



Retail
TRUST
1832 ONWARDS



Impact report 2021.

Creating hope, health and happiness for everyone in retail

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A new era for the Trust and a new era for retail.



Alistair McGeorge
Chair, Retail Trust

“This impact report deals with a year ending April 2021, spanning a period of profound change in our society, where the pandemic has dominated and subsequent lockdowns have asked questions of the way we work and live.

Our industry has, once again, been on the frontline of the pandemic, implementing at pace unprecedented structural change, whilst keeping employees and customers safe from the dangers of COVID-19. The pandemic has shone a spotlight on the role retail can play as a force for good, as grocers kept the nation fed, essential retailers ensured we had access to the goods and services we need, and organisations of all shapes and sizes reframed the responsibility industry has to improving public health.



As we seek a path in the new landscape we find ourselves in, it's clear to see that businesses have a central role to play in how society deals with some of the biggest health and social issues of modern history. While retailers have risen to the challenge in supporting their people's health and wellbeing, this new environment highlights the need for the Retail Trust more than ever. Put simply, the Trust has never been more relevant in its 190-year mission to provide hope, health and happiness for everyone who works in the retail industry.

The Retail Trust has enjoyed a unique opportunity to influence the approach of the sector to the health and wellbeing of retail colleagues, growing our services and the number of organisations turning to us for help. And, by expanding our

enhanced training programmes, we've helped upskill hundreds of leaders across the retail sector in mental health leadership.

As employers and employees continued to adjust to the emergent situation during the year, we prepared to relaunch the brand, highlighting the purpose of the organisation since inception to promote hope, health and happiness for all involved.

Despite the challenges COVID-19 has placed on running a programme of live events, we launched and hosted our first digital conference to highlight the role leadership plays in enhancing the wellbeing of an industry and relaunched our ambassador programme in order to build on our ever-expanding network of influence in UK retail. →

Chair's message

Meanwhile the outstanding teams on our supported-living residential estates have continued to deliver industry leading care. We maintained high levels of confidence in our housing provision thanks, in part, to our investment in smart technology at the beginning of May 2020.

All of this has resulted in a 71 per cent increase, year on year, of our social and economic value. For every £1 the Retail Trust spent last year, we created £11.73 of social and economic value. This improvement has been driven by new services delivered through our website and our provision of mental health wellbeing training services for 2,300 managers and retail staff. Some 97,863 people accessed our helpline and digital self-help support, we received more than 12,874 helpline calls for in-the-moment support, delivered nearly 7,000 counselling sessions to colleagues for a range of mental

health worries, and provided nearly £800,000 in financial aid to those struggling the most, double the amount we gave last year, which really highlights the financial impact COVID-19 has had on families in the UK and the need for our help.

This extraordinary performance has allowed us to continue to deliver on our purpose to support everyone who works in retail. We believe the health of our colleagues is the foundation they need to flourish in both work and life, creating a more sustainable and successful future for retail.

This is a new era for the Trust. But we must also see it as a new era for retail. We continue to grow our coalition of businesses and leaders with a joint purpose of helping our colleagues succeed, building a happier, healthier, diverse and inclusive workforce that's key to the success of retail."

"Together we have a once-in-a-generation opportunity to create the kind of industry that places the **hope, health and happiness** of its people at the centre of how we operate and leave a legacy for the next generation of retailers that ensures our sector and its people thrive."

Alistair McGeorge
Chair, Retail Trust



Our impact in a nutshell.



Provided
£779,095
in financial aid



Delivered over
6,700
counselling sessions



Received more than
12,800
helpline calls for
in-the-moment support



Fundraised over
£779,095

The methodology explained.

