

## Applying For a Grant (15 minutes reading)

### Part 1 — General Guidance

It is essential that you read all the information provided here before applying for a grant. This is to enable you to understand the purpose of the Trust, and what you must do when applying for a grant. The application form is straight forward but you must provide as much detail as possible to enable the Grants Application Committee to understand your expedition purpose, planned activity and outcome. If required additional exercise instructions or an intended programme of events can be sent to the Ops Director, providing more detail of what may be a complex expedition. A good application with all the questions answered first time, with all the information requested below stands a good chance of being assessed quickly and positively. The online form has the facility to save partially completed forms, so applicants are advised to start completion as early as possible.

#### Purpose of the Trust

The Ulysses Trust (UT) is a registered Charity that encourages and provides financial assistance for challenging expeditions and adventurous activities by the Volunteer Reserve (VR) and Cadet Forces of the UK.

#### Guiding Principles for Grants

- i. The Trust Deeds state that the Objects of the Charity to be:
  - promoting the education and life experiences of members of the Cadet Forces, particularly those from under-privileged backgrounds, in the interests of social welfare. To develop physical, mental and moral capabilities, as well as teamwork and leadership qualities so that their potential to become confident, resilient and successful members of society may be improved;
  - furthering the retention and efficiency of the Reserve Forces and the education of their personnel;
  - promoting interest and morale in the Reserve Forces and recruitment to them, by undertaking expeditions that have adventurous, scientific, or educational purposes.
- ii. Such expeditions may include individuals who are not themselves members of the Reserve Forces but whose presence nonetheless promotes the objects of the Charity.
- iii. The Trust emphasises that it provides financial support to units of the Cadets and Reserve forces to undertake challenging expeditions that:
  - Help to recruit and retain members.
  - Develop the characteristics of leadership and teamwork, self-awareness and values – including moral and physical courage, self-discipline, respect for others, integrity, loyalty, selflessness and humour.
  - Develop life skills such as resourcefulness, risk-awareness and judgement.
  - Develop the potential of those members to contribute to their units and society generally.

By so doing, The Ulysses Trust seeks to enhance the Reserve and Cadet Forces' contribution to community cohesion and society generally. It therefore places emphasis on inclusivity and is determined that opportunities it supports are available and affordable to all in believing such opportunities can have the most transformational impact on units and individuals from otherwise disadvantaged environments.

The Ulysses Trust is also keen to encourage expeditions or projects that add to social cohesion, embrace social action and/or community service at home or abroad, and is a pledged supporter of the #iwill campaign of the charity Step Up To Serve.

The Trust encourages involvement of Veterans in expeditions it supports, although it recognises that this will principally be through adult volunteers on cadet expeditions.

Whilst Motorsport is both physically and mentally demanding, the activity doesn't fall within our minimum impact environmental guidelines.

## **Eligibility**

All Volunteer Reserve (including University Units) and Cadet Forces are eligible to apply for a grant to help with the financial cost of mounting an expedition. Expeditions must be sponsored by a Unit or HQ, but participants can be drawn from multiple units or other Services, and have JSATFA, ACEATFA or other appropriate authorisation.

The Ulysses Trust does not, as a rule, support competitive sports, package holidays (like downhill skiing or scuba diving), or expeditions whose principal objective is to fundraise for other charities. It will however consider exceptions where the challenge or adventurous component justifies this. What might be challenging and adventurous for some may not be considered so for others. If in doubt, applicants are invited to discuss this with the Trust's Operations Director.

Normally, an expedition will be distinct from Adventurous Training activity on Annual Camps. However, in the case of Cadets, such activity on Annual Camps may be considered for support, if not eligible for support by public funds and accompanied by a convincing case.

The Trust does not support civilian expeditions, but it may support participants in civilian expeditions, particularly where it can be shown that an appropriate unit expedition is not readily available and that there will be long term benefit to the unit, provided their participation has unit or HQ sponsorship with appropriate service authorisation. Where service authorisation is inappropriate or impractical, this should be explained, with additional information to cover the issues of insurance and legal liabilities.

## **Grants**

Grants made range from a few hundred pounds for small or less ambitious expeditions to £5,000 or more for major expeditions or involving larger numbers. Occasionally, significantly larger sums are made for particularly ambitious expeditions, though it is essential to discuss these with the Trust's Operations Director at the outset of planning, ideally a year ahead, before applying. He can be contacted at [ops@ulyssesrust.onmicrosoft.com](mailto:ops@ulyssesrust.onmicrosoft.com) or [kev46@hotmail.com](mailto:kev46@hotmail.com) to arrange a suitable time for a phone call discussion. Grants are normally paid into applicants' accounts around 2 months before expedition departure, but if cash is required earlier, they should advise of this in the application (or notify the Ops Dir/Hon Treasurer).

