

TRUST MATTERS

Andrew Slater, Chairman of the Trustees, reports on Trust activities over the last year

We are delighted to record that 23,618 hours of Partners' time was awarded to charities through the Golden Jubilee Trust scheme last year, the most in a year so far. The number of awards also rose and 51 Partners gave their talents and skills, enabling charities to achieve objectives that otherwise would have been difficult or impossible.

Under the terms of our Trust Deed, GJT awards are made to the charity, which means it is the charity's need that is considered first and foremost, for which they are extremely grateful. But we also recognise that it delivers enormous benefits and opportunities to the Partners. We know, too, that this is a scheme that is highly valued by external audiences and we were re-accredited with Business in the Community's Big Tick award in the Healthy Communities sector.

The Golden Jubilee Trust is a registered charity, number 1079195, so each year we report to the Charity Commission as well as to Partners, now through the Partnership Community Investment Committee (PCIC). This is the account of the Trust's activities since its last report in July 2008 and also a look to the future.

HOW THE AWARDS ARE MADE

The charity secondments are decided by the Trustees at selection meetings, two of which were held last year. The number of awards which can be made at any one of those meetings depends on the length and cost of the requests, and the money we have available to meet them.

HOW AWARDS ARE FUNDED

An endowment of £5m established the Trust in February 2000, with the intention that it should be invested and set up to be a long-lived scheme. So the Trustees have a duty to secure the long-term health of the fund, which we have to balance with our legal duty to use the funds for the purposes of the Trust. In previous years, if we have had unspent income, we have sometimes used it to increase our investment fund.

The awards are not made from the capital but from investment income from the fund. In 2008-09 the trust's income was £193,036. We made commitments of £294,321 to the awards. That level of commitment above our income for the year was partly because experience has shown



ABOVE: Claudette Henry at the Mary Seacole Nursery

that each year some agreed secondments do not take place, or Partners are not replaced in their branch, which results in the full estimated cost not being used. It was also because we had some unspent income from previous years. The Trustees use cash flow information at each meeting to ensure the award costs can be covered. In 2008-09 we spent £231,056 on awards, and our net current assets decreased by £40,975 to £34,273.

WHO RECEIVED THE AWARDS

A complete list of successful Partners and charities can be found on JLPnet, and PartnerConnect. Those charts demonstrate that there is no 'typical' profile. Applications arise in various ways: Partners have found their own charities (often through first-hand experience); have discovered an opportunity through JLPnet; or have extended existing branch support for a local charity. The scheme really is open to all.

THE APPLICATIONS

Each year we develop the application questions and we believe the standard of application has improved. The best requests were simply the ones which were well thought through. They showed why the charity's work was important and gave good reasons why the secondment was needed. They demonstrated the Partner's skills

and motivation to do the work, showed detail, including a breakdown of time needed, and demonstrated ongoing benefits. The Trustees looked for reassurance that the charity was well regarded locally, that the work would be valuable and that the Partner would be able to do what the charity needed in the time available.

Last year, requests to help local communities and youth outweighed the others while support for environmental work fell away. This time we were pleased to see, and support, applications from all categories and participation from 21 different John Lewis/Corporate branches and 12 different Waitrose/Bracknell branches.

OBJECTIVES IN GRANTING AWARDS

Our target is to grow the number of Golden Jubilee Trust secondments in line with the growth of the Partnership and for all Partners to have an understanding of the scheme. To that end, we want each John Lewis, Distribution, Production and Head Office branch regularly to achieve an award each year, with a comparable number from Waitrose. This level of awards demonstrates that the scheme is available to all, keeps it alive in Partners' minds and maintains participation levels through personal knowledge.

CHALLENGES

We believe we face three challenges at the moment: maintaining the fund for the future and meeting the current rising number of requests, which are interlinked; and maintaining the offer as the Partnership grows.