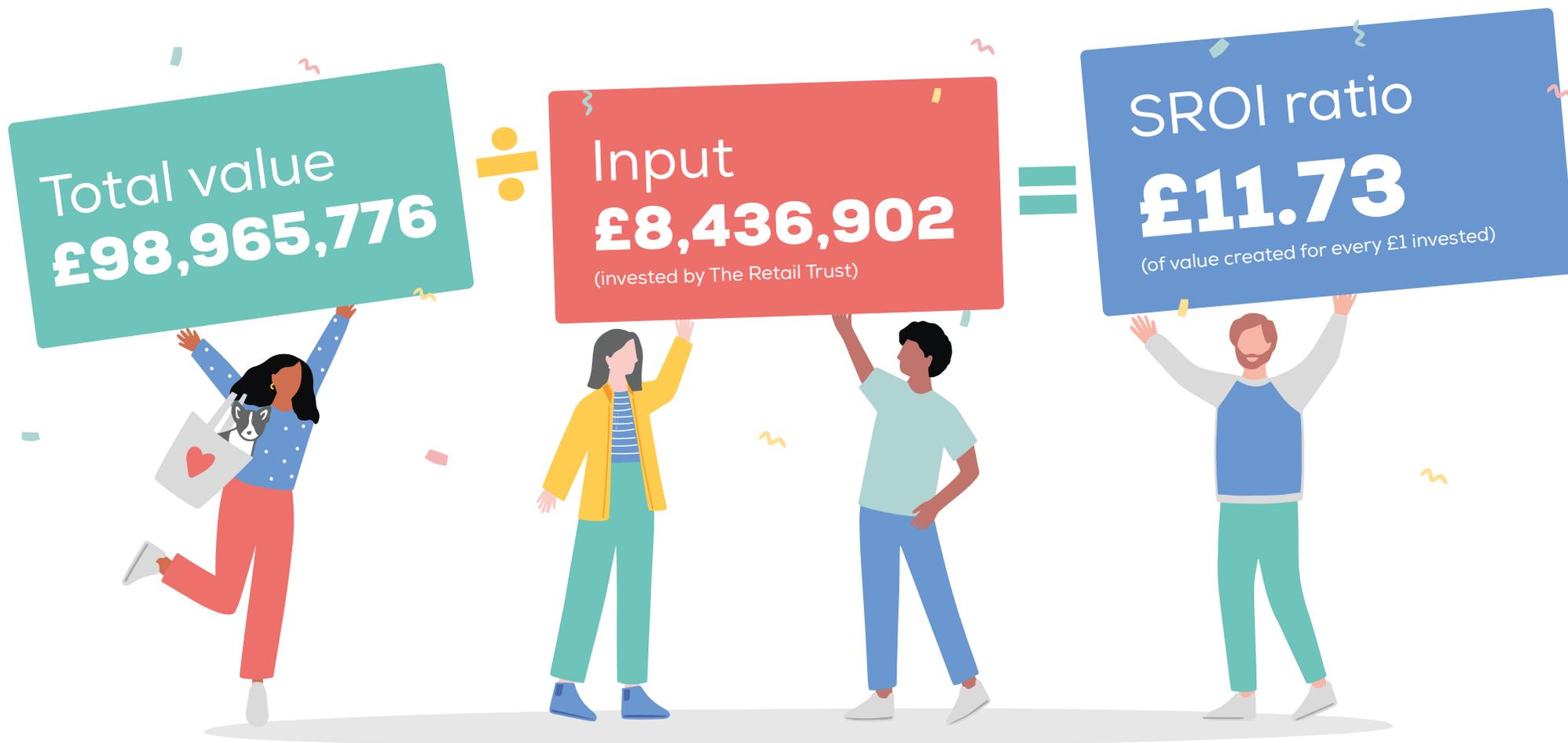
The Public Services (Social Value) Act 2012, requires people who commission public services to think about how they can improve the social, economic and environmental wellbeing of their local area. Before they start the procurement process, commissioners are asked to look at whether the services they 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 that this measurement provides the strongest evidence of the value for money we deliver. The figures have been calculated by Loop, our social value partner, who have used HM Treasury approved methodologies.

The Retail Trust delivered nearly £99 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

Last year's figures:

Total value £69,747,148

Input £10,244,067

SROI ratio £6.81

Why we do what we do.

As we approach 190 years since the Retail Trust was founded in 1832, it's worth remembering how our very first Chairman Thomas Helps described the purpose of the charity:

“To promote the happiness and interests of those engaged in the trade, whose industry, integrity, and character were too often insufficient to rescue them from suffering and want.”

