

retailTRUST[®]

IMPACT REPORT

2019



IMPROVING LIVES
THROUGH EMOTIONAL, PHYSICAL,
VOCATIONAL AND FINANCIAL WELLBEING

DEAR SUPPORTERS,

What a year the industry has faced and indeed the country! We have not had to seek out our challenges.

Despite all the structural and political uncertainty, we can report another successful year on our journey to becoming the premier wellbeing services organisation for retail and the allied industries. Delivering £5.69 for every £1 invested is something you can all be proud of as you enabled us to achieve it.

In the following pages you will see a mixture of achievement over the last year and ambition for the coming year. We hope it will encourage you to believe that we are moving forward at pace, with agility, with innovative thinking, and an understanding and empathy for what is needed by the grass roots of our sector.

It is only through your patronage, guidance and support that we have been able to improve the lives of those in need.

We thank you for every hard earned penny of your money which you allow us to put to work to the benefit of ALL involved.

With our enduring thanks,

Alistair McGeorge, Chair of Trustees

Richard Boland, Chief Executive
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OUR YEAR IN NUMBERS

retailTRUST^{FT}

TOTAL SOCIAL
AND ECONOMIC
VALUE
£48,434,704

INPUT
(invested by
retailTRUST)
£8,513,108

SROI
RATIO
£5.69
of value created for every
£1 invested

10,000

retailers supported
including independent,
online and national businesses



67%

more critical
incidents supported

217,655

helpline and online
support sessions

8,199

counselling sessions
including telephone, face-to-face and CBT



SOCIAL AND ECONOMIC IMPACT

A way of expressing the effect our services have on the people we help

The Public Services (Social Value) Act 2012, requires people who commission public services to think about how they can improve the social, economic and environmental wellbeing of their local area. Before they start the procurement process, commissioners are asked to look at whether the services they are going to buy, or the way they are going to buy them, could secure these benefits.

We have worked out the social return on investment (SROI) ratio by calculating the value our services offer to people and their communities against the cost of delivering those services.

We believe the measurement provides the strongest evidence of the value for money we deliver and is a key driver for developing a social value policy to be at the core of our services and programmes.

Working in partnership with Social Profit Calculator, we have measured the social and economic impact our services have on the people we help.

retailTRUST delivered over £48 million of social and economic value to individuals and local communities. The total includes savings to the NHS through improved health and wellbeing, reduced welfare benefits, and increased HMRC revenue through supporting people to find employment.*

Find out more about our impact at retailtrust.org.uk/impact

WORKING IN PARTNERSHIP WITH
SocialProfit Calculator

When we support someone, a series of events take place to improve their overall wellbeing and quality of life. Throughout this report we will highlight this process for each of our services and programmes.

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TOTAL SOCIAL AND ECONOMIC VALUE
£48,434,704

INPUT
(invested by retailTRUST)
£8,513,108

SROI RATIO
£5.69
of value created for every £1 invested

HELP

NEEDS
Problem being addressed

£8,513,108

INPUT

Amount invested by retailTRUST

ACTIVITIES

Services and programmes delivered by us or through our partners

OUTPUTS
Results of the activities



OUTCOMES

Improvements to the quality of life and the overall wellbeing of individuals



£48,434,704

TOTAL VALUE

Total social and economic value created by retailTRUST

*All figures calculated using the HM Treasury approved methodologies.

We help individuals get into work, progress their careers, develop new skills, access resources and fund business ideas.

What have we done?

We supported 400 individuals through our pre-employment programme and upskilled 100 employees facing redundancy in partnership with the House of Fraser Foundation and Sports Direct.

We awarded 200 grants using the £15,000 funding we had received from BlackRock Philanthropy. The grants offered food and clothing vouchers to individuals on our pre-employment programme.

We also provided £30,000 of life-changing educational grants to support our retail colleagues and their families with training needs and university costs.

Our Retail Leader Apprenticeship Degree will support up to 400 students from October 2019.

Where are we going next?

The new Assistant Buyer and Merchandiser Level 6 Apprenticeship has been approved for delivery. We aim to have up to 400 retail colleagues enrolled within the next year.