MAINTAINING THE FUND

We were not immune from widespread falls in the value of investments and, disappointingly, our fund was at just under £4m at the year end. The fund has risen and fallen in the past and when income has exceeded the cost of secondments we have, on occasions, reinvested funds but last year we decided to use it all to support the applications. Naturally, reduced income makes decisions on balancing support for current applications against long-term sustainability more difficult. However, for the future we will continue to monitor anew at each meeting and consider the impact of any fall in income. For example, we might perhaps review and issue new guidance on the length of secondments requested.



RISING NUMBER OF REQUESTS

It is really encouraging to see growing interest in the scheme and a rise in the number of applications. However, we are aware that we are also having to turn away or limit some requests as current funding cannot meet them all. Last year five applications were unsuccessful and 10 were reduced in length, either to allow more secondments to be made or because the time requested was thought not to match the tasks.

We do want to make as many awards as possible, to benefit the maximum number of charities, but it rightly remains a competitive scheme and the awards are not made lightly. We have to consider which applications will deliver the most effective help where it is most needed and where the effect will be the most long-lasting. And, we have to keep in mind that our foremost duty as Trustees is to deliver support to charities, rather than to put the Partner's or the branch's needs first.

We recognise that a great deal of time, effort and emotional energy goes into most applications and that there is real disappointment when a request is turned down. But we know that most Partners and the charities are aware of, and prepared for, the competition and do not presume success.

MAINTAINING THE OFFER

We know that we are not unique at the moment in struggling to make our income go as far as possible but for the future, as the Partnership's

YOU CAN DO IT TOO

Every Partner can apply to take up a Golden Jubilee Trust secondment regardless of the job they do, the hours they work or the length of their service. The secondment can be as short as one week or last a maximum of six months, and can be either full or part time. What matters above all is that the secondment fits with the needs of the charity. Partners from every area of the business have worked in a huge variety of charities from the local to the national in support of causes as diverse as conservation and the hospice movement. In doing so they have made use of a wide range of skills and talents from computing to copping.

You can see the full list of the 2008 secondments and details of where Partners worked, and for how long, on JLPnet:

[JLPnet > Partner Choice > Partner Giving > Golden Jubilee Trust > Award Details](#)

Applicant	Secondment Branch	Charity
Andrew Chigbo	Stratford Road, CSB	Watford African and Caribbean Association
Jenna McArthur	John Lewis Aberdeen	The Archie Foundation
Lucy-Claire Windle	John Lewis Cambridge	Cambridge and County Folk Museum
Deborah Anne Dawson	John Lewis Oxford	Victim Support
Rory Murray	John Lewis Edinburgh	Street League, Glasgow
Audrey Harley	John Lewis Glasgow	Chest Heart and Stroke
Lee Winstanley	John Lewis Liverpool	Team Oasis
Maureen Ross	John Lewis Liverpool	Marie Curie
Pauline Mills	John Lewis Newcastle	The National Trust
Angela Robinson	John Lewis Nottingham	Childhealth Advocacy International
Lee Gensler-Woodcock	John Lewis Nottingham	Childhealth Advocacy International
Natasha Friend	John Lewis Oxford Street	ATTEND
Liliana Perez Barrera	John Lewis Oxford Street	LatinLink
Louise Rogers	John Lewis Reading	LatinLink
Elizabeth Rummery	John Lewis Peterborough	RSPB
Lisa Hull	John Lewis Sheffield	Nomad Homeless Advice & Support Unit
Karen Bennie	John Lewis Southampton	Countryside Education Trust
Margaret Powell	John Lewis Trafford	Manchester Cathedral Country Home
Mark Schueler	John Lewis Watford	POWER International
Laura Wilson	John Lewis Welwyn	Hope for Children
Linda Cudmore	John Lewis Welwyn	Hertfordshire Action on Disability
Alia Malik	John Lewis.com	Medical Foundation for Victims of Torture
Kay Ruby	Corporate Victoria	The Bridge Trust Corporation
Mark Girdler	Waitrose Yateley	Yately Industries for the Disabled
Carol Mcdermott	Bracknell	Age Concern
Helen Dunning	Waitrose Lincoln	Hill Holt Wood
Martin Kirkby	Aylesford	RSPCA
Tricia Rutter	Waitrose Epsom	Lantern Arts Centre
Jason Windle	Aylesford	Young Enterprise
Lindsay Stoll	Waitrose South Woodford	Haven House Hospice Children's Hospice
Celia Claypole	Waitrose Barry	International Tortoise Association

