



ANNUAL REVIEW 2015 - 2016



The Golden Jubilee Trust
3rd Floor Partnership House,
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John Lewis Partnership

What is the Golden Jubilee Trust?

A John Lewis Partnership charitable trust whose object is to give UK registered charities the opportunity to benefit from the skills of its workforce.

Registered charity in
England & Wales
Charity Number
1079195



Annual Review 2015-16

Sharing all the great work that the Golden Jubilee Trust has enabled is something that I look forward to every year. Secondments are continuing to support the wellbeing of our local communities in a meaningful way whilst enabling Partners to develop themselves in totally new environments. At this year's celebration event recent secondees met the Trustees and the Chairman of the Partnership and as ever, it was a privilege to hear their stories. One secondee shared something that I heard said in a variety of ways when he confided his six months had changed his life and he was a different and happier person as a result; the opportunity of the GJT is a remarkable gift.

Partners and charities tell us that secondments make a real difference. This year we have started to measure the value and impact of secondments.

Welcoming two new external Trustees has also added a new dimension to our board. Yetunde Hofmann and Sarah Vallins both bring significant knowledge of the charity sector and community needs to the decision making process.

I hope that you enjoy finding out about what the GJT has been up to this year. Maybe this is the year that you decide that a secondment might work for you or a charity that you know?

Tracey Killen,
Chair of Trustees

Photography by: James Mackenzie, Mark Freeman, Derek Pelling, Emma Cole, Steve Cox, Nick Brimmer, Carmel Garner, Lynda Hartley

THE MONEY

The scheme was established in 2000 when the Partnership Council agreed that £5 million should be set aside to establish the trust 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 2015 the Trust's income amounted to £153,762 and we committed £277,279 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 £212,868.

Our total funds moved from £6.329 million to £5.888 million - a 7% decrease over last year. Throughout its history the value of the fund has moved in both directions but, because of the methods of investment chosen, it has delivered consistent levels of income to fund the awards. Trustees are currently reviewing the investment strategy to ensure they are achieving the best possible income for the future.

GOLDEN JUBILEE TRUST

ANNUAL REVIEW 2015 / 16 IN NUMBERS

Partners that participated had between... **1-30** years service with the Partnership

100% of Partners and charities surveyed would recommend the programme

50 Awards were made, which is equivalent to... **19,243** hours of volunteering

Trustees agreed secondments with a total cost of... **£277,279**

Partners aged between... **23-62** received awards

The ratio of women to men undertaking secondments this year was... **4:1** **33** different branches participated

2 new external trustees were appointed by resolution of the trustees **3:1** The ratio of non-management to management Partners was...

WHAT IS FUNDED?

Trustees met twice during 2015 to make awards. The number of awards made at a meeting is dependant on the cost of each request - calculated from the length of secondment, Partners pay - and the money available to meet them.

We aim to achieve a balance between making fewer awards, in order meet the exact application requirements, or supporting more charities by agreeing to the application, but for a reduced amount of time maximising the benefit of available funds. Each application was considered and awards made on merit with a focus on secondments which demonstrated a strong skills match between the Partner and the project and either a lasting legacy for the charity or the project would help the charity to achieve goals which otherwise would be out of their immediate reach.

In some cases we believed that the shorter period awarded was perfectly appropriate to the task, however, in some 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.

Of the 50 awards made 17 were for less time than requested, while two of the applications which requested full time six month secondments were made in full; 14 applications were unsuccessful. Where an award is not made Partners and their charities are sometimes invited to submit an amended application to the next award meeting.



Tony Sim, Head Chef, John Lewis Liverpool on secondment with Stroke Association

CREATING LASTING IMPACTS

We're for

CHARITY: **Stroke Association**
SECONDEE: **Tony Sim**

Tony chose the Stroke Association after a family member experienced a stroke. His secondment role as a Life After Stroke Coordinator helped him to gain a greater understanding of what a stroke is, how it affects people's lives and he focused on improving outcomes and quality of life for people who have been impacted by stroke in the local community.

When Tony returned to work, he wanted to carry on supporting the charity. He brought Make May Purple, the Stroke Association's awareness month, to his branch and a number of other Partners got involved too, helping to raise money and awareness for the charity: the Haberdashery team

Stroke
association

crocheted over one hundred purple flower pins to sell during lunchtime.

Kate Charles from the Stroke Association visited the Liverpool branch to take Partner's blood pressure readings and to highlight the connection between high blood pressure and stroke:

“ It was great to see so many staff getting their blood pressure checked during the event; it's a simple way to reducing your risk of having a stroke. We took the blood pressure of seventy five Partners on the day with twenty one being referred to primary care for a follow up check. ”

SHARING SKILLS



CHARITY: **Chilterns Multiple Sclerosis Centre**
SECONDEE: **Joanna Milton**

The primary focus of the secondment was improving the centre's marketing and communications approach following the charity's move to a new building and the need to access new potential funders.

