

Applying for a Grant – General Guidance

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 in order to:

- Enhance their morale, recruitment, retention, and public esteem; and to
- Help develop the characteristics of leadership, teamwork, confidence, initiative, self-discipline and judgement of their individual members.

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. Exceptionally grants will be made for individuals taking part in civilian run 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. In such cases, individuals will still need to be sponsored through a Unit. Examples of civilian organisations that might be approved are: British Exploring Society, Outposts, Raleigh International, and Trekforce.

Levels of Grants

Grants made range from a few hundred pounds for small or less ambitious expeditions to £5000 or more for major expeditions involving larger numbers. Occasionally, significantly larger sums are made to particularly ambitious expeditions, though it is essential to discuss these with the Trust at the outset of planning, ideally a year ahead, before applying.

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.

It is important that applicants also read Advice to Units Applying for a Grant, before submitting an application.

Click here for [Advice to Units applying for a Grant](#)

Click here for the [Grant Application Form](#)

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:

Provision of an Expedition Report. Reports and pictures of completed expeditions are vital to the Trust, 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 Act and Copyright Law. Click here for: [Expedition Report Guidelines](#)

Joint Promotion of Expeditions. Sponsoring Units and Expedition Participants should also be prepared to meet reasonable requests to help promote the Trust and Reserve and Cadet Forces. This might take the form of a Presentation, or if you have a good story to tell, cooperating in the production of PR material.

Social Media. Expeditions should copy the Ulysses Trust into their social media activities.

Expedition Procurement. The Ulysses Trust is registered with 'Give As You Live,' an on-line shopping gateway which contributes a percentage of all purchases made through the gateway to the purchasers nominated charity. Expedition leaders can help other grant applicants in future, by using this gateway for expedition procurement of travel, equipment insurance etc where possible. The link to use is: <http://ulyssesrust.co.uk/fund-raising/give-as-you-live>.

What More Can You Do For the Ulysses Trust?

The Trust does not have an endowment, and raises funds year-by-year in order to provide grants to expeditions. In addition to the basic conditions of a grant, we ask recipients to make unit and expedition members aware of the help received from the Ulysses Trust, and promote ways in which their their friends and families can help the Trust help others. Click [here](#) to see how a few simple steps can help.

Ulysses Trust Annual Best Expedition Awards Scheme.

The Ulysses Trust presents 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 and accompanying imagery, and entry is automatic on its receipt. It's a great way to raise the profile of your unit, so follow up a good expedition with a good report!

How Grant Applicants can help the Ulysses Trust

Here are some simple actions you can take us to help to help others like you in the future:

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. More detail is at: <http://ulyssestrust.co.uk/fund-raising/give-as-you-live>. 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, 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.

Fund Raising 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. For more guidance, click: <http://ulyssestrust.co.uk/fund-raising/fundraising-events>.

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 on Twitter and Facebook, and copy the Ulysses Trust in your social media activities relating to your expedition..

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

Advice to Units Applying for a Ulysses Trust Grant

Introduction

This advice complements and extends the brief information given in DIN Reference 2010DIN07-120 dated August 2010.

Criteria for Financial Support

The Ulysses Trust provides grants to expeditions in order to:

- Enhance morale, recruitment, retention, and public esteem of Reserve and Cadet Forces; and to
- Help develop the characteristics of leadership, teamwork, confidence, initiative, self-discipline and judgement of their individual members.

In completing their application form, applicants and sponsoring unit commanders should think carefully about and show how their plans and proposal are aligned to these objectives, and how such outcomes will be assessed and demonstrated. This will be the primary consideration in appraisals of bid by the UT Applications Committee.

The following factors are also considered:

- The originality and degree of challenge in mounting and undertaking the expedition.
- The contribution of expedition members to the leadership and planning.
- 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 or ILM certification).
- 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. *Note: Grants are not normally more than 33% of overall expedition costs.*
- The backgrounds, any special aspect to, and needs of the participants.
- The steps taken to ensure the inclusivity of the opportunity.
- The scientific and technical, educational or community service content which may enhance the value of an expedition.
- The public interest value, with particular emphasis on scale, objectives, locations and characteristics of expeditions which can claim to be unique and thus attract media interest.
- 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.

