88 expeditions supported by The Ulysses Trust from 1 Jan to 31 Dec 2023. It includes a sample of the 255 comments received reflecting the overall survey results (response rate: 98%).

#### PERSONAL DEVELOPMENT AND LIFE SKILLS

100% Positive impact on individuals. Measuring the impact on the quoted characteristics of leadership, teamwork, confidence, initiative, self-discipline and judgement—our survey said: 77% major positive impact on most of the quoted characteristics and 23% positive impact on the majority of the quoted characteristics.

"The expedition had a tremendous impact on several individuals. Cadets who had hardly spoken...were taking charge and organising meals, cleaning and sail hoisting. The sailing environment provided a challenging and safe place for individuals to thrive and flourish."

1163 (Colne Valley) Sqn | Ex: Achieve Together 2023

#### REFLECTION AND LEARNING

The Trust continues to review its activities and looks for ways to improve on an ongoing basis.

Reflecting on the data we have received, the Trust has learnt that:

- Expeditions supported by the Trust have a significant impact on mental health and wellbeing and enable those who are financially disadvantaged to benefit from these experiences.
- Expeditions continue to play an important role in COVID-19 recovery for individuals and units.
- Survey respondents reported that 96% were strongly satisfied with our service.

"Trust members were very helpful,
efficient in dealing with any questions and
were hugely encouraging in any
conversations we had during the
application process and when informing
us of the grant. It was greatly
appreciated."

Northern Ireland UAS | Ex: Arctic Edge 2023

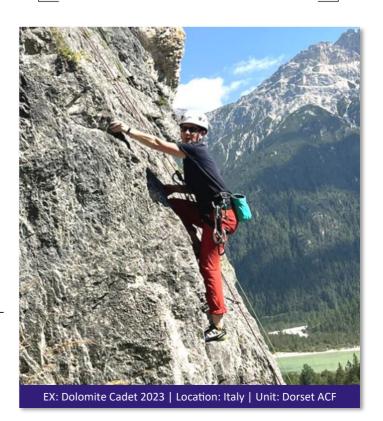
#### RECRUITMENT, RETENTION AND MORALE

#### 100% Positive Impact on Units

Measuring the impact on the quoted areas of recruitment, retention and morale—our survey said: **61% major** positive impact on all 3 of the quoted areas, **31% positive** impact on all 3 of the quoted areas and **8% modest** positive impact on 1 or more of the quoted areas.

"After a challenging time for NHS staff and the merging of the unit this expedition was essential for unit morale and retention demonstrating to those who participated and others the kind of opportunities that can be offered by the Army."

206 MMR | Ex: Northern Chile Cormorant 2023



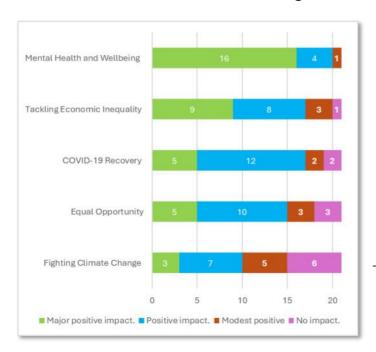
## **SOCIAL VALUE**

As well as developing personal values and life skills, and having enormous benefits to recruitment and retention in our Reserve and Cadet Forces – we want to measure the social impact we have and the role we play in levelling up in society. It is a huge driver behind our purpose, and this report enables us to show the incredible impact we are able to deliver through the support of our donors.

We are delighted to present The Ulysses Trust's first Social Value data, measuring the effect of challenge and adventure across five areas, focussed on how outcomes tackle economic inequality, climate change, COVID-19 recovery, equal opportunity, mental health and wellbeing of participants. These five new themes align with the UK Government's Social Value Model.

#### **SURVEY RESULTS**

This first survey targeted cadet units supported by the Trust in 2023. We received 21 responses and 83 comments from the 34 units we supported (response rate of 62% will grow to reach 100% in 2024). The results are shown in the table below. The biggest impact on the participants was on their mental health and wellbeing - with 100% positive impact. This is closely followed by tackling economic inequality impact (95% positive), COVID -19 recovery (90%), equal opportunity (86%) and 71% for activities that tackle climate change.



