

TRUST MATTERS

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

In this, the 10th anniversary year of the Golden Jubilee Trust, we are delighted to add another record to the Trust's set of results, this time in the number of Partners achieving awards in a single year.

Last year 59 Partners were successful in their bids to support their chosen charities by exchanging their Partnership work for a new role at the charity. Collectively these Partners contributed 21,399 hours in which their talents and skills enabled the charities to achieve objectives that might otherwise have been difficult or impossible for them.

We are a registered charity, number 1079195, and report each year to the Charity Commission. We also update Partners through this report to the Partnership Community Investment Committee (PCIC). Under the terms of our Trust Deed, GJT awards are made to the charity, which means that it is the charity's need which is considered first and foremost. This unique element, combined with the fact that all Partners are eligible to apply, enables the scheme to offer a huge pool of talent to charities to realise their ambitions and achieve results. We also recognise that it delivers enormous benefits and development opportunities to the Partners taking part, and Partners are increasingly referring to their personal development plans in their trust applications.

This time we are not only recording last year's results but considering the cumulative effect of the scheme over the last 10 years, as well as looking 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 a meeting depends on the cost of the requests, calculated by the length of secondment and the Partner's pay, and the money we have available to meet them.

HOW AWARDS ARE FUNDED

Ten years ago an endowment of £5m, agreed by the then Central Council, established the Trust, with the intention that it should be invested and set up to be a long-lived scheme. The trustees, therefore, have a duty to secure the long-term health of the fund, which we need to balance with our legal duty to use the funds for the purposes of the Trust. The awards are not made from the capital itself but from investment



ABOVE: Tony Hoang, who recently completed a part-time secondment at the Chinese Mental Health Association

income from the fund. In previous years, if we had unspent income, we used it to increase our investment fund but, increasingly, as application numbers have risen, the income has been used.

In 2009–10 the Trust's income amounted to £219,768 and we committed £286,438 to the awards, based on experience that each year some secondments do not take place, or Partners are not replaced in their branch, which results in the full estimated cost not being used. The trustees use cashflow information at each meeting to ensure award costs can be covered. In 2009–10, we spent £213,020 on awards, and our net current assets increased from £34,273 to £61,015.

A COMPETITIVE SCHEME

Since the scheme was established secondment numbers have risen: 29 awards were made in 2000 and 59 in 2009. The trustees are delighted when we see more applications coming in and increasingly, to meet this demand, we have shortened the requested length of many secondments. However, we recognise that this solution cannot be extended too far or the benefits of each award will be diluted and the aims of the Trust Deed might be compromised.

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 coppicing.

You can see the full list of the 2009 secondments and details of where Partners worked, and for how long, on JLPnet: [JLPNet > Partner Choice > Golden Jubilee Trust > Award Details](#)

Partner Name	Charity Name	Start Date	End Date	Hours
Tony Hoang	Chinese Mental Health Association	1 July 2009	31 July 2009	17.0
...

EXTRA AWARDS FOR 2010

Very happily, the dilemma has been lifted for this year as, to mark our 10th anniversary, the Partnership has gifted the Trust £50,000. This will enable us to give an extra 10 awards this year. We are looking forward to receiving applications for these from Partners in time for our meeting in November. To achieve our target of reaching 500 awards in this milestone year we would like to make at least 33 awards at that meeting.

2009'S AWARD RECIPIENTS

A list of successful Partners and charities can be found on JLPnet and PartnerConnect. The charts illustrate the flexibility of the scheme: there is no 'typical' profile of type of Partner, category of charity, length of secondment or objective.

THE APPLICATIONS

There is also no single route to the matching of Partner to charity: Partners find their own charities (often through first-hand experience of how valuable the charity was to themselves and to the community); discover an opportunity through JLPnet or extend existing branch support for a local charity. There is no built-in eligibility either: Partners do not need to have experience of working with a charity, long service, minimum hours, status etc. The scheme really is open to all.

