



"It might be tough, lack of sleep, taking part in the watch-system, pulling ropes, taking the helm, climbing the mast(s) - but you can be sure when leaving the Pelican at your final port of call you will feel like a sailor, or rather you will BE a sailor - go for it!"

ADVENTURE UNDER SAIL

DEVELOPMENT PLAN

JULY 2020



“It was an unforgettable trip that I would recommend to anyone. All the people in charge did a great job organizing everything. The trip was a perfect fit for my part of life. The places were great, the experience even better. You got to know beautiful places and experienced unique things. Not to forget the things you learned about yourself, others, the ship or the countries. A big thank you again to the Ocean College team and of course the crew and teachers.” [Ocean College Trainee 2018/19].

“Sure, I'm still me. But my way of seeing and thinking is different. I go around better and calmer with stress, anger, grief and things I can't change anyway. I've gained a certain composure. I have also become very aware of how the world works. Economically as well as between people.” [Ocean College Trainee 2018/19].



“It was one of the best experiences of my life so far. It's so intense being out on a boat for a week with people you don't know but I'm after making friendships that I know will last a long time. I'd do it again in a heartbeat” [Sail Training Ireland Trainee May 2019].

Contents of this Document

Executive Summary and Vision	Page 3
1 Background, Context & Strategic Aims Sailing, The Tall Ship Pelican, Adventure Under Sail the charity	Page 4
2 What we do – Core Objectives Sail Training, Maritime Careers, Ocean Science, Affordable voyage fees, Greater capacity within five years	Page 4
3 Operational Capability Human and physical resources, financial resources, risk management key partnerships and strategic alliances	Page 11
4. Operational plan to 2025	Page 16



Supporting this Development Plan are two supplementary documents:

1. "Adventure Under Sail Development Plan July 2020 – Main Appendices", and
2. "Evidence, Research & UK Policy Context for the work of Adventure Under Sail".

Executive Summary & Vision

“To provide real life experiences and an alternative form of learning for all young people, encouraging equality, inclusiveness and passion through adventure and challenge. Our programme promotes personal growth, opens opportunities for diverse career options and promotes the importance of environmental conservation.”

- I. Adventure Under Sail is a registered charity (www.adventureundersail.com) and the owner of the Tall Ship Pelican of London. Its objectives are to support the development of young people, building their resilience, self-confidence, and independence by:
 - Using sail training programmes enabling them to discover their abilities, values, passions and responsibilities in situations that offer adventure, challenge and the unexpected.
 - Offering unique ‘Maritime Careers’ opportunities to learn about life on-board, safety at sea, seamanship, navigation, engineering, teamwork and much more. Participants may already be apprentices or this may be their first step towards a career within the maritime sector.
 - Offering voyages for studying ‘Ocean Science’, changes to the marine environment and climate to young people who care passionately about safeguarding the planet.
 - Working to ensure that voyages are open to all young people by seeking to subsidise costs for those that cannot pay.
 - Expanding sail training capacity and specialist voyages over the next five years, to meet increasing demand.
- II. The ship has berth capacity for up to 30 trainees and 13 crew and volunteers (in normal circumstances but can be extended to a total of 47) and has been undertaking sail training voyages since 2007. We aim to sail for 48 weeks every year; around the UK and Europe from April to October, and in the autumn and winter period on educational transatlantic voyages.
- III. We work in strategic partnership with charities and community organisations, education providers, vocational trainers, port authorities and local councils, to offer a unique and life-changing experience to all who sail with us, and an economically beneficial leisure and tourist attraction to ports and communities.
- IV. Over the next five years we will actively pursue opportunities to expand, by chartering or owning additional vessels, and we will continue to work with other vessel owners to ensure that capacity is increased to meet growing demand.
- V. To achieve these aims, our financial model requires voluntary income from grants, donations and fundraising to subsidise voyage fees, which ensures that young people from socially excluded backgrounds are able to sail with us. A current three-year sponsor’s funding arrangement ends in April 2021 and we therefore need to seek new sources and build our financial resilience and organisational capacity.
- VI. As members of the global sail training family we do not work in isolation. We are a member of the Association of Sail Training Organisations (ASTO), the UK’s National Sail Training Organisation which supports the UK Sail Training industry, and in turn are a member of Sail Training International, representing the UK’s sail training sector and facilitating international exchanges. See <https://www.uksailtraining.co.uk/>
- VII. Governance, health and safety and risk management are strong, and regular maintenance of the ship is undertaken with annual certification provided by the UK Government Maritime and Coastguard Agency (MCA).



1 Background, Context & Strategic Aims

1.1 Maritime Heritage & Sail Training

The recorded history of humankind at sea extends back more than 4000 years, during which sailing ships, the use of wind power, physics and mathematics led to the exploration of the oceans, establishment of new trade routes, communications with other cultures and growth in trade and wealth. By the early 20th century steam or diesel shipping took over the maritime industry, relegating sail largely to the picturesque, to heritage, and to romanticism. However three important factors have kept tall ships in the public eye since the mid-20th century. These are maritime heritage and history, training in maritime careers and sail training as a means to support personal development¹

The Tall Ship Pelican of London and the charity Adventure Under Sail deliver activities to address all three of these factors. This Development Plan sets out how sail training on the Pelican will continue to be used to meet and enhance a variety of individual, societal and charitable strategic objectives.