## **KEY RESULTS**



100% positive impact on MENTAL HEALTH & WELLBEING



**95%** positive impact on tackling **ECONOMIC INEQUALITY** 



90% positive impact on COVID-19 RECOVERY



**86%** positive impact on **EQUAL OPPORTUNITY** 



**71%** positive impact on fighting **CLIMATE CHANGE** 

The ongoing cost of living crisis has resulted in our support being even more important than prepandemic levels, and our impact more keenly felt by those who need it most. As a result, The Ulysses Trust has widened its reach to ensure we capture more people who need our support, while at the same time focussing our efforts in a pro-active way on where there is most impact. This has seen the inclusion of the most underprivileged (measured using Pupil Premium factors in state schools) rise from 25% in 2022, to 35% in 2023. The outcome measurements of all five social value themes will continue to expand, and The Ulysses Trust will be able to capture 100% of this crucial data in future years.

This first Social Value report illustrates why what we do is so important. Challenge and adventure is hugely impactful across all five themes – especially mental health and wellbeing, which is in a crisis state for today's youth and veterans in particular. We are committed to improving Social Value to our Reserve and Cadet Forces.

"The expedition gave the young people a revived sense of purpose not only in their own personal lives but [how] their behaviour can affect the wider community. The youngsters felt free and had space to think about their futures."

Lt Colonel Konstantinious | GLSEACF

## MESSAGES FROM OUR AMBASSADORS

The Ulysses Trust is fortunate to have fantastic support from a range of supporters, stakeholders and volunteers. Part of our excellent volunteer team are our Ambassadors. They represent the Trust at events and help us raise awareness about the work we undertake, among stakeholders, potential donors, and society at large.

We've been lucky to have explorer Levison Wood and Mountain Guide Tania Noakes as our two Ambassadors for several years now. Lev and Tania have been brilliant supporters of the Trust and have helped raise our profile at events and through their networks.

Due to this success, we've decided to expand our Ambassador team to reach new audiences and help get our message out further and wider. Here are their messages.



**LEVISON WOOD** Explorer, writer, photographer and Army reservist.

"I'm proud to support the amazing work that The Ulysses Trust has done this year to change the lives of so many people. The expeditions they facilitate help OCdts and reservists develop morale, resilience and confidence, giving them the skills they need to achieve their goals. I've always believed in the power of the great outdoors to inspire camaraderie and instil courage. My early experiences of adventure in the UK and beyond are what led me to a career in the army and as an explorer. Thanks to the Trust, so many young people have been given the opportunity to reach their potential."



**TANIA NOAKES** IFMGA Mountain Guide and first British woman to complete the Norwegian 'Norge Pa Langs' 82 day solo ski journey.

"The work that The Ulysses Trust does to create opportunities for so many people from diverse backgrounds to participate in adventurous activities is something that I wholeheartedly support. Many will never have experienced challenging outdoor activities before and would not be able to do so without the financial support of the Trust. It is with great pleasure that I see so many new Ambassadors join the Trust this year and I look forward to them supporting and carrying this same ethos forward into the future."



**LOUIS RUDD MBE** Record-breaking polar adventurer and expedition leader.

"It is an absolute privilege to be asked to be an Ambassador for the wonderful Ulysses Trust. In 2015, they supported an expedition I led with Reserve Forces soldiers to ski 1,100 miles across Antarctica. I've seen first-hand how much of an impact that had on those young men; without The Ulysses Trust, that expedition would not have happened. The benefits of adventurous training cannot be underestimated - so it's my privilege now to be able to repay that support, and help more cadets and reservists to launch their own expeditions."



**JORDAN WYLIE** Award-winning adventurer, international bestselling author and one of the stars of Channel 4's BAFTA nominated shows Hunted and Celebrity Hunted.

"I am very proud to have been invited to be an ambassador for The Ulysses Trust. We share the same values and passion with our common goal of providing opportunities and inspiration to young people through adventure and the great outdoors. Not only do these challenges develop teamwork and leadership skills, they are vital in supporting mental health, boosting confidence and resilience, and provide a huge sense of achievement to those who need it most."



**SALLY ORANGE MBE** Multi-record-breaking adventure athlete and mental health campaigner.

"It's a real honour and privilege to have been asked to champion The Ulysses Trust, an organisation I truly believe in. As a former beneficiary allowing me to climb Island Peak in Nepal when I was a serving reservist, I know first-hand that the adventurous challenges they support not only build confidence and resilience but also support an individual's mental health, often at a time when they need it most. I can't wait to get stuck in and see what challenges are taken on."