The Trust endeavours to provide the greatest support to those with the greatest need. The object of the Trust grants is to reduce participant contributions to manageable levels for all. Grants are therefore made to the expedition, for the Leader to deploy in a manner that ensures optimum inclusivity. In the case of Cadets, we would expect the Leader to distribute the monies to those cadets on FSMs, or other Pupil Premium datasets. The aim is to enable all to participate, and for some families £20 is an impossibly large personal contribution, whereas others can afford to pay a significantly larger contribution. The Leaders

integrity is key, and knowledge of his/her cadets' personal circumstances must be considered when deciding how the funds are fairly allocated.

**NB - A grant can only be paid into a bank account which is quite clearly that (usually non-public) of a recognisable military unit, including a cadet force unit. In the case of a school Combined Cadet Force unit this may be one of the school's main bank accounts controlled by the school's financial staff or the OC of the school's contingent.**

**We occasionally are asked to for the funds are to be paid into an individual's personal bank account and this is not acceptable.**

### **Making an application**

Applications must be made through The Ulysses Trust Website. We have endeavoured to make the conditions and processes as simple and responsive as possible. Applicants should understand, however, that we are unable to meet all requests for our assistance, so we need sufficient information to ensure that our grants are distributed as effectively and fairly as possible and aligned to the Trust's purpose and objectives.

## **Part 2 – Conditions of Grants**

There are certain minimal conditions to grants. These are in order to:

- Demonstrate to the Trust's benefactors what is achieved with their support, and therefore to our ability to continue and grow our support for units in the future.
- Enhance the public esteem of Reserve and Cadet Forces.
- Encourage greater expedition activity through sharing of experience and knowledge.
- To satisfy the audit requirements of the Charities Commission that donations are put to best effect.

In accepting a grant from The Ulysses Trust, therefore, units agree to the following conditions:

### **Liability**

Applicants should note that, in allocating a grant, The Ulysses Trust is unable to make any judgement on the risk management and safety aspects of an expedition and accepts no responsibility for these or any other liabilities that might attach to the expedition. These remain the responsibility of the applicant/organiser of the activity and any approval authority.

### **Provision of an Expedition Report**

Reports, video and pictures of completed expeditions are vital to the Trust, are an absolute condition of receiving a grant, and are required within 28 days of returning from the expedition. They are published on the trust's website and may be used for other publicity purposes, so should comply with the requirements of the Data Protection Acts and Copyright Law. Further details are available in our Guide to Expedition Report Writing.

### **Social Media and PR**

Publicity, such as posts on social media sites, information on websites and articles in newsletters and magazines etc...is also a condition. This publicity is essential for generating future financial support for the Trust, so the more brand awareness for Ulysses Trust, the wider the target audience and reach the better. Cadets are extremely talented in creating and posting images and utilising the very latest technology to create videos and media posts that can be used by the unit's own social media platforms and websites. Articles in local magazines, or presentations to wider audiences, schools and other networks are all a bonus. Anything you can include that promotes the UT support of your expedition; all helps. Details of how this publicity will be organised are required on the Application Form.

All publicity should be accompanied by links to The Ulysses Trust website at [www.ulyssesrust.org.uk](http://www.ulyssesrust.org.uk).

- Twitter: @UlyssesTrust
- Facebook: @UlyssesTrust
- Instagram: @ulyssesrust

Please follow and share posts from the Trust to further raise our visibility.

### **Outcome Measurement Survey**

Units sponsoring an expedition are required to complete a short survey on outcomes from their expedition in respect of benefits to the unit, benefits to individuals, and support provided by The Ulysses Trust.

### **Ulysses Trust Funding of Expedition Equipment**

Procurement of equipment for expedition activity is not within the Trust remit and it cannot support grants for that purpose.

### **Expedition Awards Scheme**

The Ulysses Trust presents Expedition Awards for the VR, UOTC and Cadet expedition each year which the Trustees consider best achieved the underlying objectives of the Trust. Trustees base their judgement primarily on the Expedition Report/images/video and accompanying social media/PR.

## **Part 3 – How Grant Applicants (you!) Can Help The Ulysses Trust**

### **Give As You Live**

Every time you buy something online you could be supporting The Ulysses Trust at no cost to you through 'Give As You Live'. Visit the Give As You Live website and register as a supporter of The Ulysses Trust – it won't cost you a penny, but it means that thousands of online retailers will donate to us when you buy goods through their website.

Here's how you can help:

- When buying travel, accommodation, or anything for your expedition on-line, use Give As you Live.

- Tell your Expedition members, and others in your unit, and get them to tell their friends and families to sign up and use Give As You Live for all their on-line shopping. If they do so via the link on our website, we'll get an additional £5 donation as soon as they register!