“ When I first spoke to the John Lewis branch about the possibility of a secondment, I could not have anticipated the difference a single person could make to our charity, and the hole she would leave behind. In short, Jo has been a huge asset to our charity. Jo's work ethic, dedication to the cause and fun personality helped her fit seamlessly into our team. Thank you very much for enabling Jo to work with Chilterns MS Centre these six months. ”

Hannah Asquith,
Head of Fundraising,
Chilterns MS Centre

100% of Partner respondents said that the biggest impact on their skills immediately after the secondment was their increased ability to adapt to challenging and new situations



CHARITY: **Sue Ryder, Nettlebed Hospice**
SECONDEE: **Liz Baker (and Sasha the dog)**

Liz went on secondment to Nettlebed Hospice in Oxfordshire, she is also a Pets As Therapy volunteer. Her GJT award allowed her to combine her support for both charities. “It's such a unique opportunity and if it wasn't for the GJT I wouldn't be able to volunteer in this way so I'm incredibly grateful,” she says. “To have Sasha with me on my placement is such a bonus as she brings a new energy to the hospice – she really brightens the day for patients. She's doing a brilliant job and she seems aware of patients' circumstances,” Liz says.

“ Generally, we live selfish lives and the best thing about my secondment has been the feeling that Sasha and I have been able to add a bit of joy to others' lives, helping them to forget their woes even if just for a little while. ”

Liz Baker, Partner,
John Lewis, High Wycombe

CHARITY: **Aylesbury Youth Motor Project**
SECONDEE: **Richard Webb**

This secondment Richard to share his skills and passion for motor mechanics with a group of young people who access the project.



“ Through the GJT, I've helped grow the students' knowledge base and in turn have increased my own coaching skills and satisfaction. I've taken a lot out of the GJT, a real self-worth, by being able to help out. ”

Richard Webb, Partner,
Park Royal Warehouse Assistant

91% of charities questioned a year after the secondment said that the volunteer's contribution to the charity resulted in a positive impact for the community

SUPPORTING OUR LOCAL COMMUNITIES

Charities by type



THE CHARITIES

Partners chose to work with charities which are important to them and their local communities. The types of charities selected remains similar year on year.

WHAT THE CHARITIES SAY ABOUT THEIR SECONDEES

“ The secondee subsequently personally volunteered with the charity as a driver for one of our groups and suggested further support for areas of our business which were under-resourced such as HR. Further advice and signposting has been offered on business improvement and change as the Charity grows. ”

Mary Rance,
Chief Executive Officer
Contact the Elderly

“ I have a lot of respect for the Partnership for developing this programme for charities and the community. The skills and knowledge that you are able to provide charities with during these secondments is brilliant. ”

Joanne Thompson,
Chief Executive Officer,
Millie's Trust

19,243
TOTAL HOURS
INVESTED IN
2015 - 2016

2015 LOCAL COMMUNITIES SUPPORTED



PARTICIPATING BRANCHES FROM ACROSS THE PARTNERSHIP



MEET THE TRUSTEES

Partnership Chairman's appointed Trustee



Tracey Killen
Chair of trustees

Partnership Council Elected Trustees



Mark Anderson
Deputy Chair



John Hagues



Shalabh Baijal

Trustee nominated external appointees



Roger Jefcoate



Yetunde Hofmann



Sarah Vallins

INFORMATION FOR PARTNERS AND CHARITIES

What the Trustees are looking for

- A strong skill match between Partners and their secondment projects
- Secondments which will deliver a long lasting impact which continues beyond the secondment period
- Projects which are important to the local community
- Secondments which help the charity to achieve objectives which would otherwise be out of reach

Why do it?

Charities benefit from skilled and motivated volunteers and the secondment experience is an enriching one for both Partner and charity, leading to the development and sharing of new and existing skills.

The Partnership continues to be the Partner's employer and rights to benefits continue. The Trust takes on the Partner's pay during the secondment which allows the business to cover the Partnership role during the secondment.

How long can a secondment be?

Secondments are flexible, from one week to six months, on a full or part time basis, depending on what the project will entail.

When awards are made

Secondment awards are made twice a year at Trustee meetings in Spring and Autumn. The scheme is competitive, where a request is unsuccessful applicants are often invited to reapply.

Would you like to know more?

For Partners please visit the Partner Intranet where you will find more details about the application process and also some charities advertising roles for which they are looking for secondees help. You can also source your own charity.

For charities more information can be found at <http://www.johnlewispartnership.co.uk/csr/our-communities.html>



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