As part of our ongoing commitment to support the wellbeing of individuals and advancement of careers in retail, we have been approved as an end-point assessment provider by the Education and Skills Funding Agency.

Up to 400 students are due to enrol to study the Retail Leader Apprenticeship Degree, which is the first initiative of its kind for the sector. The programme prepares colleagues to face the challenges of leading in the evolving and dynamic retail environment of the 21st century by developing confident, capable and resilient retail leaders. In its first year, over £2 million worth of apprenticeship levy funds will be accessed and reinvested back into the industry.

“With the skills and knowledge I will gain from the Retail Leader Apprenticeship Degree, I genuinely feel that the bar will be broken and I will get the opportunity to progress and develop my career in ways, I could only have dreamed possible before.”

Adam Jones,
Deputy Store Manager, Dunelm



£1,168,208



£14,608,248

NEEDS

Individuals are looking to gain employment in retail, develop new skills, or progress their careers

INPUT

£1,168,208 invested through retailRIGHT

ACTIVITIES

Pre-employment programme, upskilling initiative, educational grants

OUTPUTS

400 people supported through the pre-employment programme, 100 people attended the upskilling workshops, and 12 students received educational grants to pay for their university fees or accommodation costs

OUTCOMES

Fiscal savings to the government, decreased welfare benefits, more people paying tax and national insurance, increased confidence and self-esteem, improved wellbeing, and being able to provide for the family

TOTAL VALUE

£14,608,248 of value was created by retailRIGHT

SROI RATIO
£12.50
of value created for every £1 invested



IMPROVING LIVES BY UPSKILLING RETAIL COLLEAGUES FACING REDUNDANCY

We worked closely with the House of Fraser Foundation and Sports Direct to support the upskilling of 100 employees, ensuring that individuals had both the relevant life and digital skills to take up other opportunities across the industry.

“Over the last 12 months, we’ve gone through a journey at House of Fraser to cope with challenges that other retailers may too be facing. We found ourselves in the position where we have had to close stores which has resulted in redundancies for individuals where we weren’t able to re-deploy. We pulled together a number of initiatives using in-house experts and local partners to support those facing redundancy and one of those initiatives which has had tremendous success is the retailTRUST digital upskilling project.

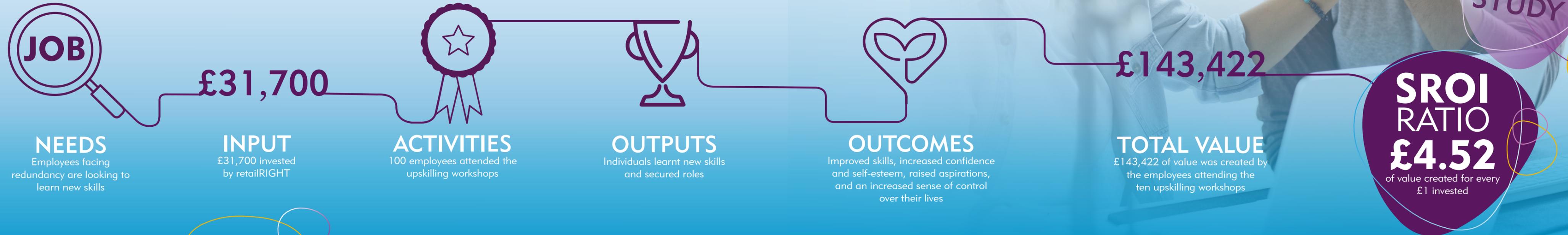
“Colleagues with varying levels of digital knowledge and expertise attended the ten sessions and have found them to be useful in supporting them to secure new roles and build their skills and knowledge in the world we now live in. It’s been amazing to see individuals who were really nervous with regards to anything digital, leave the sessions full of confidence!”

Charlotte Richards,
Learning Manager, House of Fraser

“All of this information was absolutely invaluable, especially at this time of feeling very vulnerable. I feel that the digital upskilling session has taken away one of my barriers and I am confident that I have a great and bright future ahead of me.”

Jane Wealthall,
Service Manager, House of Fraser

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We offer counselling, cognitive behavioural therapy (CBT), financial assistance, personalised wellbeing support, non-repayable grants, critical incident support and legal guidance. Our free and confidential wellbeing services are available around the clock.