1.2 The Tall Ship Pelican



Pelican of London is a 45-metre three-masted square rigged tall ship, one of only two that now operate from the UK. Her unique rig and sail plan is derived from Barbary Coast pirate ships of the 1570s and her clipper hull gives a unique performance to windward with a great turn of speed. With accommodation for up to 35 students and up to 13 crew there are six cabins for permanent crew, a further cabin used by volunteer crew, and seven student cabins of which five are ensuite.

1.3 Adventure Under Sail

Adventure Under Sail (AUS) is a UK-registered not for profit company (number 06569266) limited by guarantee, and charity (number 1124276) registered with the Charity Commission for England and Wales. It was formed in 2008 initially as a small charity managing funds to provide bursaries for young people undertaking sail related activities, and in 2012 took ownership of the tall ship Pelican of London. Its principle strategic aims as set out in its Memorandum & Articles of Association are:

“....to educate young people, through the provision of sailing or sailing related activities and other training and so as to develop their physical, mental, and social capabilities so that they may grow to full maturity as individuals and members of society and their conditions of life may be improved”.

The charity operates the ship primarily as a sail training vessel for young people, in the northern hemisphere during the spring and summer months mainly around the UK and Europe, and during the autumn and winter months on a six-month transatlantic educational voyage.

Adventure Under Sail has three employees and four trustees. Crew are recruited via a marine agency and are employed on the ship on a rotational basis, from a cohort of experienced sailors. The charity's office is at Sharpness Shipyard and Drydock in Gloucestershire, UK. The following sections set out our core objectives, operations and strategic direction

¹ Acknowledgement for input into this summary page to “Tall Ships Today”, Nigel Rowe, Bloomsbury, ISBN-1-4729-0346-4

2. What We Do: Core Objectives

2.1 Core Objective One: Sail Training

Independent research on the social impact of sail training, and the UK Government policy context within which AUS operates and to which our core objectives respond is set out in a separate document, which is available if required. The personal development of young people and their ability to contribute to society has been a key strategic objective for most recent UK Governments, and the current policy framework clearly identifies needs to which sail training is a highly effective response with significant short, medium, and long-term social impact. Raising educational attainment levels and developing character are key areas of need in the development of our young people as they move into adulthood, so that they can contribute fully as members of society and enjoy long rewarding lives. Sail training responds directly to these outcomes.

2.1.1 Our Offer

Over 12 years Adventure Under Sail has used traditional sail training programmes to engage young people helping them to discover their abilities, values, passions and responsibilities in situations that offer adventure, challenge and the unexpected. Pelican of London is an ocean-going sail training ship, registered and equipped for off-shore, expeditionary voyages. The ship has been specifically designed to give young people an exciting, exacting and exhilarating seafaring experience. This enables them to enjoy life, make new friends, build confidence and resilience, work as part of a team, use perseverance, initiative and leadership to experience life at sea in diverse conditions and sail a tall ship. These are all valuable life skills that will improve their job prospects and equip them for life.

Sail training takes components of other land based, outdoor adventure activities – such as overcoming challenges to achieve goals, working as a team, being isolated from the outside world and learning new skills – and effectively combines them with factors that can potentially make the impacts stronger. While elements of these factors are shared with other experiential activities, the specific challenges and unique physical environment of sail training can result in a very distinctive experience, which can have life changing impacts. Activities are grouped broadly into three categories: self-knowledge and personal development; knowledge and learning; and social skills.

Although it is clearly an attraction for many, learning to sail in itself is not the essential goal of sail training. Nor is it just an opportunity for an adventure. The value and power of sail training derives from its unique combination of characteristics to develop:

- the character of young people
- their resilience
- self-confidence, and
- independence

2.1.2 Personal development and self-awareness

Throughout the voyage trainees are set challenging but achievable goals, requiring them to apply new skills in an environment that often takes them outside their comfort zone, leading to new challenges and a sense of achievement and increased levels of self-confidence and self-esteem. Through the successful completion of tasks which carry a degree of perceived risk, or by trainees being trusted with responsibility for tasks with real consequences (tasks which impact the successful sailing of the ship), trainees learn about their ability to be in control, despite challenging external variables such as sea state or weather.

By trainees completing unfamiliar tasks they may have been reluctant to undertake, perhaps unpleasant domestic chores or climbing aloft, and realising that they can overcome their fears, cope with being outside their comfort zone, they develop increased resilience, resourcefulness,

personal-discipline and belief in what they are capable of achieving. Opportunities to reflect during team debriefs and to be listened to by staff and peers, provide trainees time to consider their achievements which can further cement positive personal development.

2.1.3 Knowledge and learning

During a voyage, trainees learn a wide range of skills including:

- sailing and seamanship
- domestic chores (a first for some!)
- an understanding of food hygiene
- awareness of maritime careers
- an appreciation of global environmental issues particularly within our oceans and coastline
- critical thinking and problem solving.

Putting learning into practice can be more engaging than learning in environments within formal education where problems can seem abstract, whereas on a voyage, trainees can immediately see the impact of the decisions they and their peers make. In good examples of sail training, staff employ techniques such as effective questioning to maximise this impact. As a result, trainees may have a stronger sense of purpose for learning and greater motivation to learn new skills. In combination with the personal development outlined above, these experiences are likely to improve young people's aspirations and contribute to them be more engaged in learning.



