



# The Golden Jubilee Trust Annual Report 2012-13





Each year we update our stakeholders about the Trust's activities and our formal report has been submitted to the Charity Commission. This is the account for Partners to hear how last year's GJT Trustee decisions benefited both charities and colleagues. The Partner intranet, [johnlewispartnership.co.uk](http://johnlewispartnership.co.uk) and the Charity Commission's web sites all carry a range of information about the GJT; reports, videos and facts that we have provided about awards, how the scheme works and Partners' secondment experiences.

### Award numbers

There is a growing recognition of the scheme amongst Partners which led to a very busy year and a record number of applications. It reflects, too, the increasing need for charities to seek alternative means of help as they face current reductions in funding and facilities. We were therefore delighted to be able to help 55 charities through GJT awards; a collective contribution of 17,494 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. How do we make the decisions? We don't set a quota on charity categories but award on merit and within that try to be as balanced in our approach as we can. Once again the money was insufficient to cover all applications so we asked ourselves whether we should aim to meet the exact application requirements or to try to support more charities by agreeing to the application, but for a reduced amount of time? On the one hand it's

rewarding to make a higher number of awards but we are concerned that by regularly reducing the time we might be diluting the effect of the scheme.

There were 65 applications from which we refused ten and, of the 55 who were successful, 27 were awarded for less time than requested. In some cases we believed that the shorter period awarded was appropriate to the task. However, in cases where the charity and Partner were a perfect match; and had submitted detailed fully researched information for a role which was critical to the charity's success, we would have much preferred to have given the award for the period requested.

### The Partners

Our decisions are not based on profiles but we are interested in the statistics and Partners' feedback. Pleasingly the age profile of Partners achieved a fairly evenly spread and although Manager numbers taking part have remained fairly consistent over the years, the rise in non-management Partner applications once again shows a ratio of 1:4. It is a similar ratio of men to women too. The charts in this report list all awardees and their branches. They also indicate that 29 different John Lewis/Corporate and ten Waitrose/ Bracknell locations took part (there was often more than one application from each of these branches). We were pleased to see that Waitrose applications had returned to a higher level but would like to see even more interest so the proportion of applications became more representative of the size of the division. The Trustees are keen 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 experience of working with a charity, long service, minimum hours, status etc; the scheme is truly flexible. The Trustees continue to be amazed



Christina Underhill on secondment with the National Trust

	John Lewis (inc Corporate)			Waitrose (inc Bracknell)			Partnership total			13 year Total
	2010	2011	2012	2010	2011	2012	2010	2011	2012	
Number of Partners supported	42	52	42	14	6	13	56	58	55	610
Environmental	3	2	3	1	0	1	4	2	4	57
Disability	3	5	2	3	0	2	6	5	4	75
Medical/Care	14	10	15	2	4	3	13	14	18	138
Elderly	2	3	0	1	1	0	3	4	0	22
Homeless	2	3	3	1	0	0	3	3	3	23
Youth	5	7	8	3	0	0	9	9	8	109
Community	5	13	5	2	0	5	7	13	10	121
Arts	3	3	4	1	0	1	4	3	5	22
Animals	3	4	2	0	1	1	3	5	3	36
Total number of charities supported	40	50	41	14	6	13	52	58	55	603
Number of Branches Participating	24	24	29	12	5	10	36	29	39	