What have we done?

As we continue to innovate to meet the evolving needs of today's workforce, we have diversified our offer which now includes personalised digital wellbeing support through myrtwellbeing.org.uk.

Our confidential wellbeing site contains over 350 pieces of expertly curated digital content covering over 85 different topics. Our aim is to make it easier for people to access preventative self-help tools to manage their wellbeing, get help and develop their skills.

We delivered 8,199 counselling sessions and provided 31,081 support sessions. We offered £411,644 of non-repayable grants to help individuals during times of need. We also supported 67% more critical incidents.

Where are we going next?

Working closely with our Chief Medical Advisor Dr Adrian Massey and partner organisations, we will widen our reach and enhance our offer to support people's emotional, physical, vocational and financial wellness.

Preventative and proactive support will continue to be a key focus so that individuals can get relevant and timely assistance before any issues escalate.

We are planning our first Wellbeing at Work Forum to help organisations take their wellbeing strategy to the next level.



We were delighted to appoint Dr Adrian Massey as our Chief Medical Advisor on 1 July 2019. Adrian is a consultant occupational physician who has worked in medical practice for 22 years, and is the renowned author of 'Sick-Note Britain'. For your copy or to find out more, email Sue Davies at sdavies@retailtrust.org.uk

Confident, empathic and empowered line managers are pivotal in minimising the impact of health issues on an organisation and its bottom line."

Dr Adrian Massey,
Chief Medical Advisor, retailTRUST



£2,063,600



£16,455,398



NEEDS
Individuals are experiencing difficulties and need emotional, physical, vocational or financial support

INPUT
£2,063,600 invested through retailHUB

ACTIVITIES
Wellbeing services

OUTPUTS
Delivered 31,081 support sessions, provided £411,644 of grants, delivered 8,199 counselling sessions including telephone, face-to-face and CBT, and responded to 132 critical incidents

OUTCOMES
Reduced risk of homelessness and being burdened by debt, relief from depression or anxiety, and improved health and wellbeing

TOTAL VALUE
£16,455,398 of value was created by retailHUB

SROI RATIO
£7.97
of value created for every £1 invested

IMPROVING LIVES BY SUPPORTING FIVE-YEAR-OLD JAKE'S CANCER TREATMENT

Jake Cohen has been battling high-risk neuroblastoma, a particularly aggressive childhood cancer, since 2017. Almost 50% of children diagnosed will relapse at some point, and when that happens, sadly less than one in ten survive.

Jake has received extensive treatment and undergone numerous procedures as part of his treatment plan. Jake's parents applied for a grant as they were raising funds to access further treatment, which is currently not available on the NHS.

"Watching your child going through intensive cancer treatment is horrific. Every drug Jake has received has potential long or short-term side effects and he has spent more time in hospital than most people do in their lifetime. However, he deals remarkably well with everything that is thrown at him and he has a happy, positive outlook on life."

Adam,
Jake's dad

"Adam, who works in the supporting service industries, contacted us for help earlier this year. We were delighted to support the family's efforts in raising funds to secure the next step in the treatment plan. We'll keep in touch with the family to see how we may assist in the future."

Neil Duffy,
Director of Wellbeing and Funding, retailTRUST

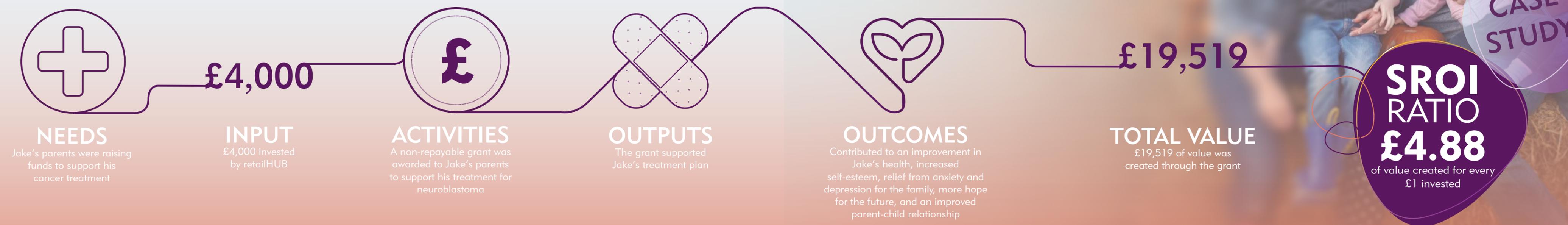
Neuroblastoma is so complex to treat and Jake's journey could take any number of routes. We just want to ensure we are ready for whatever the future may bring in terms of Jake's treatment and it could cost hundreds of thousands of pounds."