financial situation allows, we would ask the PCIC to commit more money to the GJT fund as the Partnership grows. We would welcome the opportunity to meet the committee to discuss it.

As the number of branches increases we will be unable to maintain the offer at current levels across all branches and to meet our objectives in terms of spread of awards. We know that a certain level of competition for awards is healthy and can raise standards. However, experience and feedback on application forms has shown that the most powerful advertisements for the Trust, and the greatest encouragement for others to get involved, come from personal knowledge of a Partner who has received an award. Without additional funding, first-hand knowledge of the scheme will be lower and we believe that interest and applications will go into decline, and this unique scheme will be diminished.

THE TRUSTEES

There are seven Trustees, as governed by the Trust Deed, who hold office for two years: one appointed by the Chairman, three appointed by the Trustees themselves, and three elected by the Partnership Council. Currently they are Andrew Slater, appointed by the Chairman; Prue Beard, Vivienne Riddoch and Roger Jefcoate, appointed by the Trustees; and Gretha Dignan, Gemma Lacey and Mark Anderson, elected by the Partnership Council. This year the term of office for the Council-elected Trustees was extended in line with the Partnership Council review and elections. 9

GOLDEN JUBILEE TRUST AWARDS SPRING 2009

NAME AND BRANCH	CHARITY
Andrew Chigbo Greatham Road CSB	Watford African and Caribbean Association
Jenna McArthur John Lewis Aberdeen	The Archie Foundation
Lucy-Claire Windle John Lewis Cambridge	Cambridge and County Folk Museum
Deborah Anne Dawson John Lewis Cheadle	Victim Support
Rory Murray John Lewis Edinburgh	Street League, Glasgow
Audrey Harley John Lewis Glasgow	Chest Heart and Stroke
Lee Winstanley John Lewis Liverpool	Team Oasis
Maureen Ross John Lewis Liverpool	Marie Curie
Pauline Mills John Lewis Newcastle	The National Trust
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Helen Dunning Waitrose Lincoln	Hill Holt Wood
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GOLDEN JUBILEE TRUST - DONATIONS BY DIVISION

		JOHN LEWIS (INC CORPORATE)			WAITROSE (INC BRACKNELL)			PARTNERSHIP TOTAL			9-YR TOTAL
		2006	2007	2008	2006	2007	2008	2006	2007	2008	
TOTAL NUMBER OF PARTNERS SUPPORTED	TOTAL	33	33	34	15	12	17	48	45	51	382
NUMBER OF AWARDS GIVEN BY TYPE OF ORGANISATION											
	Environmental	2	6	2	3	2	0	5	8	2	42
	Disability	5+1*	7	4	4	2	0	9	9	4	51
	Medical/Care	10+1*	3	5	1	2	3	12	5	8	78
	Elderly	1	1	1	1	0	0	2	1	1	13
	Homeless	1	0	3	1	0	0	2	0	3	12
	Youth	4+1*	4	7	3	3	5	7	8	12	74
	Community	8	9	8	1	1	7	9	10	15	80
	Arts	0	0	1	0	0	0	0	0	1	8
	Animals	1	2	2	1	1	2	2	3	4	21
	TOTAL	32	32	33	15	11	17	48	44	50	379
NUMBER OF BRANCHES PARTICIPATING											
		18	19	21	12	11	12	30	30	33	

* = Corporate secondments