**RAY MEARS** Bushcraft and survival expert.

"I'm delighted to join The Ulysses Trust as an ambassador as we both share a passion for adventurous training and the huge benefits it provides young people. It gives them a chance to find themselves, to do something different, to discover courage, the importance of being a good follower in a team, the importance of being a good leader in a team. And the more adventurous it is, the better it gets. It powers them through life. If ever there was a great investment in society, it's in adventurous training. Developing the minds, the heart, and the spirit of future generations."



**DR WENDY SEARLE** Polar expedition leader, inspirational speaker on adventure & mental resilience and mother of four.

"I'm so excited to be working with The Ulysses Trust and more especially in the role of ambassador for diversity and inclusion. There is room for everyone in the adventure world, and it needs to be more representative. I didn't know when I went on a 1,000km solo journey to the South Pole, that expeditions could be so empowering, or so life-changing. I am looking forward to encouraging many more people to discover the benefits of adventure through The Ulysses Trust."

## FINANCIAL REPORT



In 2023 we witnessed a strong recovery from the pandemic's impact on activity until the final quarter, when applications from Volunteer Reserve and university units nearly ceased, alongside a slight slowdown from cadet units. Expectations of a full recovery to pre-pandemic activity failed to materialise, most likely due to uncertainty over MOD approvals for Adventurous Training (AT) expeditions in 2024.

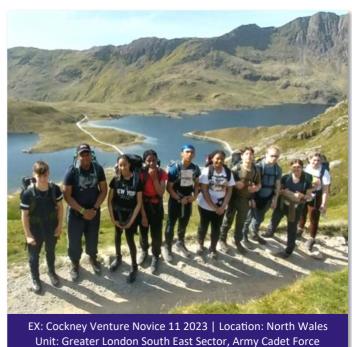
Nevertheless, financially, grant expenditure surpassed pre-pandemic levels, primarily due to increased levels of support for cadet expeditions, aiming to alleviate costs for cadet participants. This continues to be urgent not only to support pandemic recovery but also due to the escalating cost of living crisis. Alarmingly, the proportion of secondary school students on Free School Meals (FSMs) rose from 12.4% in 2019 to 24.1% by 2023, with at least 35% of cadets on FSMs participating in supported expeditions.

Our financial status, summarised in preliminary unaudited accounts, showed encouraging progress in 2023. The New Horizons campaign concluded in Q2, delivering over £2m in pledges, and our focus shifted to donor management, to optimise our expanded donor base. Donations received increased by 18% to £445,047, resulting in a record total annual operating income of £482,078, and with over £420,000 assured for 2024. This was despite a 25% reduction in fundraising costs,

validating the up-front investment in the New Horizon campaign. Grants totalled £268,296, up 19% from 2022, with over 60% allocated to cadets, reducing their expedition costs by 6%. Despite the appointment of a CEO, running costs increased by only 1%, counter-balanced by the reduction in fundraising costs. Here, the return on investment has improved by over 50%. This yielded an operating surplus of £84,119, increasing operating reserves to over £170,000, nearing our policy of 6 months of expenditure. Our capital funds stabilised in 2023 with a modest gain, and income they generated increased by 11.6%, leading to a 13% increase in total net assets to £738,735.

#### **LOOKING TO 2024**

Looking ahead to 2024, budgeting has been challenging due to uncertainty over the impact of recent MOD AT policy on grant applications. Based on Nuffield Trust pledges (including prior year underspend) £156,000 is budgeted for Volunteer Reserve and university cadet expeditions. Despite cadets being less impacted by recent MOD policy, we are yet to reduce their contributions to under 33% of expedition costs. Therefore, we have budgeted £250,000 for cadet grants, a 50% increase over 2023. This will require approximately £140,000 of new income in addition to the £420,000 assured at the start of 2024.