Hannah,
Jake's mum

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CASE STUDY



cottageHOMES[®]

Our retirement estates in London, Derby, Glasgow, Liverpool and Salford offer supported living in a community setting. We provide a much-needed safe haven where individuals can thrive, retain their independence and access help and support when needed, fully enjoying the highest quality of life in their later years.

What have we done?

Our £15 million redevelopment of our Crookfur Estate in Glasgow continues. The first 46 digitally-enabled and accessible flats are due for completion during early winter 2019.

As part of our strategy, we are developing and designing a digital technology package to enhance the health, safety and wellbeing of our residents. We started a six-month digital care pilot with five residents at the Crookfur Estate and the findings have been extremely positive. More information can be found on the following pages.

Where are we going next?

We will be developing 12 new accommodation units on our Leylands Estate as well as a guest flat. The building work is anticipated to start in spring 2020 and could take approximately 12 months to complete.

We will be converting empty office space into 10 additional flats on our Mill Hill Estate. The project is due to start in winter 2019.

As we implement our digital strategy across all five of our cottageHOMES retirement estates, we will open up a whole new world for our residents.

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NEEDS

Retail retirees wish to live independently in a safe and happy community with like-minded people

£5,251,300

INPUT

£5,251,300 invested through cottageHOMES



ACTIVITIES

Retirement estates with supported living in a community setting

400

OUTPUTS

400 residents supported across five estates



OUTCOMES

Reduced financial impact on health and care costs so more resources are available within GP surgeries and hospitals

£17,371,057

TOTAL VALUE

£17,371,057 of value was created by cottageHOMES

SROI RATIO
£3.31
of value created for every £1 invested

IMPROVING LIVES THROUGH SMART HOMES

CASE STUDY



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In February 2019, we started a six-month digital care pilot with five residents at the Crookfur Estate. We are now rolling this out across all the estates.

On the first day of the pilot we identified concerns regarding a resident who has dementia. Motion sensors detected that her sleep pattern was erratic and she was unsettled throughout the night. It was also found that the resident was accessing her medication cabinet on numerous occasions, which should only have been accessed once a day.

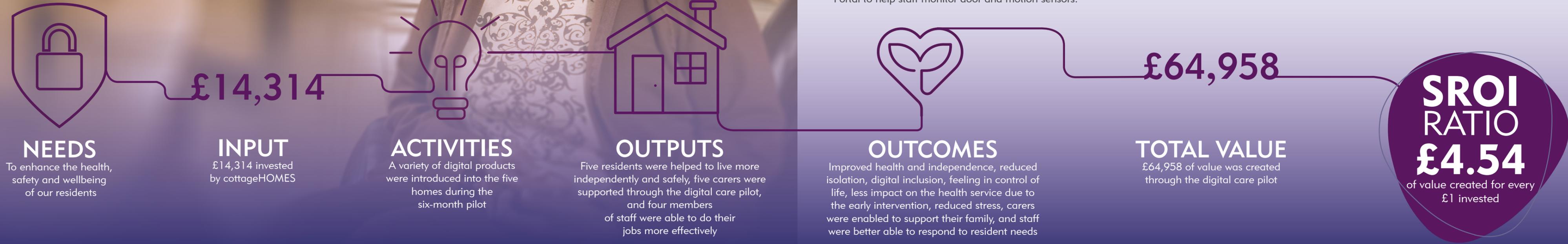
“Had they not agreed to take part in the digital care pilot, they would not have been aware of any issues.”