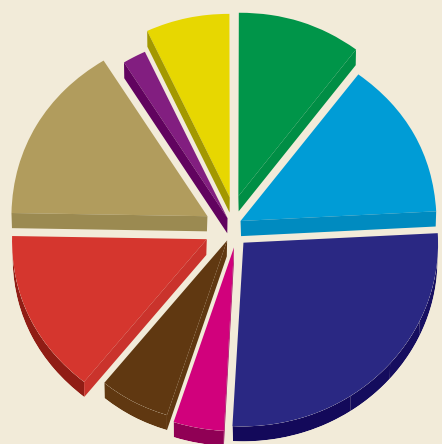
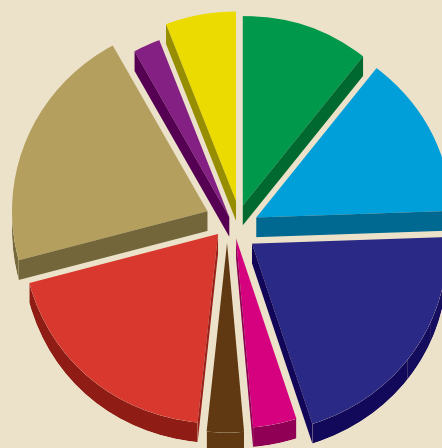
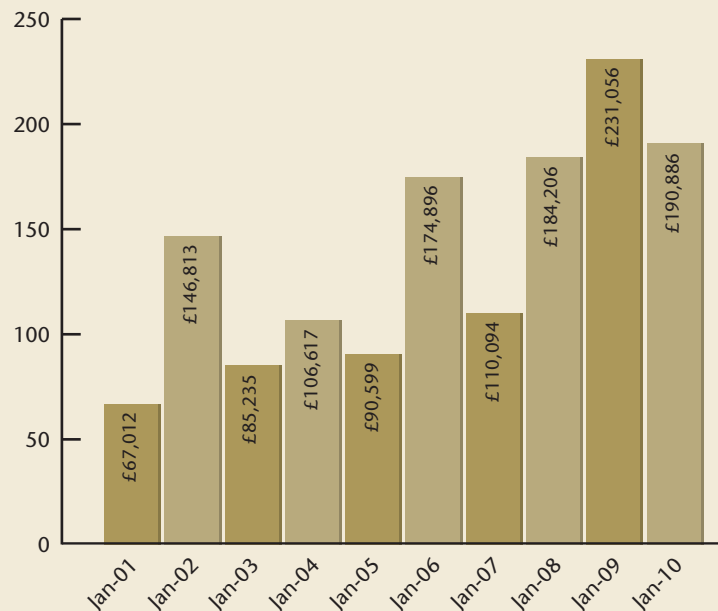
The most successful requests were the ones which enabled the trustees to picture what the Partner would be doing. They showed why the charity's work was important in its field and gave good reasons why the secondment was needed. They demonstrated the Partner's skills and motivation to undertake the work, showed a good level of detail, including a clear breakdown of the time needed, and demonstrated ongoing benefits. In all cases we looked for reassurance that the charity was well regarded in the community, that the work would be valuable and in all respects that the Partner would be able to do what the charity needed in the time available.

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.

WHERE THE MONEY WENT

There has been change over time in the types of charity supported. Applications to undertake environmental work were more popular in the early years; when the Partnership's focus was on supporting youth projects, Trust applications reflected that trend; and more recently community and medical charities have been in top place. However, as the chart illustrates, over a 10-year period the 'top five' categories are relatively evenly balanced. Unfortunately, applications

GOLDEN JUBILEE TRUST IN NUMBERS



☉ for awards to support the other categories have remained consistently low throughout and we should like to see more coming forward, particularly for the elderly, homelessness, and arts. We would also expect and welcome Partners coming to us shortly with suggestions of support for sport or Olympic Games-related charities.

Interestingly, the pattern of awards made last year is very similar to the 10-year picture but, when broken down into the hours the awards represented, the picture changes. Last year, once again, all categories were supported and the number of different branches participating increased; 24 different John Lewis/Corporate branches and 18 from Waitrose/Bracknell.

THE 10TH ANNIVERSARY YEAR

In the 10 years that the scheme has been operating, the trustees have made 441 awards to 436 charities, totalling 181,000 hours. The total spent on these awards was £1.387m.

However, the scheme is about more than just numbers. As we look back on the Trust's achievements there is real pride in how the scheme has become woven into the Partnership's fabric and what the secondments have meant to real people: both the charities, and the Partners themselves, not least in terms of personal growth. Many Partners have sent their stories to the Trust and we would be delighted to hear from more. A selection can be found on the GJT JLPnet/PartnerConnect site.

To mark our milestone we issued certificates to

Partners who successfully completed secondments between the 5th anniversary, when the last certificates were awarded, and the 10th anniversary. We have asked branches to make the awards locally to celebrate Partners' achievements and to alert new Partners to the scheme.

The anniversary, and the extra funds for this year, have given us a natural opportunity to achieve our objective of reaching out to more Partners. We joined forces with an exhibition celebrating the Partnership's 60th anniversary, which we launched at Odney. Sir Stuart Hampson, former Partnership Chairman, presented Trust certificates to Partner representatives from across the business, with some of their charities looking on. The travelling exhibition is available for branches to request.

THE FUTURE

Our continuing objectives remain for all Partners to have an understanding of the scheme and to grow the number of Golden Jubilee Trust secondments in line with the growth of the Partnership. To that end, we would like to see each John Lewis, Distribution, Production and Head Office branch regularly achieve an award, alongside a comparable number from Waitrose. We were happy to see, at the autumn meeting last year, that Waitrose applications had risen and for the first time reached that target. This level of applications from across the business not only helps to show that the scheme is available to all, but keeps it alive in Partners' minds and maintains

participation levels through personal knowledge.