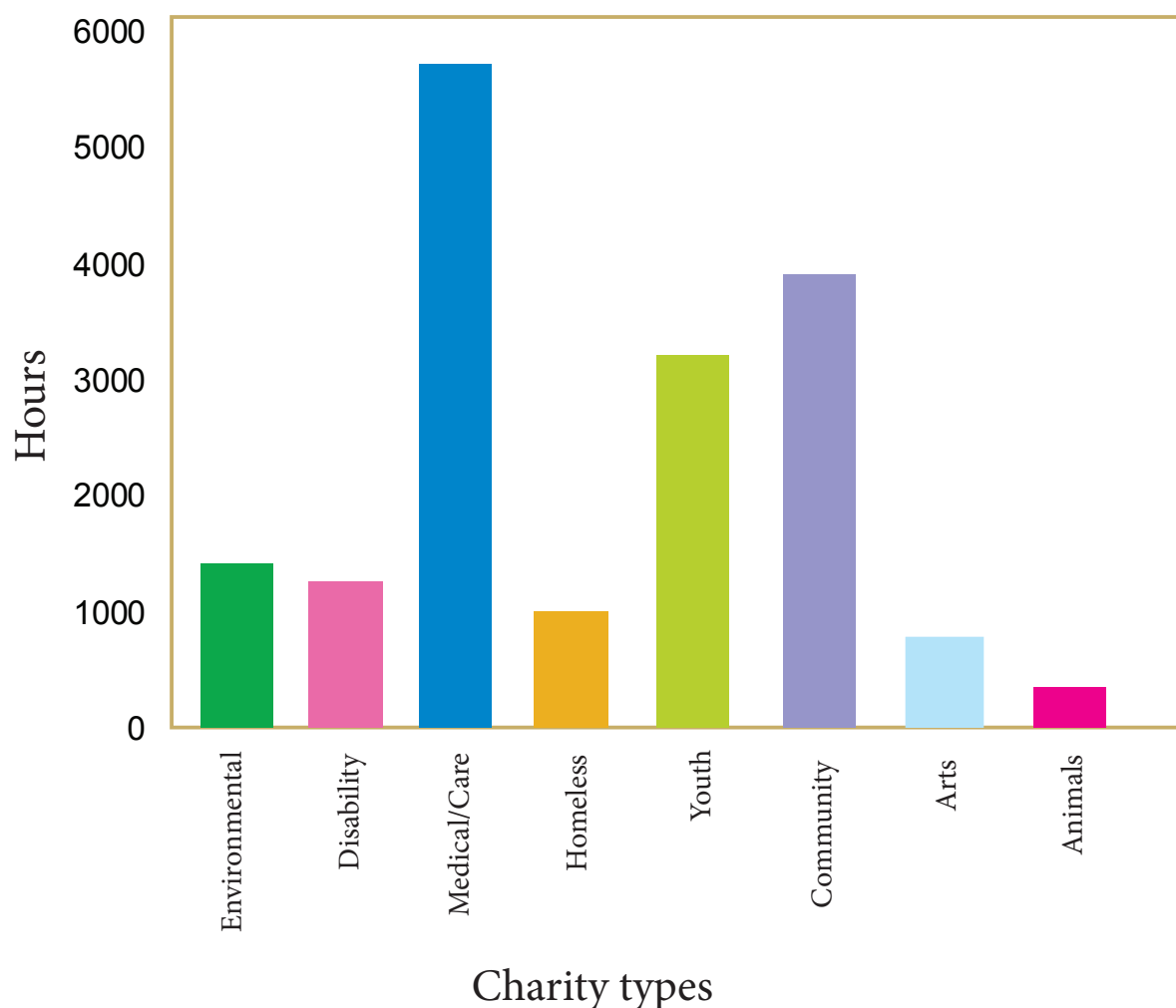
Christine Clarke on secondment with Action on Addiction

by Partners' reasons for putting themselves forward, sometimes for very personal and moving reasons; their ability to stretch themselves in order to succeed and, during their secondments, frequently going above and beyond as it becomes clear that they really are making a difference.