A variety of products were introduced into their homes including a:

- Digital carephone enabling video calls
- Digital assistant to set reminders
- Smart doorbell
- SafeMotion watch with a GPS tracker
- Portal to help staff monitor door and motion sensors.

The resident’s son, who is her main carer, was immediately made aware of concerns around her sleep pattern and access to medication. He was able to take information from the portal to the resident’s consultant. It was identified that a side effect of the medication prescribed for the resident was insomnia and her medication was then reviewed.

The family have commented that, had they not agreed to take part in the digital care pilot, they would not have been aware of any issues regarding their mother’s sleep pattern and medication management which they have now been able to address.



INNOVATING FOR THE FUTURE

We will be revolutionising our services and programmes to enhance our social and economic impact over the coming year.

Transforming wellbeing through preventative self-help resources

A brand new addition to the holistic support offered by retailTRUST is our wellbeing website which launched in May 2019. The confidential site contains expertly curated digital content which can be personalised to support the wellbeing of you and your colleagues.

Our aim is to make it easier for people to reach out and proactively access self-help tools to manage their health and wellbeing, and develop their skills.

For more information, visit myrtwellbeing.org.uk or email Cliff Lee, Head of Wellbeing, at clee@retailtrust.org.uk

Access over 350 pieces of digital content covering 85 different topics across the following areas



Looking after you

From understanding mental health conditions to coping with an illness, through to the benefits of healthy eating, there is a variety of information available to support a person's emotional and physical wellbeing.



Developing you

A diverse range of content is available including tools, tips and online courses to support a colleague's personal and professional development.



Financial support

Non-repayable grants are available to help colleagues during times of need. We can signpost individuals to trusted partners who can assist with redundancy, debts, savings, loans and legal questions.



Life events

Colleagues can access guidance to help them navigate through unexpected life events such as a loss or bereavement, personal trauma, relationship breakdown or an illness.



Anonymised insights



Multidimensional learning

myrtwellbeing
myrtwellbeing.org.uk

We delivered 217,655 helpline and online support sessions which are projected to increase by almost 25% next year based on current trends.

217,655

helpline and online support sessions delivered last year

caring | innovative | trusted

25%

increase projected for next year based on current trends

NEW
FOR 2020
Our chatbot will further grow reach and relevance



INNOVATING FOR THE FUTURE

Creating the next generation of retail buyers and merchandisers

The second in a series of degree level apprenticeships for retail has been approved for delivery next year!

The Assistant Buyer and Merchandiser Level 6 Apprenticeship will address the sector's future skills requirements by bringing the world of business and education closer together. The programme will develop the high-level technical skills needed for the buying and merchandising retail jobs of the future.

Our brand new programme has been developed in partnership with the government and over 30 retailers including John Lewis, Marks and Spencer, Sainsbury's and Steinhoff UK.

Over the 24-month programme, retailers can claim back up to £10,000 of levy funds per student. We expect up to 400 students to enrol within the first year and over £2 million of levy funds to be accessed and redistributed back into the industry.

This apprenticeship will create the next generation of retail buyers and merchandisers as employees will develop the key skills required to understand both the brand and customer. They will be able to anticipate and shape customer demands and market trends.

Individuals will learn to source, select, maintain and deliver the right products to meet customer needs and business objectives.

“This fantastic initiative will enhance the prospects of retail employees who are seeking to progress their careers. It will also inspire individuals who are thinking of joining the industry, which will raise the status of vocational routes to study and enable more people to view retail as a first choice career.”

For more information, email Amy Prendergast, Head of People and Vocational Learning Services, at aprendergast@retailtrust.org.uk



“AS A CHARITY, WE FOCUS ON THE PEOPLE, NOT PROFIT.”

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EPA development

Our new high quality end-point assessment service will be up to 20% cheaper than existing providers

Available in 2020, our independent and industry-focused end-point assessment service will initially be available for assessments across the Level 2 Retailer Apprenticeship and the Level 3 Retail Team Leader Apprenticeship. As the service expands and grows, it will cover the Level 4 Retail Manager Apprenticeship and the Level 4 Buyer and Merchandiser Apprenticeship.