## **Fundraising Events**

If members of your unit or their friends and families are thinking of taking part in an event, such as running a Half Marathon, or any other activity which lends itself to sponsorship, encourage them to make The Ulysses Trust their chosen charity. It's easy to set up on-line donations using our preferred platform. Please click the donate button at the top of this page. For more guidance, click here to visit our Fundraising Events page.

## **Corporate Sponsors**

By advising the Trust of the main suppliers (for example travel, equipment, insurance) to your expedition, you can help us identify opportunities for discounts or sponsorship in the future.

## **Social Media.**

Please follow The Ulysses Trust Twitter, Facebook and Instagram, and be sure to copy The Ulysses Trust into your social media activities relating to your expedition.

**If you think we have helped you, spread the word!**

## **Part 4 – Essential Information for Units Applying for a Ulysses Trust Grant**

### **Criteria for Financial Support**

In completing the application form, applicants and sponsoring unit commanders should think carefully about and show how plans and proposals are aligned to the objectives of The Trust, and the principles for grants and how such outcomes will be assessed and demonstrated.

The secondary factor is Need. The Trust is particularly focused on making opportunities it supports affordable to all, regardless of means or background. Applications which show a clear commitment to this inclusivity, and can demonstrate cases of special need, will receive more sympathetic consideration.

The information you supply regarding the breakdown of income and expenditure which will be recorded as accurate - if there are any changes to these figures, you must advise us in your post expedition report.

### **Socio-economic factors to consider**

**We do not want specific information on individuals – but we do want an overall picture of the group's socio-economic circumstance. Please include any relevant information about the participants as a group only. In respect of cadets, please consider the percentage of those who are on Free School Meals or may come from under-privileged backgrounds, or face specific challenges such as social deprivation, low incomes, inner city locations, rural isolation etc. Do consider all Pupil Premium factors, such as children in care, service children, or looked-after children, or have Special Educational Needs (SEN) especially Social, Emotional and Mental Health problems (SEMH), and those Not in Education, Employment or Training (NEETs) or have a social care worker or a family intervention worker, or are in alternative education.**

Recording, in the Application Form, whether any Cadets on the expedition are in receipt of Free School Meals and/or other Pupil Premium funding, is therefore obligatory. It is appreciated that this can be a sensitive matter even when Detachment commanders know their cadets well, and information not always forthcoming. For those cadets where the detachment commander believes the cadet is likely to be FSM/PP, but cannot be sure, the *Don't Know* field should be used. Do NOT use this field if you know that cadet is NOT in receipt of FSM/PP funding. Please note that for Army Cadets, a confidential system is in place where expedition leaders can look up the FSM status of their cadets if they feel unable to ask directly – please ask your unit commander or our UT Ops Director if needed. Pupil Premium (PP) includes children on FSM, as well as those in care, service children, or looked-after children, or have Special Educational Needs (SEN) especially Social, Emotional and

Mental Health (SEMH), and those Not in Education, Employment or Training (NEETs) or have a social care worker or a family intervention worker, or are in alternative education.

#### Environmental and Sustainability Policy Statement

The Ulysses Trust considers the natural environment to be a valuable and irreplaceable asset, which is currently under threat from climate change and human exploitation. All expeditions and activities in receipt of grants from the Trust shall aim to be sustainable. Expeditions must give due consideration to their impact on the environment and ecology of the area in which they are run, and shall endeavour to minimize their carbon footprint.

Questions to consider. See More on our “Eco and Culture considerations” page of our website (<https://www.ulyssesrust.co.uk/grant-applications/environmental-and-cultural-considerations>)

Q. Is my grant dependent on being my expedition being sustainable?

A. The Grant Awarding Committee (GAC) will expect to see that you have considered environmental and sustainability issues during your exercise planning and these should be explicitly stated in your grant application.

Q. Does my expedition have to be carbon neutral (Net Zero Carbon)?

A. Your expedition does not have to be carbon neutral, but the GAC will expect to see that you have taken appropriate steps to reduce or minimize your carbon footprint wherever possible, such as the use of sustainable transport modes (e.g. shared or public transport) and low carbon accommodation choices (e.g. camping).

The following factors are also considered:

- The value for money derived from the Grant. The Trust is keen to encourage aspiration, ambition and the particular benefits to be gained from expeditions to exotic places, but it also recognises that UK-based expeditions can also deliver great value at lower cost.
- The contribution of expedition members to its leadership, planning and execution. The Trust recognises that sometimes 3rd Party support is essential, but keen to encourage self-sufficiency.
- For cadet applications, the number of Armed Forces Veterans helping the expedition.
- Whether it includes an element of voluntary social action/value or community service, and to what extent that reflects the principles of the [#iwill](#) campaign.
- The degree of broader scientific, educational or developmental content which may enhance the value of an expedition and benefit individual participants.