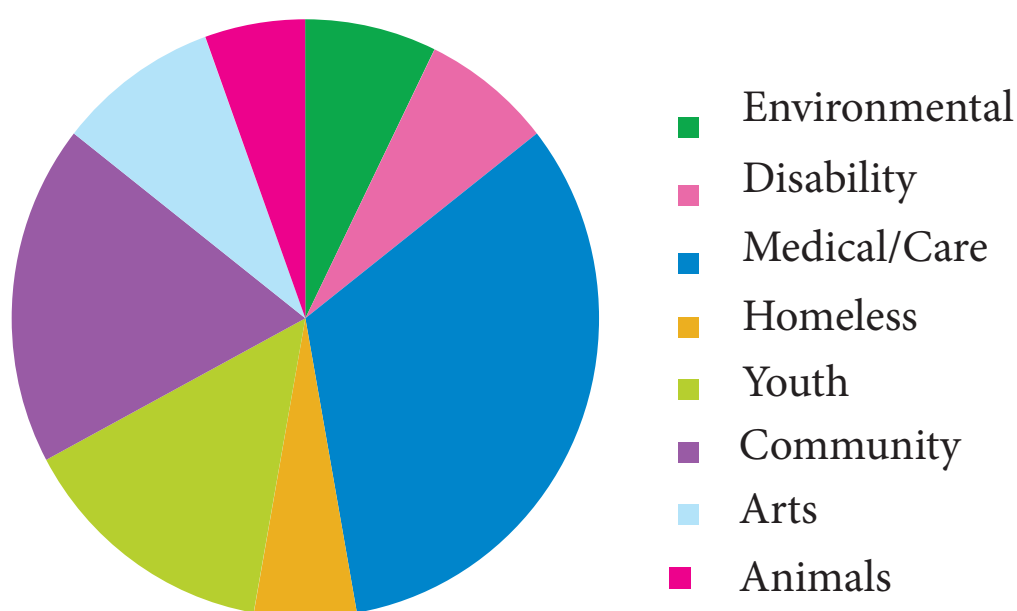
### The Charities

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. Medical/care, youth and community groups once again applied for and received the greatest proportion of support and we were pleased to see an uptake in arts-related causes and, to a lesser degree, to environmental charities. Although our decisions are →

### Hours awarded to each type of charity



### Percentage of secondments awarded by type



made on merit and not to achieve a pre-determined balance, we would nevertheless like to see more requests in support of homelessness, disability and elderly people. However, we do recognise that help for these groups is not as limited as the statistics might indicate as it is often provided by charities categorised under their prime purpose, such as Chest, Heart and Stroke Scotland, The Chicken Shed Theatre Trust, Alzheimer’s Society and hospices.

### The best applications

The best applications always stand out and those which were successful were where Partners had done their homework. They 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. They would deliver 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 2012/13 the Trust changed its accounting year from 31 January to 31 March. The income for the 14 months amounted to £208,488 and we committed £231,759 to the awards. This figure was based on our experience that occasionally secondments do not take place, and each year some Partners are



Barry Conroy on secondment with Alzheimer Scotland



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 £173,256.

Our total funds moved from £5.379m to £6.209m. Throughout its history the total fund has moved in both directions but, because of the method of investment chosen, it 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 agreed to move investments to adopt a more secure policy.

#### Supporting charities

Charities are finding it tough at the moment; they are fighting for funding and are increasingly 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 for Partners to view on the Partner intranet. 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, both applications and interest in the scheme are

currently at an all-time high which the trustees judge to be a good time to take a look at what's best about the scheme; to think about what more could be done to meet increased competition and make the scheme truly accessible for all in the future.

#### Trustees

The board of seven Trustees who make the awards consist of the Chairman's nominee; Tracey Killen (chair), three trustee-appointed trustees; Prue Beard, Vivienne Riddoch and Roger Jefcoate CBE. The three council elected trustees; Mark Anderson (deputy chair), Liz Hogan and John Hagues were elected in Autumn 2012.



Tracey Killen, Chairman of the Trustees

In my first year as Chair I have enjoyed discovering just what the scheme delivers. I have observed charities being able to drive forward their ambitions through Partners' talents and can see the benefits and development opportunities offered to the Partners taking part. I'm very much looking forward to working with the Trustees to build on the scheme's success in the future.



