



*The Golden Jubilee Trust  
Annual Report  
2011-12*



Photograph by Drew Gardner

Each year we update our stakeholders about the Trust's activities. We submitted our formal report for 2011 to the Charity Commission and it's now the turn of Partners to hear how decisions made by the GJT's Trustees benefited both charities and colleagues. The Charity Commission's web site, [johnlewispartnership.co.uk](http://johnlewispartnership.co.uk), PartnerChoice and JLPnet also carry a range of reports, videos and information we have provided about awards, how the scheme works and Partners' secondment experiences.

### Award numbers

We are delighted to record that in 2011 the number of awards made was one of the highest ever. The increased number of applications comes in response to growing recognition of the scheme amongst Partners but it also reflects the interest arising from the current difficult conditions for charities. Fifty-eight charities this time were beneficiaries and the collective contribution of the secondments awarded amounted to 21,064 hours of Partners' time. These Partners exchanged some or all of their Partnership time for a role at their chosen charity and, in so doing, used their talents to enable each charity to achieve objectives that might otherwise have remained out of reach.

### How the awards were made

The charity secondments are decided by the Trustees at selection meetings, two of which were held last year. The number of awards which are able to be made at a meeting depends on the cost of each request – calculated from the length of secondment and the Partner's pay – and the money we have available to meet them.

Once again the money was insufficient to meet all applications so, in order to make the funds go round, we had some difficult decisions to make. Should we make fewer awards and meet the exact application requirements or to try to support more charities by agreeing to the application, but for a reduced amount of time?



We awarded on merit and within that tried to be as balanced in our approach as we could. Of the 58 awards made, 32 were for less time than requested and, within these, all 17 of the applications for full time for six months were reduced; two applications were unsuccessful. In some cases we believed that the shorter period awarded was perfectly appropriate to the task however, in cases where the charity and Partner were a perfect match and they had submitted detailed, fully researched information to support a role which was critical to the charity's success, we would have much preferred to have given the award for the period requested. On the one hand it's rewarding to make as many awards

as we have but we are concerned that by regularly reducing the time we might be diluting the effect of the scheme.

### The Partners

Our decisions are not based on profiles but we are interested in the statistics and Partner's feedback. Pleasingly the age profile of Partners achieved a fairly evenly spread this time and particularly encouraging is the continuing rise in applications from younger Partners. Manager numbers taking part has remained fairly consistent over the years but the rise in non-management Partner applications has reduced the ratio to around 1:4. It is a similar proportion for men too.

	John Lewis (inc Corporate)			Waitrose (inc Bracknell)			Partnership total			12 year Total
	2009	2010	2011	2009	2010	2011	2009	2010	2011	
Number of Partners supported	37	42	44	22	14	6	59	56	58	555
Environmental	3	3	2	2	1	0	5	4	2	53
Disability	4	3	5	5	3	0	9	6	5	71
Medical/Care	9	11	10	3	2	4	12	13	14	117
Elderly	1	2	3	1	1	1	2	3	4	22
Homeless	2	2	3	0	1	0	2	3	3	20
Youth	7	6	7	3	3	0	10	9	9	102
Community	7	5	13	4	2	0	11	7	13	111
Arts	1	3	3	1	1	0	2	4	3	17
Animals	1	3	4	3	0	1	4	3	5	33
Total number of charities supported	35	38	44	22	14	6	57	52	58	548
Number of Branches Participating	24	24	24	18	12	5	42	36	29	

Charlotte Lee on secondment with Arrow Riding Centre



The charts in this report list all awardees and their branches. They also indicate that 24 different John Lewis/Corporate (and there was often more than one application from each of these branches), and five Waitrose/Bracknell locations took part. Disappointingly, the level of Waitrose applications was in contrast to the trend of increased interest from other areas of the business and we are concerned that, if Waitrose Partners do not see awards to their division, they may come to believe it's not available to them which then leads to a further downward spiral. However, early signs this year are that the rate is recovering and we are hopeful that the new Waitrose volunteering initiatives are encouraging a climate of community engagement. The Trustees are keen, nevertheless, to get across the message that Partners are replaced during a secondment as Partners are keenly aware on the effect of their absence on the team.