- Other benefits accruing, such as training potential for future leaders for VR and Cadet Force expeditions, or the gaining of qualifications (by way of example, these might include specific Adventurous Training (AT) skills, Duke of Edinburgh Award qualifications, CVQO or ILM certification).
- The public interest value, with particular emphasis on scale, objectives, location and characteristics of expeditions which can claim to be unique and thus attract media interest; or what, why or how local interest can be generated.
- The number of VR and/or Cadet Force members on the expedition.
- The potential of the unit to fundraise, the effort made to acquire other funds, and the difficulty of so doing.
- Whether adult participants are paid and in receipt of CILOR or not, the reasons for this, and the level of commitment and contributions of the sponsoring unit.
- The level of essential personal contributions as a proportion of the overall costs.
- The originality and degree of challenge in mounting and undertaking the expedition.
- The Commanding Officer's statement on his reasons for supporting the expedition, and outcomes expected. This should consider, inter alia, the overall impact or return from the grant to the individuals, unit, the VR or Cadets, The Ulysses Trust, and local communities /society generally.

NB. Time spent crafting the expedition application and providing accurate detail will expedite the process and present your expedition application in the best light to the Grants Application Committee. We recognise the importance to expedition planners of the speedy response to applications for funds. A good application with all the questions answered with all the information requested above stands a better chance of being assessed quickly and positively.

## Part 5 – The Applications Process

Applications for grants will only be accepted through the On-Line Application Form which can be found under the link "**Grant Application Form.**" Bids should be submitted at least two months prior to the start of the expedition. Exceptionally, late bids may be considered.

The online form has the facility to save partially completed forms, so applicants are advised to start completion as early as possible.

Formal approval of the expedition by the appropriate Service or Cadet Authority, and political clearance where necessary, is normally required. The sponsoring officer (usually the Unit or Establishment Commanding Officer) is to certify on the online form that the expedition has that approval, and will be conducted in accordance with the regulations of the appropriate Service authorities. **Applications should be submitted on time even if political clearance and confirmation of numbers have to follow (this should be annotated in the box (eg, 'JSATFA clearance applied for')**

A grant may take the form of:

- A 'top-up' grant, providing flexible and responsive financial support for expeditions unlikely to attract external sponsorship, in order to help make the opportunity affordable to all members of a unit (a 'top-up' grant).
- A 'pump-priming' grant, providing early funds for major, high-profile and costly expeditions during the early critical phase of a project, to enable planning to proceed. These expeditions would normally be ambitious and remote, with senior level endorsement of the parent service, and / or an appropriate service association, club or learned society. Such endorsement together with a grant

from the Ulysses Trust provides the potential to attract further financial sponsorship and support. **In such cases, and certainly if considering a bid of more than £10,000, expedition planners should contact the Operations Director as early as possible and before submitting a formal application, for an informal discussion on the support that the trust might be able to provide.**

### Other Benefactors?

Any information reflecting that the expedition organiser has not just applied to the Trust? Unit fund raising etc.

Applicants should note:

- Grants are made for the support of a specific expedition as outlined in the unit application. **It must be used exclusively for that expedition**; it may not be used for payments to other sponsors or charities.
- **How the grant is used is then up to the discretion of the Expedition Leader and Unit Commander.** Grant money should be directed towards those whose need is greatest, in the judgement of the Grant applicant.
- Applicants are advised to ask for what is needed and not to inflate the sum on the basis it may suffer a percentage cut. A realistic, well-justified application will be better received.
- Grants of up to £10,000 may be authorised by the Applications Committee; grants in excess of this require the authorisation of the Trustees. In the latter case, supplementary information may be requested, so late applications will rarely be considered.
- Organisers of expeditions involving major up-front costs are advised to discuss their plans with the Operations Director Kevin O'Brien & Polly Marsh ops@ulysses-trust.onmicrosoft.com or kev46@hotmail.com as early as possible and prior to submitting an application in order to determine the extent of UT's possible involvement.
- It is particularly important that all applications include comprehensive and robust income and expenditure totals for all eligible participants, although it is appreciated that in pump-primer applications, figures may be estimates. It must include the total of the expected personal contributions from all entitled (Reserve or Cadet) expedition members.
- Remember you **MUST** tell us how many Cadets are on Free School Meals or Pupil Premium. For VR and UOTC applications, the figures will be zero.
- Cadet Expedition Applicants: It is important that you advise, where requested on the Application Form, the number of Adult Instructors who are Armed Forces Veterans.
- Applications should be carefully scrutinised for accuracy before final submission. Applicants will be notified by e-mail of the status of their submission.