## **ACCOUNT SUMMARY**

### **ULYSSES TRUST - SUMMARY ACCOUNTS 2023 (UNAUDITED)**

Operating Income	Restricted	Unrestricted	Total	2022
Voluntary Income / Donations (incl Gift Aid)	£295,000	£158,615	£453,615	£387,135
Bank Interest and Dividends	£10,500	£13,814	£24,313	£21,788
Other Income			£0	
Total Operating Income	£305,500	£172,428	£477,928	£408,922
Operating Expenditure (net of prior year funds returned from	cancellations)			
VR Grants (inc. VR instrs on cadet expeditions)	£46,405	£0	£46,405	£60,175
University Cadets	£55,453	£0	£55,453	£61,166
Cadets (excluding VR Instructors)	£166,438	£0	£166,438	£105,865
Total Charitable Activities	£268,296	£0	£268,296	£227,206
Cost of Grant-making		£31,526	£31,526	£3,197
Cost of Generating funds		£92,623	£92,623	£120,951
Governance and Administration		£5,514	£5,514	£4,647
Total Running Costs	£0	£129,663	£129,663	£128,796
Total Expenditure	£268,296	£129,663	£397,959	£356,002
Excess of Operating Income over Expenditure	£37,204	£42,765	£79,969	£52,921
Gains/Losses on Investments	£778	£877	£1,655	-£91,336
Net Movement of Funds	£37,981	£43,642	£81,623	-£38,415
BALANCE SHEET - 1 Jan 2024				
Fixed Assets				
Investments	£265,704	£299,467	£565,171	£563,516
Current Assets				
Cash	£186,574	£39,894	£226,469	£126,285
Debtors	£2,640	£2,976	£5,616	£10,840
Total Current Assets	£189,214	£42,870	£232,085	£137,126
Liabilities				
Accruals & Creditors: falling due within one year	-£55,760	-£2,760	-£58,520	-£47,680
Net Current Assets	£133,454	£40,110	£173,565	£89,446
Total Net Assets	£399,158	£339,577	£738,735	£652,962
Iotal Net Assets	1333,138	1333,377	1738,733	1032,302
Made Up of:				
Capital Funds				
Army Cadets Fund	£265,704			£264,926
Future Development Fund (Designated)		£299,467		£298,590
Total Fixed Assets			£565,171	£563,516
Operational Reserves				
Restricted Reserves	£133,454			£92,101
General Reserve		£40,110		-£2,655
Total Reserves			£173,565	£89,446
Total Trust Funds	£399,158	£339,577	£738,735	£652,962

## **ODYSSEY CIRCLE AND DONOR BENEFITS**



In 2023 the New Horizons Fundraising Campaign concluded on a high note, amassing £2,000,000 in pledges and donations. Additionally, collaboration with the veteran community bolstered the Cadet Force Adult Volunteer base, garnering further backing from the Veterans' Foundation.

The Fundraising Council played a pivotal role in the campaign's success. Its members' guidance was instrumental in achieving the fundraising target.

A significant milestone was the launch of the Odyssey Circle in October, aimed at acknowledging and rewarding our supporters. The inaugural event, hosted by the Worshipful Company of Fishmongers, drew a diverse audience, including TV & Film personalities and long-time Ulysses Trust supporters. The event was co-hosted by The Earl Cadogan DL, and Lady Janie Grosvenor who has now also joined the Trust as a Vice Patron.

Looking ahead, more Odyssey Circle events are planned for 2024, including engagements in Scotland, aimed at expressing gratitude to supporters from across the UK. Furthermore, a substantial endowment of £250,000 promised by The David & Christine Lloyd Jones Foundation further solidifies the Trust's financial stability.

Given the continued success of fundraising efforts, the Board of Trustees has opted to continue the fruitful partnership with Morgen Thomas Ltd, to underpin the means for The Ulysses Trust's future endeavours.

We are delighted that alongside our many long term supporters across a range of constituencies, our partnership with Team Forces has produced many new corporate partners which is reflected in the list of supporters and donors below. Our continued thanks go to:

4 Para Regt **Alastair Summers** Andrew Mitchell **Army Sports Aviation Focus Group BAE Systems Bernard Cazenove Brig Paul Orchard Lisle** C3IA Caledonia Investments Charles Russam Clive Richards Fdn. Colonel Julian Radcliffe Collins Aerospace David Blanchard **David Pinchard David Sykes** Diana Avis **Duke of Westminster Fujitsu** Gen Sir Mark Mans Genevieve Benest **Greater London RFCA** Ian Hannam Ian Parker Infrastar Jeremy Nayler Lord and Lady Fellowes Wessex RFCA

Lord Faringdon CT Lord Portsmouth Lowland RFCA MacRobert Trust Mark Disney Melville Petrie Microsoft Morgen Thomas Ltd **Neil Johnson** Neil Kerr Nick Addyman **Nigel Carr** Pen & Sword **RAF Charitable Trust** RAISOR Ltd Sir James Knott Trust Sir John Knott Sir John Nott Sir Simon Bryant Spectra Susan Yeomans **Team Forces** The Cadogan Charity The Grocers' Charity The Nuffield Trust Veterans' Foundation Virginia Gotla