2.1.4 Social skills and Team Building

Having to live in close quarters—sharing living space with people they don't know, sleeping in the same room and eating meals together - is an intense social experience. The result can be the creation of lasting friendships and an increased understanding of the need for patience, respect and tolerance of others in order to create a positive social environment.

Trainees have to work effectively as a team and face common challenges to complete tasks necessary for the voyage. Success helps them to value good teamwork, creating a stronger sense of common purpose. The 'risky' environment evokes feelings of vulnerability and discomfort which acts as a leveller and intensifies the impact of teamwork, both because trainees are more likely to feel reliant on their peers and because feeling vulnerable may mean that they let go of 'masks' (bravado or other social identities). Sharing feelings of vulnerability and mutual reliance result in a stronger sense of equality, particularly where trainees support each other through common challenges. Participating in a voyage with people from diverse social or ethnic backgrounds can also help bridge social gaps, which would simply not happen in their usual life.

This combination of intense socialisation, teamwork and the equality of social interaction results in a strong sense of community, where social differences and reputations from 'normal life' become less important. As a result, trainees have more respect for, and sensitivity towards, their peers. Positive social experiences may also impact their sense of personal identity and promote self-awareness, as they begin to see themselves as they are seen by their peers rather than the identities they hold in 'real life'.

2.2 Core Objective Two: Maritime Careers

- 2.2.1** All Adventure Under Sail crew are qualified to required maritime standards and have extensive experience working with young people on a variety of vessels. Qualifications include Master 3000 unlimited; Chief Mate; Officer of Watch 3000; and our Engineers are Marine Engine Operator Licensed or above. Some of our crew are also qualified RYA sailing instructors.

It is perhaps surprising that many land based, industrial maritime employer apprenticeships do not actually provide or offer the opportunity for any time at sea, as the providers often do not have the direct resources and time to deliver this important element of education, understanding and experience.

During a Maritime Careers voyage on board Pelican of London, trainees are given the opportunity to learn about life on-board, safety at sea, seamanship, helming a vessel, working aloft (up the rig), navigation, engineering, rigging and splicing, sail repair and much more. Most importantly those participating work as a team within a routine environment of 'watches' and are challenged to undertake new tasks, all of which provides personal development that will be of benefit in maritime careers, or indeed in any career path chosen.

- 2.2.2** On-board voyage crew also work to complete Royal Yachting Association (RYA) courses such as competent crew and/or watch leader certificates. While gathering sea time, qualifications and work experience voyage crew will be learning skills that will benefit them in any employment in the industry. They are given advice on sea time, qualifications and career routes, and leave with a letter of reference and a training record book to support any future employment application.
- 2.2.3** AUS continues to offer further development opportunities through shore-based career mentoring and networking days. Voyage crew are also offered discounted rates on Maritime Coastguard Agency (MCA) courses through our partners, which include Basic Safety Training, Approved Engine Course and VHF radio. AUS can also offer participants further sea time and development through continuing maritime career voyages and volunteering positions.
- 2.2.4** Maritime skills are all taught by industry experts in a friendly and supportive environment, supported by employability mentors teaching interview technique, CV writing and employability skills. We plan to extend this offer working in partnership with the maritime industry and educational organisations.
- 2.2.5** This programme is unique amongst sail training vessels. Whilst many sail training vessels do provide training in the practical application of sailing, there is not the same emphasis on training young people for future working in the maritime industry. Likewise, young people leaving boat building or maritime colleges or on apprenticeship schemes may have a good base of practical qualifications, but little hands-on experience on a ship, which cannot be easily incorporated within this type of training. With this in mind, a partnership is being developed with the internationally renowned Lyme Regis Boat Building Academy in Dorset, UK. Our practical educational training on Pelican of London can deliver on this most important, sea based, life experience and training.

2.3 Core Objective Three: Ocean Science

- 2.3.1** The United Nations has declared a Decade of Ocean Science for Sustainable Development, running from 2021 to 2030. Many of today's young people care passionately about action to safeguard the planet, especially mitigating the effects of climate change. Scientific understanding of the ocean's responses to the many anthropological pressures is fundamental to delivering this.

AUS are developing a number of partnerships including Universities, Chambers of Commerce and Local Authorities to create an alternative learning platform, providing an exciting classroom for young people who may not be easily engaged by orthodox approaches. Therefore, we have worked with scientists from the University of Plymouth to create a programme based on solutions to marine based environmental challenges.

The aims are to:

- Inspire young people from all backgrounds to protect our seas
- Have a practical Ocean Science syllabus including scientifically accurate research that will be completed with all young people who sail aboard to increase awareness of environmental issues
- Have ocean scientists and industry experts sail with us to teach, conduct research and inspire passion in young people from all backgrounds
- Provide life skills and knowledge of work options within the Maritime and Ocean Science sectors
- Provide Pelican of London as a research platform to university students or passionate individuals who do not have access to research vessels, for advanced studies
- Feed scientifically accurate data back to universities and science institutes

This programme can be tailored or adapted to cater for all different age groups and needs, and can support and include aspects of the National Curriculum.