The charts illustrate there is no 'typical' profile or type of Partner, length of secondment or objective. 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 is truly flexible. The Trustees continue to be amazed by Partners' desire and ability to make a difference, sometimes under difficult circumstances.

## The Charities

Our foremost duty as Trustees is to deliver support to charities, rather than to put the Partner's or the branch's needs first, but we do need to know from the charity that any secondment will fully utilise the Partner awarded to them. We look for reassurance that the charity is sound, that the work requested is really needed – rather than just 'another pair of hands' – and that it will deliver much needed, preferably long-term, results. The charts illustrate the successful charities shown by number, type and the hours the awards represented. Although our decisions were on merit and not made to achieve a pre-determined balance, we were very pleased to see the awards

covered all charity categories. Medical/care, youth and community groups once again applied for and received the greatest proportion of support. We would like to see more requests from the traditionally less popular categories such as arts and homelessness, and to see an uptake in environmental work.

## The best applications

The best applications always stand out. Those which were successful were where Partners convinced us of their strong motivation, gave good detail including a breakdown of the skills and time needed, indicated the long lasting value the secondment would add for the charity and, as an indication of having thought it through to the end, the benefits for

themselves too. We were reassured of the successful Partners' ability to fulfil an important role for the charity in the time available, and so deliver the most effective help where it was most needed and where the result would be the most long-lasting.

## How awards are funded

The Partnership Council (then called Central Council), agreed that £5 million should be set aside to establish the Trust in 2000 in celebration of the Partnership's Golden Jubilee. The intention was that it should be a long-lived scheme therefore the Trustees have to secure the ongoing health of the fund, however, we also have to balance that with our legal duty to use the funds for the purposes of the Trust. Awards are, therefore, generally made from the fund's investment income rather than from the capital itself.

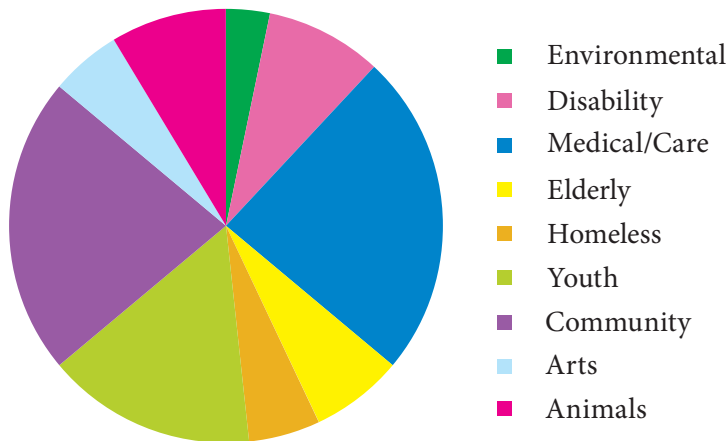
In 2011/12 the Trust's income amounted to £202,787 and we committed £240,198 to the awards. This figure was based on our experience that occasionally secondments do not take place, and each year some Partners are not replaced in their branch, which results in the full estimated cost not being used. The Trustees use cash flow information at each meeting to guide them in their decision making. The actual cost of awards amounted to £210,474.

Our total funds moved from £5.663m to £5.37m. Throughout its history the total fund has moved in both directions but, because of the method of investment chosen, it had delivered consistent levels of income to fund the awards. However, changes to investment income and a decision to review future needs led us to seek professional guidance and we held an additional meeting in January with an adviser for that purpose. The information-gathering is ongoing and we are looking at the most effective way to implement the advice received.