David & Christine Lloyd Jones Foundation
Prince of Wales Charitable Fund
Smith Brothers of Leicester
The Gareth Neame Foundation
The London Freemasons' Charity
The Ulysses Trust Board of Trustees
William Henry 2nd Lord Leigh Memorial Fund
Worshipful Company of Armourers & Brasiers
Worshipful Company of Dyers
Worshipful Company of Fishmongers

We are **enormously** grateful to all our supporters and donors for your investment in our Reserve and Cadet Forces. Your support enables us to deliver incredible life-changing opportunities and improves Social Value for individuals, units and communities.

## 2023 EXPEDITION AWARDS

#### PRINCE OF WALES'S EXPEDITION AWARDS 2023

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, ambition, endeavour and planning. Award certificates will be presented at regional events throughout 2024. Further details will be announced on our website. Here are the winners for 2023:

# CADET CATEGORY EX: KWAZULU NATAL DDRAIG PAN WALES ACF

72 cadets and 15 Cadet Force Adult Volunteers (CFAVs) from Clwyd, Gwynedd, Dyfed, Glamorgan, Gwent and Powys ACF units undertook an expedition to South Africa's Zulu Natal region. Starting at Zingela Bush Camp, they split into groups to embark on a trio of 4-day activities including wildlife conservation, rafting 20km down the Tugela River and a trek covering over 80 km. They learnt about wilderness survival skills, campsite set-up and meal preparation.



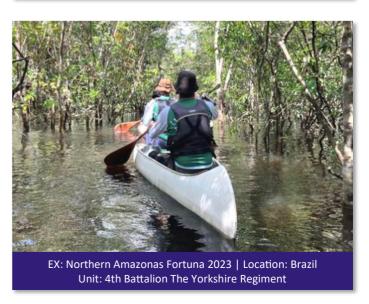
11 students and 2 instructors embarked on Greenland's notorious Arctic Circle trail - a journey of 167km with 4,100m elevation over 9 days and fully self-sufficient. A challenging expedition in an equally challenging environment. Participants were fully involved in the planning and preparation. This investment produced a determined effort during the trek, resulting in positive personal and team building outcomes.

# RESERVIST CATEGORY EX: NORTHERN AMAZONAS FORTUNA 2023 4TH BATTALION THE YORKSHIRE REGIMENT

13 reservists and 2 instructors undertook a kayaking/canoeing expedition to the Rio Urubu, Amazonas District, Brazil. A physically and mentally demanding expedition, conducted in one of the most bio-diverse and challenging environments on earth. They completed an arduous 227km paddle of the Rio Urubu (a tributary of the Great Amazon River) whilst remaining self-sufficient for 10 days 'on river' through uninhabited regions of the Amazon rainforest.







## **CLOSING COMMENTS**



#### **CHANGING OF THE GUARD**

Followers of The Ulysses Trust's annual review will detect some differences to earlier editions. For a start, it is now retitled 'Impact Report,' highlighting that it focuses on what really matters to our supporters – the differences that the Trust makes to its beneficiaries and to the communities and wider society of which they form a part.

Our followers may also detect changes to our organisation. In particular, we are delighted to welcome Tim Seal as our new Chairman who took over from Nick Kurth in August 2023. Tim comes from distinguished careers in the Reserve Forces and in business, and with considerable experience of working with other Service charities.

After 10 years, Nick determined that it was time for fresh hands at the helm. He took over at a critical time for the Trust. Not only had the founding Honorary Secretary, David Mallam, finally moved on shortly before but also the growing need for our help from cadets was stretching our resources – both financial and our team of enthusiastic volunteers. Charities were also becoming subject to closer public scrutiny and potential donors were bringing an increasingly rigorous approach to their support. We had to 'up our game' in terms of fundraising and governance. Nick led by example and was tireless in pursuing this agenda. The Trust is now significantly better known and respected, its supporter-base has

grown significantly, and levels of the activity it encourages have recovered to pre-pandemic levels, with continuing growth enabled by a robust balance sheet.

We had long recognised that the Trust was growing beyond the capacity of a volunteer organisation and that to ensure its long-term health and relevance a professional core might be needed at its heart. Nick's planned departure was the spur to grasping this nettle – a major step, fraught with risk and challenge for a small organisation, and a fitting finale to his legacy.