# Spring 2012

Name	Branch	Charity
Jeni Malins	John Lewis Granby	Willen Hospice
Vicky Walmsley	Herbert Parkinson	Creative Support, Blackburn
Susan Anne Wilkinson	John Lewis Aberdeen	Chest Heart & Stroke Scotland
Jackie Piper	John Lewis Bluewater	Cerebral Palsy Care Kent
Lisa Ricketts	John Lewis Brent Cross	The Peace Hospice
Anne Marie Collins	John Lewis Cardiff	Cardiff Museum Development Trust
Jillian Gibbons	John Lewis Cheadle	David Lewis
Marion L Kerr	John Lewis Edinburgh	Scottish Seabird Centre
Debbie Spiers	John Lewis Glasgow	Prince & Princess of Wales Hospice Glasgow
Barry Conroy	John Lewis Hamilton	Alzheimer Scotland
Hannah Judge	John Lewis High Wycombe	The Federation of London Youth Clubs
Louise Case	John Lewis Magna Park	Ride High Limited
Richard Lister	John Lewis Newcastle	The Cyrenains
Cheryl Burrows-Flowers	John Lewis Nottingham	RSPCA Radclife Animal Trust
Oxana Mulligan	John Lewis Oxford Street	Friends of Michael Sobell House
Lucy Heywood	John Lewis Oxford Street	The Little Angel Theatre
Samantha Ring	John Lewis Peterborough	Family Voice Peterborough
Lee Morley	John Lewis Peterborough	Oundle Music Trust
Elle Bradley-Cox	John Lewis Sheffield	Worthwhile Occupational Recreation Krafts Ltd
Samantha Harling	John Lewis Southampton	The Second Chance Society
Carole Youdan	John Lewis Tunbridge Wells	West Kent YMCA
Sharon Gower	John Lewis Watford	Herts Young Homeless Young Homeless
Gina Broderick	John Lewis Watford	Herts Young Homeless Young Homeless
Gemma Lacey	Corporate Victoria	Hampshire and IOW Wildlife Trust
Trisha Mayers	Bracknell	Crossroads Care Hertfordshire North
Jessica Linsley	Havant 171	Home-Start Havant
Charlie Rivers	Bracknell 251	Ostomy Lifestyle
Mike Brown	Altrincham 494	NOISE Festival Ltd
Alison Hall	Petersfield 209	Hounds for Heroes
Larissa Saxby-Bridger	Norwich 222	National Society for Epilepsy
Sian Cooke	Cardiff (Waitrose) 501	Freedom Church
Rachel Grant-Waters	Foodhall 001 456	St John's Hospice
Jo Adkins	Bracknell 251	The Animal Rescue Charity



From left to right: Dominic de Bruxelles on secondment with Chicken Shed, Paula Prince with Milton Keynes Money Lifeline, Will Robbins with the Wessex Cancer Trust and Jessica Linsley with Home Start Havant.

Autumn 2012

Name	Branch	Charity
Victoria Jones	John Lewis Cardiff	Llamau
Christina Underhill	John Lewis Cheadle	National Trust
Hilary St John Smith	John Lewis High Wycombe	DrugFAM
Christine Clark	John Lewis Liverpool	Action on Addiction (The Brink)
Jacqueline Wild	John Lewis Liverpool	Claire House
Paula Prince	John Lewis Magna Park	MK Money Lifeline
Janet Green	John Lewis Poole	Julia's House
Beverley Braddon	John Lewis Sheffield	Friends of Sheffield Manor Lodge
Helen Colclough	John Lewis Sheffield	Rotherham Hospice
Joseph White	John Lewis Solihull	Cure Leukaemia
William Robbins	John Lewis Southampton	Wessex Cancer Trust
Simon Herbert	John Lewis Victoria	The Voices Foundation
Lynette Sharp	John Lewis Welwyn	Noah's Ark Children's Hospice
Dominic De Bruxelles	Peter Jones	Chicken Shed
Duska Bosnjak	Peter Jones	The Pepper Pot Centre
David Ragg	John Lewis Stanley Green SB	The Mustard Tree
Andrew Milton	John Lewis West Quay SB	U Support
Joyce Meader	Waitrose Chandlers Ford 668	SSAFA Forces Help
Catherine Scoones	Waitrose Canary Wharf 664	RSPB
Jennifer Southern	Waitrose Thatcham 659	Alzheimer's Society
Stuart Bassham	Bracknell	Youth and Families Matter
David Collis	Bracknell	Quaker Social Action



**The John Lewis Partnership Golden Jubilee Trust**

**Registered Charity Number: 1079195**

**Front page photographs L-R: Simon Herbert on secondment with  
Voices Foundation, Barry Conroy with Alzheimer Scotland and  
Charlie Rivers with Ostomy Lifestyle.**

**Secondees have been photographed by Drew Gardner, Mark Waugh,  
Jeff Hopkins and Mike Ford**