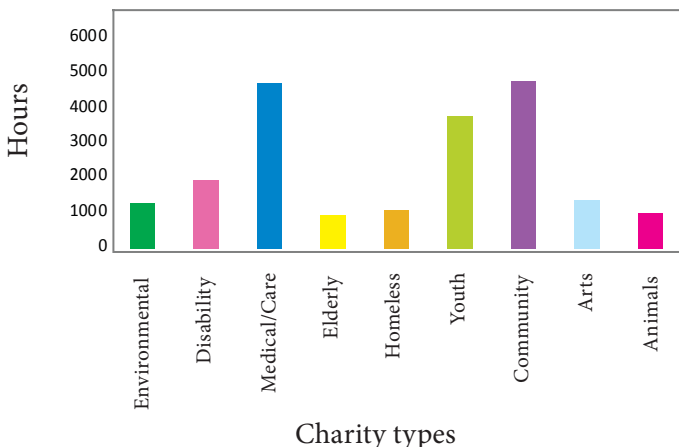
## Supporting charities

Charities are finding it tough at the moment; they are fighting for funding and are increasingly

Percentage of secondments awarded by type



Hours awarded to each type of charity





looking to us for support. They hear about the GJT from many sources, some of those we can influence include information from the charity press, talks, previous GJT secondments, branch community work and the Partnership's external website. We are very happy to further conversations about help the charity requires and, in many cases, the discussions translate into job descriptions which are advertised on JLPnet for Partners to view. We then pass on contact details to interested Partners. But this isn't the only route, most Partners apply for secondments to charities known to them, either personally or via a branch link. Whatever the route to GJT applications, we are pleased when we can award secondments which deliver much needed targeted support.

### The future

Our wish over the years has been, and still remains, to reach all

Partners so they know that the scheme is for everyone. Happily then, both applications and interest in the scheme are currently at an all-time high and, given the take up across the Partnership from areas such as 'JL at home' branches, Partnership Services, distribution, and, geographically for Waitrose, ranging from the north of England to Wales, we know that knowledge is spreading. However, although we are delighted to see such success, and aware that increased competition can have a positive impact on raising standards, we are also concerned that too many unsuccessful applications could be discouraging.

We want to continue to promote the scheme to all Partners so they come knocking on our door whilst acknowledging the personal disappointment and negative feedback which can arise if a request is refused when it follows encouragement to apply.

If awards are unable to keep up with branch growth, then we fear that applications will decline, and the scheme will be diminished. We would like to see annual awards to each Partnership Services, John Lewis, Distribution, Production and Head Office location, alongside a comparable number from Waitrose. However, without additional funding, we see that objective is less realistic.

We reported last time that we awaited the outcome of the review of the Partnership's charitable, community and CSR work to inform any request for additional funds for the GJT. We are sorry that recommendations have not been forthcoming. However, we remain committed to securing the Trust's future growth and once the investment review confirms our overall capacity for making awards, we will consider how best to secure the extra funds we believe necessary.

### Trustees

The board of seven Trustees who make the awards consist of the Chairman's nominee; Andrew Slater (Chair) until January 2012, succeeded by Tracey Killen, three trustee-appointed trustees; Prue Beard, Vivienne Riddoch and Roger Jefcoate. The three council elected trustees; Gretha Dignan, Mark Anderson and Helen Keppel-Compton serve until September 2012 when elections for new council-elected trustees take place. At its special meeting in January 2012, the Trustees updated their Trust Deed to align the GJT's Trustee term of office to the Partnership Council's new period of three years.

I have only recently been appointed as a Trustee and, at the last meeting, I was delighted to be elected as the Trustees' new Chairman. Andrew Slater chaired the group so ably over the last six years and I should like to thank him for his commitment, thoughtful leadership and the enormous contribution he made in furthering the Trust's objectives. The Trustees know this scheme offers a huge pool of talent to charities to drive forward their ambitions and that it delivers enormous benefits and development opportunities to the Partners taking part. In my new role, I look forward to working with the Trustees to build on the scheme's success in the future.