We were fortunate that three years previously, Polly Marsh had joined our Grants Applications Committee, and shortly after thoroughly earned her appointment as a trustee. An unexpected change to her personal circumstances placed her in a position to apply to become CEO. After a thorough and competitive selection process, she was appointed in May 2023.

In the months following, Polly has extensively reviewed our operations and priorities, and developed several new initiatives and alliances for undertaking our mission.

No organisation can stand still, and with new hands at the helm in Tim and Polly, there will be further changes. Nevertheless, I believe that the Trust has accomplished a delicate transition successfully, and its future is in excellent hands. It's perhaps time for the 'old guard' to move on and make these my final closing comments. We remain: "...strong in will / To strive, to seek, to find, and not to yield."

Philip Neame Founder and Vice Chairman

## WHO'S WHO?

**Patron** 

**HM The King** 

**Vice Patrons** 

The Earl Cadogan DL

ACM Sir Simon Bryant KCB CBE MA BA

Lt Gen Sir Mark Mans KCB CBE DL

Army Ex-Officio - CFA

MoD Ex-Officio - ACDS (R&C)

Rear Admiral Jude Terry OBE

RAF Ex-Officio - AOC No 22 (Trg) Gp

Brig Paul Orchard-Lisle CBE TD DL

Col Julian Radcliffe OBE QVRM TD

Lady Jane Grosvenor

Lady Lucy French OBE

Justin Packshaw MBE DL FRGS

**Trustees** 

Brig Tim Seal TD DL VR (Chair)

Lt Col Philip Neame MBE (Vice Chair)

**Professor Rod Stables** 

Sophie Fernandes

Andv Robertson

James Wilson

**Advisory Officers** 

Col Murdo Urquhart OBE - CE ACF & CCF Assoc

Col Nigel Thursby

Col Bernard Cazenove TD

Col Rex Stephenson CBE \*

Cdr Gary Bushell RN

Flt Lt Dave Hill RAFAC

**Professor Simon Denny** 

Professor Helen Dodd

Belinda Kirk

**Emily Bailey** 

**Ambassadors** 

Levison Wood

Tania Noakes

Sally Orange MBE

Ray Mears

Dr Wendy Searle

Louis Rudd MBE

Jordan Wylie MBE

**Hon Secretary** 

Lt Col Ian Orr MBE

**Hon Treasurer** 

Maj Stephen Wright TD

**CEO** 

Capt Polly Marsh DL

**Communications and Marketing Officer** 

Paul Randall

**Grants Applications Committee** 

Sqn Ldr Kev O'Brien FRGS RAF (Chair)

Col Chris Young \*

Surgeon Cdr Steve Mannion RNR

Cdr Sara Collen

Cdr (SCC) Noel Wheatley MBE RNR

Capt Neil Downing RN

Lt Col Nigel Carr \*

Lt Col Cath Davies MBE TD VR SCOTS

Lt Col Philip Neame MBE

Lt Col Dan Tebay BSc (Hons) PGCE MA FHEA \*

Maj Tony Simms

Maj Heather Sharp

Sqn Ldr Mike Blakey MBE FRGS CF RAFAC

Sgn Ldr Julian Mosses RAFVR(T) RAFAC

Sqn Ldr Jonathan Archer RAFR Regiment

Flt Lt James Dver RAFAC

Helen Birchall

**Dominic Goggs** 

Kate Hannaford

**Graeme Taylor** 

**Exped Reports/Minerva Apps System Admin** 

**David Preston** 

Jonathan Skinner

**Awards Officer** 

2Lt Nicola Rowlands-Smith

**Events Coordinator** 

Gary Rimay-Muranyi

Fundraising Consultants (Morgen Thomas Ltd)

**Robin Thomas** 

Robert Astick

Legal

Sarah Rowley, Charles Russell Speechlys LLP

\* Also Regional Representative.

Credits: Front cover Ex: Northern Alpine 23 2023, North West Officer
Training Regiment. Back cover Ex: Northern REMEC Winter 23 Part 2 2023,
Corps of Royal Engineers (REMEC). p17 Wendy Searle @martinhartley
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10 & 12); p7, 8, 10 & 12 Google Forms, Rucksack, Restaurant, Piggybank &
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Smashicons; Heat Wave made by Surang.