2.3.2 We enable young people to experience the oceans and coastlines in a way that would not otherwise be possible, exploring amazing habitats, learning why they are important, and showing the impact of humanity on our seas. Many young people who sail with us have never even visited the coast, let alone sailed or seen the life below the waves. Our Ocean Science syllabus is mapped to the National Curriculum, but is based upon practical research that is not possible in a formal educational setting.

This will also aid current Science, Technology, Engineering, and Mathematics (STEM) agendas. Allowing young people to experience how STEM subjects relate practically to the sea, introducing them to the wide range of industries dependent on marine environments, and potentially to increase the number of young people considering careers in the Maritime and STEM sectors. For this purpose, Pelican of London is able to:

- Become a sailing oceanographic studies centre equipped to take a set of oceanographic observations using established practice.
- Adapt and make cost effective, easy to use oceanographic sensors, and equip the ship as an ocean-going transporter for marine sensors.
- Design, develop and run inclusive and diverse aspirational leadership programmes that inspire, encourage and educate young people to effectively create, lead, manage and implement environmental sustainability initiatives.
- Build an international oceanographic community of interest enabling young people to study, monitor, evaluate and share knowledge, knowhow, technology and data using a linked network of marine sensors through dedicated online platforms.
- Act as a catalyst for further international, citizen science, oceanographic collaboration. Build the partnerships to effectively deliver and finance the project.
- Become a media production and communication platform able to create rich media content to both record research projects, support online educational programmes and near real-time content for social media campaigns.

2.3.3 While our three sailing priorities are Sail Training, Maritime Careers and Ocean Science it does not necessarily follow that time on board ship is set aside only for one of these priorities, for they are not mutually exclusive. While our core objective is sail training for young people and the vast majority of our annual programme is geared towards this, during these voyages, career

aspirations can be nurtured, cadets can be trained and ocean science can be studied, and therefore while we will structure voyages primarily for one of the three programmes, we will always remain open and flexible to the possibility of voyages accommodating any mix of the three objectives.

- 2.3.4** While AUS operates a fully inclusive and welcoming approach to its activities, it seeks, where possible, to give priority for the sail training experience to young people from socially excluded backgrounds. As set out in Operational Priority 2 of our Operational Plan, over the next five years we will seek to provide greater support to those who cannot join our voyages due to lack of finance, and to young people with mental health and wellbeing issues. Where we may not be able to accommodate those with particular needs or disabilities, we will direct them to other sail training organisations who have staff and vessels specifically trained/adapted to meet specific needs.

2.4 Core Objective Four: Make our voyages financially accessible to all

- 2.4.1** Voyage fees (payments made by individuals or groups for berths on Pelican) do not meet all of the fixed and variable costs of running the charity, leaving an annual funding gap which has to be met from income from external and charitable sources. Fee levels charged by 'not for profit' sail training providers are lower than the commercial fees charged for private holidays aboard commercially run tall ships. Setting fees at this commercial level would exclude many young people, especially those from more deprived backgrounds who would simply not be able to afford them. Young people from disadvantaged and excluded backgrounds can be those who often make the most progress from what we offer. Voyage fees are paid to AUS by the chartering organisation, some of whom are funded partially or entirely by the families of the young people sailing, or by their own and/or individual fundraising efforts of the young people themselves.
- 2.4.2** We wish to keep voyage fees as low as possible so that voyages remain accessible to all. As a consequence, our financial model involves securing income from grants, donations, sponsorship and general fundraising. While we will aim to reduce our dependency on these income streams by negotiating voyage fees to achieve higher cost recovery, where appropriate, we will not increase them to such a level that results in the exclusion of some young people, and reducing our social impact, as this would conflict with our overall objectives.
- 2.4.3** It is for this reason that we place great importance on bidding to external charitable organisations and potential sponsors, to seek their support for the overall work of the charity and for delivering these outstanding and worthwhile, sea-based training programmes. We will also seek out and facilitate the awarding of voyage bursaries.

2.5 Core Objective Five: Expand sail training capacity to meet ongoing business needs

- 2.5.1** We are passionate about sail training and the benefits demonstrated through the development of young peoples' lives. ASTO member organisations provide Sail Training voyages to over 10,000 young people a year, of whom 400-600 sail with AUS on Pelican of London; we wish to see this number increase.

The Pelican's voyage crew capacity is usually set at 30, and with the average voyage in the summer being between 7 and 10 days our capacity is limited in this respect. We do collaborate with other sector members to deliver larger capacity voyages, but this is not easy to achieve with separate organisations and vessel owners. It is a sad fact that in recent years some tall ships have been unable to operate in the UK because of financial unsustainability, contributing to a reduction in overall capacity. There may be an opportunity for AUS to take on one or other of these vessels to increase its own, and sector, capacity.

Over the next five years we will actively pursue opportunities to expand AUS operations, to include chartering, managing or owning additional vessels. We have been invited to deliver multiple voyages of length: for example, growing demand for our Ocean College voyages is such that we will at some point require multiple vessels. We have regular requests for other voyages such as circumnavigations, and we could often “double book” for the popular weeks in June and July. Furthermore, an additional vessel would afford flexibility in delivering maritime and science programmes alongside other voyages, and a smaller vessel could offer younger trainees an opportunity to get a taste of sail training on day-sails or weekend voyages in preparation for sailing with Pelican.