Without additional funding, first-hand knowledge of the scheme will be lower and we believe interest and applications will decline, and this unique scheme will be diminished. We have to find a balance. First we want to promote accessibility: spreading knowledge of the scheme to all Partners so they come knocking on our door. Then we want to maintain a level of competition which is healthy and raises standards within the funds available. Finally, we have to acknowledge the personal disappointment and negative feedback which can arise if a request is refused when it follows encouragement to apply.

We await with interest the outcome of the current review of the Partnership's charitable, community and CSR work to see how our objectives, and our request for the extra funds we believe necessary to secure the Trust's future growth, will fit within any new framework or recommendations.

TRUSTEES

The board of seven trustees who make the awards consist of the Chairman's nominee, Andrew Slater (Chair), three trustee-appointed trustees; Prue Beard, Vivienne Riddoch and Roger Jefcoate; and three council elected trustees. There was heightened interest and competition for the elected posts in January when 17 candidates stood for the three places; Gretha Dignan and Mark Anderson were re-elected and Helen Keppel-Compton was newly successful. ☉

GOLDEN JUBILEE TRUST AWARDS SPRING 2010

NAME AND BRANCH	CHARITY
Patricia Simpson John Lewis Aberdeen	Inspire
Michael Howard John Lewis Brent Cross	Watford and District YMCA
Rachel Shorey John Lewis Brent Cross	Keech Hospice Care
Phillip Goodfellow John Lewis Brent Cross	RSPCA Middlesex North West Branch
Hannah Mitchell John Lewis Cardiff	Lorna Young Foundation
Claire Austin John Lewis Cheadle	Nightstop in Stockport
Grainne Rooney John Lewis Edinburgh	Sistema Scotland
Christine Porter John Lewis High Wycombe	High Wycombe Central Aid Society
Francoise Normand John Lewis Kingston	The Holly Lodge Centre
Jazz Kaur John Lewis Leicester	Ashfield School
Martin Forrest John Lewis Liverpool	Age UK
Lorraine Chandler John Lewis Oxford Street	St Luke's Hospice
Ciara O'Malley John Lewis Solihull	Medical Foundation for the Victims of Torture
Deborah Fletcher John Lewis Trafford	Elisabeth Svendsen Trust for Children & Donkeys
Guy Fairbank John Lewis Victoria	Theatre Royal Haymarket
Nicola Brown John Lewis Victoria	Friends of Brighton and Hove Hospitals
Jane Clifton John Lewis Welwyn	Watford and District YMCA
Dominic Cosco Peter Jones	Vauxhall City Farm
James Page Waitrose Systems	Harlington Hospice Association
Christopher Brock Waitrose Epsom	Riding for the Disabled
Gloria Arranz Bracknell	Kerith Community Church
Gill Bowler Bracknell	Marie Curie Cancer Care
Josey Wales Bracknell	Churches in Reading Drop-In Centre
Lindsay Miles Waitrose Portishead	Tree Aid
Catriona Ottner Waitrose Newbury	Save the Children UK
Sally Knightly Waitrose Gloucester Road	Geffrye Museum Trust Ltd

GOLDEN JUBILEE TRUST - DONATIONS BY DIVISION

		JOHN LEWIS (INC CORPORATE)			WAITROSE (INC BRACKNELL)			PARTNERSHIP TOTAL			10-YR TOTAL
		2007	2008	2009	2007	2008	2009	2007	2008	2009	
TOTAL NUMBER OF PARTNERS SUPPORTED	TOTAL	33	34	37	12	17	22	45	51	59	441
NUMBER OF CHARITIES SUPPORTED	Environmental	6	2	3	2	0	2	8	2	5	47
	Disability	7	4	4	2	0	5	9	4	9	60
	Medical/Care	3	5	9	2	3	3	5	8	12	90
BY TYPE OF ORGANISATION	Elderly	1	1	1	0	0	1	1	1	2	15
	Homeless	0	3	2	0	0	0	0	3	2	14
	Youth	4	7	7	3	5	3	8	12	10	84
	Community	9	8	7	1	7	4	10	15	11	91
	Arts	0	1	1	0	0	1	0	1	2	10
	Animals	2	2	1	1	2	3	3	4	4	25
	TOTAL*	32	33	35	11	17	22	44	50	57	436
NUMBER OF BRANCHES PARTICIPATING		19	21	24	11	12	18	30	33	42	

* Some charities received more than one award



THE GOLDEN JUBILEE TRUST SUPPORTS UK REGISTERED CHARITIES
Registered charity number 1079195