The Applications Process

Applications for grants will only be accepted through the On-Line Application Form 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.

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 On-Line 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.**

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 potential to attract further financial sponsorship and support. **In such cases, and certainly if considering a bid of more than £5000, 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.**

Applicants should note:

- 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 £5,000 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 at opdir@ulyssesrust.co.uk 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 accurate income and expenditure totals for **all** eligible participants. It must include the total of the expected personal contributions from all entitled (Reserve or Cadet) expedition members.
- The Ulysses Trust does not, as a rule, support competitive sports, package holidays, or expeditions whose principal objective is to fundraise for other charities. The Applications Committee will however consider exceptions where the challenge or adventurous component justifies this.
- The Trust does not support civilian expeditions, but it may support participants in civilian expeditions, provided their participation has unit or HQ sponsorship with appropriate service authorisation. Individuals participating in expeditions for whom a JSATFA or equivalent service authorisation is inappropriate, will need to provide additional information to their application (in CO's Comments Box) to cover the issues of insurance and legal liabilities.
- Applications should be carefully scrutinised for accuracy before submission. Applicants will be notified by e-mail of the status of their submission. Difficulties should be reported to the Ops Director at opdir@ulyssesrust.co.uk.

Expedition Reports

Reports are vital to the Trust, and providing us an Expedition Report is a condition of any grant. The report is to be identified by the UT Expedition Grant number, and submitted as an email attachment to the Report Reviewer (report@ulyssesrust.co.uk) not later than 28 days after completion of the expedition.

The report will be used for publicity purposes, the public face of your expedition, so should:

- Describe how individuals, your group and unit have benefitted from the experience, particularly in the context of the objectives of the Ulysses Trust. Give examples and quotes. *This is the most important part of your report, and explains to readers the true value of the expedition.* (In the case of Cadet expeditions, also consider input from teachers and parents).
- Be succinct, informative and engaging as it will be published on the Ulysses Trust website (www.ulyssesrust.co.uk).
- Be written by a member of the expedition in a journalistic style avoiding service format, abbreviations and jargon. Assume that readers have no prior knowledge about your expedition.
- Outline objectives, location: dates, participating unit(s), and numbers participating.
- Explain the challenges that particular individuals and the group faced, highlighting key achievements and interesting incidents. Individual stories and quotes are invariably of interest and help bring the report to life.
- Be supported by pictures, to bring the report to life. There should be at least 4 (preferably more) sharp action photographs, with captions explaining what is going on, and including one group shot. They should be high definition and preferably accompany the report as attached JPEGs (NOT embedded in an email or the report).
- Video is also welcomed, either on dvd by post, or uploaded to youtube, with the link to it included in your report.

Any questions on format or requests for further guidance should be emailed to the Report Reviewer before the report is submitted. Failure to submit an appropriate report could affect the response to future grant applications.

All reports and photographs received on time are entered into the annual competition to recognise the best VR, Cadet and UOTC expedition.

A list of your main suppliers (and money spent with them) may help us to negotiate discounts or sponsorships in the future.

For grants of £5000 or more, a separate assessment of the expedition outcomes is required from the sponsoring unit CO or senior Training Officer.

Notes:

1. *As reports will be used by the Trust for publicity purposes, to comply with the Data Protection Act and Copyright Law, you should ensure that individuals featuring in a report are content to be identifiable and that those taking photographs are content for them to be used unless they have assigned copyright to the expedition.*
2. *The Trust also welcomes other material for publicity purposes, such as video diaries, journal or other work which may have formed part of the expedition objectives.*

Enquiries

For expedition or application enquiries, or to suggest how our support, and the process of applying for it, can be improved, please contact:

The Ulysses Trust Hon Operations Director,
Wing Commander Roy McCluskey,
Tel: 0208 409 0255
E-Mail: opdir@ulyssesrust.co.uk