3. Operational Capability

3.1.1 Human and physical resources

The charity took ownership of Pelican of London in 2012 by way of a generous charitable donation. Between 2007 and 2017 the ship was based in Weymouth, since when its base has been Sharpness Shipyard near Gloucester, where all maintenance and repair works and most Maritime and Coastguard Agency (MCA) inspections take place.

Key operational factors are as follows:

- We have three permanent staff: the Chief Executive Officer, Operations Manager, Development and Partnerships Manager, and one temporary member of staff assisting with programming.
- There are currently 4 trustees with a diversity of backgrounds and experience with plans to recruit additional trustees to extend the range of skills available
- Our financial accounting function is sub-contracted to Sharpness Shipyard
- Crew are not direct employees, but contractors recruited via Sea Mariner, a specialist marine recruitment agency. Since 2017 we have built up a strong and reliable cohort of highly skilled enthusiastic and experienced crew members and when on board they are under the direct control of Adventure Under Sail.
- Additional volunteer crew are required for all voyages and we have a cohort of around 90 volunteers on whom we can call.
- Voyage trainees take a full part in the sailing of the ship, daily routine and activities rota. Until the Spring of 2020 the ship could accommodate up to 28 trainees during the Spring/Summer season, and up to 32 during the Autumn/Winter voyage. Our capacity has now been increased to 30 in the Spring/Summer and 33 in the Autumn/Winter seasons. More detail is provided in Appendix A.

3.1.2 Our primary aim is to sail for 48 out of 52 weeks in a year, the remaining 4 weeks set aside for maintenance and inspection. Operational regulation and compliance is set by the UK Government Maritime and Coastguard Agency (MCA); the ship is therefore required to undertake stringent annual certification. Risk management is strong and AUS has a suite of policies to satisfy all health and safety and safeguarding requirements, which are a priority. A detailed technical specification of the ship is provided in Appendix B.

3.1.3 Our sailing programme is assembled between 12 and 24 months in advance, effectively giving us a 2-year rolling programme based around ports who pay us to attend for various celebratory events and other partners, such as Sail Training Ireland, who commission the ship for voyages in between and across port visits. During the northern hemisphere spring and summer months the ship sails in UK and European waters, and in the autumn and winter months it undertakes a 6-month transatlantic voyage in partnership with Ocean College, which is based in Germany, sailing young people from the UK and Europe to north Africa and across the Atlantic Ocean to the Caribbean and Central America, before returning via Bermuda and The Azores. Maintenance and inspection work is usually undertaken in May and again in September.

3.1.4 Since 2016 AUS has made significant changes to its business model. Prior to this we were a provider of somewhat ad-hoc or opportunity voyages and consequently carrying all of the risks of failing to generate the berth income required for voyages to be viable. We have now become an organisation that has formed key alliances and delivers bespoke, contracted, voyages with strategic partners. This has been a transition which has been critical to achieving the long-term sustainability of the charity. Partners now charter the ship with its crew for a voyage which delivers AUS's key objectives, such that the partner pays a fee to AUS and carries the risk of generating berth income from its trainees, with the result that AUS is protected from financial risk. However, the model still requires AUS to generate additional income from donations and grants.

3.1.5 AUS has a comprehensive website at www.adventureundersail.com where voyages can also be tracked on a real time basis.

3.2 Key Partners

3.2.1 Since the decision was taken to change the AUS business model, the development of relationships with partner organisations and potential charterers of the ship, has been key to delivering our objectives. These relationships are founded on trust and transparency. All existing relationships will continue to be nurtured and new ones explored. The two most rewarding at present are those with Sail Training Ireland and Ocean College, both of whom charter the ship for substantial periods of time each year, and with whom AUS has close relationships. Learning from these, we will seek other such similar partnerships, and the table in Appendix C sets out those potential partners identified to date.

The partnership with Sail Training Ireland: STIrl is a charity, formed in 2011 but with a long history going back well before then, that funds the development of young people from all backgrounds and all abilities on the island of Ireland – that is Northern Ireland and the Republic of Ireland - providing them with the opportunity to participate on voyages on Pelican and other sail training vessels. While they obviously learn about sailing it is more about learning from the whole experience. The exciting adventure offers the participants the opportunity to overcome fears, push boundaries and take on new responsibilities in a challenging environment. The experience promotes self-confidence, develops leadership, resilience, teamwork, communication skills and an understanding of diversity. It often has a profound effect on the participants' outlook and can be life changing. The experience promotes self-confidence, develops leadership, resilience, teamwork, communication skills and an understanding of diversity.

<https://www.sailtrainingireland.com/>

Alongside this partnership development, we have increased the Pelican's accommodation to enable us to take youngsters interested in developing a career at sea during the summer season to increase their sea-time and knowledge working alongside our permanent professional crew. With an ongoing emphasis on personal development within our permanent crew, we plan to enable youngsters to develop into deck and officer roles as we support their professional development.

3.2.2 Target partners are front line delivery organisations, mainly not-for-profit, whose strategic objectives align closely with our own, and who would either:

- Use Sail Training for young people's growth and development, and/or
- Offer vocational training for those seeking a Maritime Career, and/or
- undertake a voyage pursuing marine scientific or other research.