*Tracey Killen, Chairman of the Trustees*





Spring 2011

Name	Branch	Charity
Mike Hird	John Lewis Bessemer Road SB	St John Ambulance
Rukia Bari	John Lewis Cardiff	Mentoring for All
Kathryn Tudor	John Lewis Cardiff	Novas Scarman Group
Jonathan Scott-Wilson	John Lewis Cardiff	Friends of Pedal Power Project
Si Woolston	John Lewis Cardiff	Royal Society for the Protection of Birds
Georgie Swann	John Lewis Cheadle	Key 103 - Cash for Kids
Sue Rice	John Lewis Cheadle	Genesis Breast Cancer Prevention Appeal
Jessica Madge	John Lewis Cribbs Causeway	Royal West of England Academy
Richard Humphrey	John Lewis Cribbs Causeway	Wheels Project
Rebekkah Matthews	John Lewis Cribbs Causeway	Filton Community Church
Ian Traverse	John Lewis Cribbs Causeway	MS Society
Jackie Mcfaull	John Lewis Glasgow	Cat's Protection League
Gillian Hudson	John Lewis High Wycombe	Hearing Dogs for Deaf People
Lesley Poulton	John Lewis High Wycombe	Iain Rennie Hospice
Jean Georgiou	John Lewis Kingston	Age Concern
Antoinette Gonsalvez	John Lewis Kingston	Hestia Housing and Support
Joanna Boddington	John Lewis Liverpool	The National Trust
Shane Chase	John Lewis Norwich	Eaton Vale Scout and Guide Activity Centre
Laura Mcdermott	John Lewis Nottingham	Alzheimer's Society
Jill Brayshaw	John Lewis Sheffield	The Cathedral Archer Project Ltd
Nicola Storey	John Lewis Sheffield	Safe@last

# Awards



From left to right: Nicola Storey on a segment with SAFE@LAST, Gilly Hudson with Hearing Dogs for the Deaf, Scott Pendrous with Diversity Role Models and Alice Beaman with Katherine House Hos-

Autumn 2011

Charlotte Lee	John Lewis Bluewater	Arrow Riding Centre for Disabled
Ian Downey	John Lewis Brent Cross	Child Bereavement Charity
Stephen Bartell	John Lewis Brent Cross	Safety Centre (Hazard Alley) Ltd
Jacqueline Payne	John Lewis Brent Cross	Royal Society for the Prevention of Cruelty to Animals
Michelle Tooke	John Lewis Cambridge	FLACK Cambridge
Rebecca Slater	John Lewis Cheadle	Stockport, East Cheshire and High Peak Cerebral Palsy Society
Clair Falconer	John Lewis Glasgow	Board Of Management of John Wheatley College
Lorna Anne Macaskill	John Lewis Glasgow	Scottish Spina Bifida Association
Sarah Goldstone	John Lewis High Wycombe	Families of Children United Support (FOCUS)
Lee Milligan	John Lewis Leicester	Burton Albion Community Trust
Lauren Bennett	John Lewis Liverpool	Claire House
Cecilia Kinnear	John Lewis Liverpool	Liverpool Biennial of Contemporary Art Limited
Emily Howells	John Lewis Liverpool	Liverpool Lighthouse Limited
Charly Twigg	John Lewis Magna Park	Safety Centre (Hazard Alley) Ltd
Linda Marshall	John Lewis Newcastle	Age Concern Gateshead Limited
Amanda Lockwood	John Lewis Norwich	The Benjamin Foundation
Gemma Taylor	John Lewis Oxford Street	Get Connected Helpline
Jo Vickery	John Lewis Poole	IEat
Chris Maybury	John Lewis Poole	The People's Dispensary for Sick Animals
Debbie Bennett	John Lewis Sheffield	Autism Plus Limited
Angela Colson	John Lewis Solihull	Marie Curie Cancer Care
Julie Sneddon	John Lewis Southampton	Headway Portsmouth and South East Hampshire
Sameer Malik	John Lewis Victoria	London Community Cricket Association (Cricket for Change)
Scott Pendrous	John Lewis Victoria	Diversity Role Models
Melvyn Brant	Corporate Victoria	Age Concern Reading
Paul Stoney	Corporate Victoria	The Salisbury Arts Theatre Limited
Dwayne Mulcahy	Bracknell	The British Red Cross Society
Tracey Harrison	Waitrose Christchurch 754	Macmillan Caring Locally
Belinda Marston	Bracknell	Woodley Age Concern
Alice Beaman	Waitrose Newport 687	Katharine House Hospice



**The John Lewis Partnership Golden Jubilee Trust**

**Registered Charity Number: 1079195**