

Golden Jubilee Trust

(Registered charity number 1079195)

Annual Report 2013/14



Introduction

Each year we update our stakeholders about the Trust's activities and our formal report is 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 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.

Awards

Award numbers

There is a growing recognition of the scheme amongst Partners which led to a very busy year and a significant 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 45 charities through GJT awards; providing a collective contribution of 17256 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 skills match of the Partner to the project, the long term sustainability of the work to be undertaken, the cost of each request

calculated from the length of secondment and the Partner's pay - and the money that is 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. The funds were insufficient to cover all applications so the challenge we face is: should we aim to meet the exact application requirements, or can we try to support more charities by agreeing to the application, but reducing the amount of time awarded? It is a fine balance and one the Trustee has spent a lot of it's time trying to achieve.

There were 52 applications from which were put forward 47 were successful, nine were awarded for less time than requested and five were refused. In some cases we believed that the shorter period awarded was appropriate to the task. In cases where the charity and Partner were clearly aligned; and had submitted detailed fully researched information for a role which was critical to the charity's success, we have given the award for the period requested.

Partners

Our decisions are not made to target specific Partner or charity profiles but we are interested in the statistics and Partners' feedback. Pleasingly the age profile of Partners achieved a fairly even spread. The number of managers taking part has shifted slightly this year, reflecting a rise in non-management Partner applications from a ratio 1:4 to 1:5. The ratio of men to women receiving awards is around 1:3.

The charts in this report list all awardees and their branches. They also indicate that 24 different John Lewis/Group and two Waitrose/Bracknell locations that took part this year (as in previous years there was often more than one application from each of these branches). We would particularly like to see more applications submitted by Waitrose Partners so that the proportion of applications becomes more representative of the size of the division. The Trustees are keen to get across the message that the job role of the secondee is covered during their secondment, as Partners are keenly aware on the effect of their absence on the team.

The statistics illustrate that 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 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 the original result as it becomes clear that they are making a difference.

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, 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. This isn't the only way to access a potential GJT secondment; many Partners apply for awards with 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.

	John Lewis (inc Group)			Waitrose (inc Bracknell)			Partnership total			14 year Total
	2011	2012	2013	2011	2012	2013	2011	2012	2013	
Number of Partners supported	52	42	45	6	13	2	58	55	47	657
Environmental	2	3*	0	0	1	0	2	4	0	57
Disability	5	2	4	0	2	0	5	4	4	79
Medical/Care	10	15	16	4	3	1	14	18	17	155
Elderly	3	0	2	1	0	0	4	0	2	24
Homeless	3	3	3	0	0	0	3	3	3	26
Youth	7	8	11	0	0	1	9	8	12	121
Community	13	5	5	0	5	0	13	10	5	126
Arts	3	4	2	0	1	0	3	5	2	24
Animals	4	2	2	1	1	0	5	3	2	38
Total number of charities supported	50	41	43	6	13	2	58	55	45	648
Number of Branches Participating	24	29	22	5	10	2	29	39	24	

The Charities

2013-14

Type of Charity	By number awarded	By hours invested
Environment	0	0
Disability	4	1717
Medical/Care	17	6452
Elderly	2	585
Homeless	3	1751
Youth	12	3891
Community	5	1503
Arts	2	849
Animals	2	508
Total	47	17256

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. Charities with a focus on providing medical care across society and groups working with young people applied for and received the greatest proportion of support; we were pleased to see a small but continuing interest in promoting and developing arts-related causes but noted that environmental charities did not seek or receive support this year. Although our decisions are 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. This year the GJT made awards to Macmillan Cancer Care and Support, Roy Castle Lung Cancer Foundation and Finsbury and Clerkenwell Volunteers; each of these charities provides services to a wider variety of users than their prime purpose suggests.

Applications

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.

The income for the 12 months amounted to £206,243 and we committed £235,492 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 £176,915.

Our total funds moved from £6.209m to £5.876m. During the year a decision to review the Trust's investment strategy led us to seek professional guidance and we agreed to move investments to adopt a more secure policy. During 2013 the GJT implemented a new investment strategy, moving assets to two separate diversified growth funds. This adjustment ensures that the management of GJT investments is in line with the Financial Standards Authority regulatory framework and should continue to deliver secure returns in the future.

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 continues to be high. Trustees believe that consequently this is 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 to make the scheme truly accessible for all Partners in the future. The newly appointed Head of Community and Partnership Trusts, Judith Cave, will also work with the GJT trustees to further develop our flagship volunteering scheme.

Trustees

The board is made up of seven Trustees:

The Chairman's nominee:

Tracey Killen (chair)

Three trustee-appointed trustees:

Vivienne Riddoch

Roger Jefcoate CBE DL

*** Prue Beard**

Three Partnership Council elected trustees:

Mark Anderson (deputy chair)

****Liz Hogan**

John Hagues

Elected in autumn 2012

*Prue resigned from her position as trustee during July 2013 having been a trustee from the outset of the GJT, there is consequently a vacancy for a trustee-appointed trustee.

**Liz covered the role of Golden Jubilee Trust Manager on a temporary basis, from August 2013, following Chris Jones retirement from the post – during this time Liz did not take part in trustee decisions regarding awards.

Message from the chair of trustees

This year, as Chair, I have seen the continuing development of the GJT - the board of trustees has experienced several changes, and the management of the trust has altered for the first time since the scheme's inception. A new role, Head of Community and Partnership Trusts, has been created to look at all Partnership community activity. This will give us an opportunity to discuss the role of the GJT in the Partnership's extensive range of community investment and how it fits with the wider CSR agenda. I am very keen to see the trust adapting and growing to meet the changing needs of Partners and the communities in which we operate. Enabling charities to drive forward their ambitions through Partners' talents continues to provide multiple benefits and development opportunities for the Partners taking part. I'm very much looking forward to working with the Trustees and the Head of Community and Partnership Trusts to build on the scheme's success in the future.

Tracey Killen, Chair of the Trustees