The partnership with Ocean College: Ocean College is a social enterprise based in Germany offering extracurricular learning to young people from throughout Europe aboard the Pelican of London. During the six-month trip, Ocean College relocates school to the Atlantic Ocean. The students become the voyage crew and participate in running every aspect of the ship including land-based educational expeditions. This experience brings challenges that encourage personal development: 24/7 teamwork, reliability and social responsibility which foster self-control and resilience. An individual coaching concept as well as the integration of external practitioners and experts underline the claim: beyond school. The College has delivered highly successful 6-month voyages each year since it was established in 2016. Our voyages depart a European port each October and return in April the following year. We also undertake a 'Summer Camp' voyage with OC each summer and Language voyage whilst in Caribbean.

<https://oceancollege.eu/en/enocancollege-beyond-school/>

3.2.3 Relationships with Local Authorities, Port Authorities and other sail training providers are hugely important, for both AUS and local partners, to enable us to deliver our key objectives and to promote the places we visit. Tall ships attract tourists: Pelican is one of 40 tall ships in the UK and one of only two large square-rigged vessels currently operating, and around 100 worldwide, which regularly participates in local Tall Ship Festivals in the UK and Europe. As a one of 33 not-for-profit members of the Association of Sail Training Organizations (ASTO), the UK's National Sail Training Organisation, and indirectly Sail Training International, AUS will always seek to participate as a responsible member of the tall ships family. AUS has developed strong relationships with many Port Authorities and Local Authorities in the UK and Europe, and over the last three years also in North Africa, Central America and the islands of the Atlantic Ocean, and will continue to seek out new relationships with others.

3.2.4 AUS does not therefore work in isolation. Membership of ASTO enables it to benefit from the following:

- Bursary support for young people.
- Training and development of crew and staff
- Participation in events such as Tall Ships Races.
- Working closely with regulatory and governing bodies such as the Maritime & Coastguard Agency (MCA) and the Royal Yachting Association (RYA) to ensure appropriate levels of training and regulation exist within the Sail Training industry.
- Sharing best practice.

3.3 Finance and Funding

3.3.1 The financial year for the charity is 1st May to 30th April. As a registered charity the annual accounts of AUS are Independently Examined according to company law, charity law and accounting requirements, and are publicly available from both the Charity Commission of England and Wales and the UK Companies House. A summary of recent years' financial performance and forecasts through to 30 April 2022 is given below, and in more detail in Appendix D.

Year ended 30 April	2018	2019	2020	2021	2022
	IE*	IE*	MI	Forecast	Forecast
Earned income	83285	378665	582083	463168	675206
Donations	357313	327868	179982	180000	120000
Other grants	3939	3224	85466	150000	150000
Other income	148	25	33039		
Total Income	444685	709782	880570	793168	945206
Running costs	479187	708573	868539	739727	870000
Repairs & Maintenance	67170	68938	30000	50000	60000
EBITDA	-101672	-67729	-17969	3441	15206
Depreciation	32899	34832	0	0	
Net Surplus/deficit	-134571	-102561	-17969	3441	15206
Total Funds c/f	817587	715026	697057	700498	715704

*Independently Examined

3.3.2 In 2017, the business model was changed to that of a contracted provider of voyages so as to increase use of the ship, achieve greater social impact, and to reduce financial risk. In 2017/18 earned income was low because there was a major mechanical failure and a substantial repair and improvement programme was undertaken supported by donations and soft loans. This

enabled the ship to become fully operational for most of the 2018/19 year. Its first and very successful Ocean College autumn and winter transatlantic voyage took place from October 2018 to April 2019. After a healthy UK and European Spring and Summer sailing season in 2019, the ship undertook its second, again very successful, transatlantic voyage from October 2019 to April 2020.

3.3.4 Growth in participation over the last three years confirms that our decision to change the model was correct:

	Spring & Summer 2018	Autumn & Winter 2018/19	Spring & Summer 2019	Autumn & Winter 2019/20
Number of trainees who sailed	270	32	405	32
Number of berth days sailed	1834	5792	3700	5760
Percentage of capacity full	57%	100%	84%	100%

3.3.5 In line with other providers, our 2020 UK and European programme has been severely affected by the impacts of the Covid-19 pandemic, with most planned voyages either cancelled or postponed until 2021. However, a UK circumnavigation voyage is confirmed for August and September 2020 followed by an October departure of the 2020/21 Ocean College 6-month voyage, which has been fully booked since early 2020. Due diligence has been exercised in relation to public health advice to enable these voyages to take place.

3.3.6 Our pre-pandemic April-October 2020 planned programme was to be our strongest yet, with earned income forecast at £305K (compared to £272K in 2019 and £110K in 2018). Building upon good partner relations and what would have been a successful 2020 summer programme, the 2021/22 programme as it currently stands is included as Appendix E, and is already full, subject to final confirmations of three provisionally booked voyages. In response to the pandemic and programme cancellation we have reduced costs down to the minimum necessary to care for and maintain the ship during the non-sailing weeks. During this enforced non-operational period, the ship has been in dry dock at Sharpness for maintenance, including inspection and works, together with some internal reorganisation to increase berth capacity and in preparation for voyages later in the year. Staff have been furloughed, crew have been stood down, but we have been proactive and have received grants of almost £100K and a UK Government-backed “bounceback loan” of £50K to enable us to survive despite the absence of earned income.