As the retail sector's wellbeing charity, our driving principles focus on the people, not profit. This means that our rates for end-point assessment will be the most competitive in the sector and up to 20% cheaper than existing providers. By working with us, organisations will be able to spend more of their funds on training their apprentices rather than their assessments.

We will also recruit assessors from those facing redundancy in retail to retain more people within the sector. These trained and experienced industry experts will provide the right level of assistance to apprentices throughout the end-point assessment process. Apprentices will be able to access personalised digital wellbeing support through myrtwellbeing.org.uk.

For more information, visit retailtrust.org.uk/epa

INNOVATING FOR THE FUTURE

Pioneering healthier ageing through smart villages

Supporting the wellbeing, safety and independence of our residents

As we continue to innovate our retirement estates, residents will have much greater choice over how they receive the care and support needed to maintain their independence and safety, and enhance their quality of life.

Our cottageHOMES estates meet many of the challenges associated with later life which tie into the healthy ageing agenda.

Living within a community of like-minded people reduces social isolation and improves the quality of life for older people. The average life expectancy after retirement is 15 years. When benchmarked against our residents, we found that this figure rose to 21 years, meaning that retiring to a service such as cottageHOMES may extend life by another six years. This is based upon entering our estate at the retirement age of 65.

Our estates encourage physical activity and social engagement to create healthy and active communities. We run a series of daily activities across all five estates to aid social connection.

With the implementation of digital technology enabled care, more innovative products and services will be available to enhance the health, safety and independence of our residents, and give them more control over their lives.



Get involved

Individuals from all walks of life can get involved in the transformation of our estates. Your support will help us provide a happy life and secure future for those who need it the most. **For more information visit retailtrust.org.uk/supported-living**

Leading the way with our wellbeing workshops and regional forums

Tailored wellbeing sessions to meet the needs of your team

retailTRUST supports retailers to improve the lives of their employees, performance, and the bottom line with workshops designed specifically for the demands and challenges of the sector. People working in this ever-changing environment will gain practical skills, confidence, and understanding of best practice around many areas of mental wellbeing.

Our national network of experienced facilitators, all of whom have experience in retail and mental health, can also help your organisation to design bespoke workshops to suit your specific challenges.

Workshops include:

- Supporting others experiencing emotional distress
- Mental health in the workplace
- Drug and alcohol misuse
- Suicide awareness and prevention in the workplace.

Since 2018, retailTRUST has been proud to deliver wellbeing workshops to over 800 of Aldi's managers.

“retailTRUST provides an excellent service and we thoroughly enjoy working with them. This year the Trust has delivered an insightful course for Aldi's leaders about supporting others experiencing emotional distress, which has been extremely well received. Our recent visit to their offices further demonstrated the dedication and expertise of the Trust's colleagues, and their hard work to support thousands of colleagues working in retail.”

Sophie Smith,
HR Admin Director, Aldi

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Supporting your wellbeing strategy through our regional forums

As the need for employee wellbeing continues to evolve and grow, we will be hosting more Wellbeing at Work Forums. The one-day events will showcase best practice and key trends in the workplace encompassing emotional, physical, vocational and financial wellbeing. Delegates will learn about the strategic and practical elements of developing wellness programmes.

The forums are beneficial for anyone wanting to accelerate their employee wellbeing and engagement strategy including chief executives, operations directors, HR teams, regional managers, mental health first aiders, wellness ambassadors, and occupational health teams.

For more information about our wellbeing at work initiatives including how you can get involved, email Neil Duffy, Director of Wellbeing and Funding, at nduffy@retailtrust.org.uk



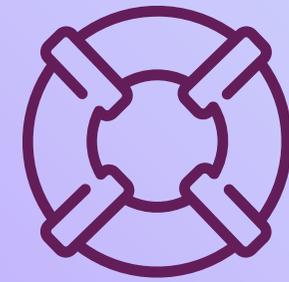
retailTRUST has been improving the lives of everyone involved with retail since 1832. We change lives by supporting people's emotional, physical, vocational and financial wellbeing.



Emotional and
physical support



Vocational
support



Financial
support

Thank you to the 10,000+ retailers and partners who support us!

retailtrust.org.uk | myrtwellbeing.org.uk | info@retailtrust.org.uk