3.3.7 Earned income from voyage fees is not sufficient to meet all costs, because of our objective to keep voyage fees paid by trainees as low as possible. Over the last two years we have improved cost-recovery by transparent discussion with established clients, who understood the need for price increases, without putting them beyond the reach of those we wish to serve. Within our 2020/21 programme we are still subsidising each trainee by an average £30 per day.

3.3.8 Analysis of prices for similar tall ships voyages shows that fees are around £85-£90 per day by charitable providers, and £115-£150 per day by commercial providers.

3.3.9 For the foreseeable future therefore, as well as fee income, the AUS business model will still be reliant upon voluntary income from grants, donations and fundraising to support its charitable objectives. Historically the charity has been supported by a single private benefactor, but this is to change, because we are now in the final year of a three-year agreement with this benefactor, after which the expectation is that this annual commitment will be reduced. Therefore new funding is required and this will be sought from a combination of:

- targeted trusts and foundations

- commercial sponsorship
- crowdfunding
- other fundraising

Grants will be sought from charitable trusts and foundations and from appropriate commercial sponsorship. Ideally, we will be seeking multi-year sponsorship agreements where these are available, but we will also bid for single-year and project-specific grants. Schedules of potential sources are in Appendices F and G.

Financial forecasts are produced on a rolling basis and updated for each quarterly board meeting with a comparison against actuals, so effective financial governance and risk management can be ensured.

3.4 Governance and Management

3.4.1 Responsibility for governance and the strategic direction of the charity belongs to its Board of Trustees who are also the company directors. The Board meets physically at least four times a year, and virtually via Zoom or Skype at least another four times a year. Currently there are four board members, but following a skills audit undertaken in the Spring of 2020 a trustee recruitment process is underway seeking to appoint at least two more trustees during 2020.

3.4.2 The Chief Executive Officer and staff team implement the strategic plan, and report to the board monthly and at board meetings. Details of AUS' Trustees and Staff are in Appendix H.

3.4.3 Risk Management: AUS has a risk register and a monitoring and review process to ensure that risk management remains embedded within the AUS ethos and across all areas of the organisation: Strategic Risk, Governance Risk, Financial Risk and Operational Risk.



4.0 Delivering our Core Objectives – our five-year Operational plan to 2025

Over the next five years we will be working on the following operational priorities in order to deliver our core objectives and charitable objects:

Operational Priority 1: Achieve Financial Sustainability		
Aims: 1.1 A positive forecast at least 12 months in advance with scope for development investment. 1.2 To be independent of historical benefactor's funding		
Short term activities – 0-2 years	Medium term activities – 2-5 years	How will we know we have achieved the Priority?
<ul style="list-style-type: none">• To have chartered Pelican for 98% of the period between July 2020 and May 2022 on terms that should allow us to be at least cashflow neutral• Between July 2020 and April 2021 to have applied to trusts and foundations and commercial partners for new grant funding and sponsorship funding to raise a minimum of £150K per annum beyond April 2021	<ul style="list-style-type: none">• Raise additional funds to become more viable with a view to building reserves, provide scope to increase our resources and plan voyages that are more widely available to disadvantaged groups in and beyond 2022• Develop additional working partnerships and seek voyage charters for the period 1st May 2022 to 30 April 2025• Incrementally negotiate greater cost-recovery from voyage charterers• Establish direct giving facility, eg Justgiving page, on website• Establish a membership of supporters, Friends of the Pelican, to secure additional regular donations	<ul style="list-style-type: none">• ¼ equivalent of annual expenditure in reserves.• Loans reducing at an advanced rate• Forward booking of sailing programmes is beyond 24 months• Benefactor's donations are predominantly used for bursaries (that are non-essential) and no longer for core costs• Supporter regular donations are achieving the equivalent of at least 10% of core costs
Operational Priority 2: Make our voyages accessible to all.		
Aims: 2.1 To provide greater support to young people who cannot join our voyages due to lack of finance. 2.2 To expand our offer to young people with mental health and wellbeing issues.		

Short term activities – 0-2 years	Medium term activities – 2-5 years	How will we know we have achieved the Priority?
<ul style="list-style-type: none"> • Use bursary funding to facilitate an increase in the number of young people from disadvantaged backgrounds accessing our voyages • Prioritise Sail Training Ireland voyages that are in themselves accessible to those who cannot afford the full fee • Seek out and work with other potential partner organizations who support young people to achieve strong mental health and wellbeing. • Ensure we can refer trainees to suitable alternatives where we are unable to meet their disability or other special needs 	<ul style="list-style-type: none"> • Raise funds through grant applications, partnerships and sponsorships to be able to offer bursaries to a wider audience • Have partnerships in place to promote and offer collaborative voyages for trainees with a wider range of needs 	<ul style="list-style-type: none"> • There is a year-on-year increase in the number of disadvantaged young people accessing our summer programme • There is a year-on-year increase in the number of vulnerable or higher needs trainees
Operational Priority 3: Strengthen and extend our partnerships		
Aims: 3.1 To grow our pipeline of strategic partners who provide direct services to young people, to become future charterers of the ship 3.2 To expand our network of intermediary strategic partners who will facilitate relationships with future charterers of the ship		
Short term activities – 0-2 years	Medium term activities – 2-5 years	How will we know we have achieved the Priority?
<ul style="list-style-type: none"> • Derive more value from existing partnerships • Extend the length of existing arrangements • Seek engagement with potential new front-line delivery partners to begin explanation of the value we can bring to their mission and their beneficiaries, including with the owners of other vessels • Seek engagement with potential new intermediaries, eg Local Authorities, Port Authorities, Education & Training providers 	<ul style="list-style-type: none"> • Review how existing partnerships are contributing to our longer-term plans. • Identify objectives to achieve additional mutual benefit with existing partners – eg each partner introduces us to at least 1 new partner per annum • Identify pipeline of new partnerships and complete Social Impact analysis and Value for Money analysis 	<ul style="list-style-type: none"> • Existing partnerships will generate a minimum of 75% of earned income and 400 trainees each year • Earned voyage income from existing and new partners achieves at least 80% annual cost recovery, to enable more young people from socially excluded backgrounds to sail with us. • The pipeline of voyage charters from existing and new partners is 36 months

Operational Priority 4: Develop the capacity of our organisation in order to meet growth in demand for our offer.

Aims:

4.1 Review HR functions to improve responsiveness to internal and external demand.

4.2 Review our approach to marketing

4.3 Recruit new trustees to provide a broader skills set

4.4 Extend range of our sail training, maritime career and ocean science programme and ships available for use

Short term activities – 0-2 years	Medium term activities – 2-5 years	How will we know we have achieved the Priority?
<ul style="list-style-type: none">• Review key activities and functions, to identify which should be undertaken by permanent staff, and which could be outsourced, contracted or delivered by agency staff, which through strong partnerships can bring added value.• Calculate the benefit and pilot the workstream. An example would be social media/PR/comms• Initiate a conversation with ASTO and all UK non-profit sail training providers about development of a National Sail Training Strategy• Commence recruitment of further trustees.• Continue to strengthen our reputation and profile, in particular by improving our online and social media presence	<ul style="list-style-type: none">• Secure additional core or ring-fenced financial resources for agreed activities• Employ additional staff where cost/benefit has been agreed and long-term risk assessed• Agree employment terms with key senior crew in order to retain their commitment	<ul style="list-style-type: none">• Workstreams achieved within agreed working hours• The annual costs of FTE staff are always within budget• Balance of permanent FTE versus outsource or agency withstands scrutiny• Trustee board in place with 6-8 trustees from appropriate backgrounds and skill sets.

Operational Priority 5: Maintaining and investing in Pelican of London to protect long term operational investment

Aims:**5.1 Maintain Pelican of London's value either as a ship to deliver voyages for AUS or as a saleable asset****5.1 as AUS's primary operational ship, maintain her to a suitable standard so that she is fit to deliver the required chartered voyages over the plan's period**

Short term activities – 0-2 years	Medium term activities – 2-5 years	How will we know we have achieved the Priority?
<ul style="list-style-type: none">• Continue to roll-out the planned maintenance programme across all aspects of the ship's operation• Identify further partners/sponsors who will invest specifically in replacement parts/services to ensure that PoL is always maintained to current industry standard?• Continue to work with Sharpness Shipyard to provide consistent maintenance and development of PoL's services	<ul style="list-style-type: none">• Develop industry standards and training programme that can be shared across other vessels• Upgrade services ahead of expected failure to avoid loss of time and create improved perception• Have a rolling 10 year maintenance and improvement programme that is financially deliverable.	<ul style="list-style-type: none">• Online access to up to date and audited Planned Maintenance• Minimise lost sailing time and positive feedback on PoL services• Sight of a maintenance and improvement plan and sign off for expenditure

Continuing to look forward.....

Adventure Under Sail has been supporting the personal development of young people since 2012 by delivering sail training voyages and transformative experiences on the tall ship Pelican of London. Since 2017 when its offer was expanded, it has given additional exciting opportunities to experience the activities, demands and fulfilment of a career at sea, and to explore the world of environmental and climate change by studying Ocean Science. Following changes to its business model in response to growing demand, the ship now sails for 48 weeks a year, offering a unique and potentially life-changing experience to many more young people with complex needs and from socially excluded backgrounds.

The organisation is responsive to demand, has built strong and lasting partnerships and has a renewed sense of direction and place in the sail training market. We know what we want to achieve in the next five years and how to get there. Through strong governance and effective change management, this Development Plan sets out how AUS will continue to deliver its core charitable priorities through to the year 2025.



"I am more self-confident and express my opinion more clearly. I am more open and hardened about difficult situations. Besides, I always feel the need to do something. I am clearer about what I want and more sensitive about our environment."
[Ocean College Trainee 2018/19].



"Amazing vessel, amazing people, they give me such great opportunities and I am very thankful! Starting my Naval engineer training in February 2018!" [Jacob, January 2018]

"It might be tough, lack of sleep, taking part in the watch-system, pulling ropes, taking the helm, climbing the mast(s) - but you can be sure when leaving the Pelican at your final port of call you will feel like a sailor, or rather you will BE a sailor - go for it!" [Tim, June 2017]