This still holds true today. It guides everything we do, why we do it and what we believe in. In fact, we believe in it so passionately, our charity has become a movement with a very clear cause: to create hope, health and happiness for everyone who works in retail, from frontline workers to senior leaders. Whether they are at the start or end of their retail career, we put our colleagues at the heart of everything we do. Colleagues' health and wellbeing is the foundation they need to flourish in work and life. It is also critical to the ongoing success of retail. →



The Retail Trust sits at the very heart of the retail industry.

→ Working alongside retailers large and small we look after the wellbeing of their most vital asset, their people. We do this via our financial, emotional and physical wellbeing services, access to career-changing learning and development and supported-living estates. This unique retail expertise and collaborative approach helps colleagues and businesses thrive.



“After the Retail Trust training we have further confidence in our managers knowing they have a greater mental health awareness and the ability to support their teams when needed.”

Chris Bailey

UK Training & Apprenticeship Manager, SSP Group

“Since I have moved on to the estate I have felt the safest and most contented that I have done in over 20 years.”

Richard O'Brien

Resident

“Not only has the Trust lifted the weight of a big financial burden, it has also given me hope. And a feeling of knowing I deserve help, I deserve support and I deserve money.”

Libby Mata Harii

Retail colleague

Our people first approach.

Retail by its very nature is a people business and we put those who need help the most, right at the heart of what we do. Through our wellbeing services we build strong relationships at all levels in retail and work together with businesses to prepare and better equip leaders, managers and employees to deal with their wellbeing.

We believe in a world where everyone involved with retail is

able to access preventative and curative support to manage their wellbeing whenever they need it. Our wellbeing services offer a helpline, counselling, online self-help resources and cognitive behavioural therapy to support the emotional wellbeing of retail workers and their families. 96,100 people turned to us for in-the-moment and digital support. from May 2020 to April 2021.



Needs



Mental health and wellbeing services accessible for all

Input



£1,573,511

Activities



Helpline, counselling and digital support, virtual events

Outputs



Website rebrand, relaunch and refocus to make support more accessible, plus new channels of communication

Outcomes



Improved mental health support across all channels, reaching and helping more people

Total value created



£66,561,600

SROI ratio



£42.30
for every £1 invested

Improving mental health awareness

Our aim is to increase awareness and knowledge across the industry and to provide people with access to information, advice and guidance regarding wellbeing approaches to enable them to better manage their mental wellbeing. Where appropriate we also provide access to evidence based therapeutic interventions. Our unique expertise in retail, combined with a people-centric approach enables us to provide tailored preventative support that really makes a difference. 84,989 accessed our digital resources on a huge range of mental health and wellbeing issues, from depression, stress and anxiety to suicide awareness and domestic abuse.

We're there if people hit crisis point too

But we understand there's a great need for immediate assistance too and our helpline team are available 24 hours a day to support people with a plan for ongoing assistance. We took a call every 40 minutes from someone in retail who needed help (that's 12,874 calls in total) and delivered nearly 7,000 counselling sessions.

Financial aid is needed

Financial pressures can have a huge effect on people's mental health so the financial aid we provide is instrumental in helping those who are struggling most. From helping pay unforeseen household bills to buying a laptop to enable someone to continue with their studies, the Retail Trust has given £779,095 in financial aid to those who need it most.

"I found the Retail Trust on my Next employee portal. I am absolutely speechless and **overwhelmed by the support I have been given.** I would highly recommend the Retail Trust as I feel someone has listened to what I am going through and been able to make a big difference."

Next retail assistant, Andrea who contacted the Retail Trust for financial and emotional support after her partner was diagnosed with a colloid cyst on his brain.



“Retail Trust helped lift the weight of financial burden – and **gave me hope.**”

When retailer Libby Mata Harii made the brave decision to leave an abusive relationship with the father of her twins, she was under huge financial pressure. Suffering the emotional, psychological and physical effects of the seven-year abusive relationship Libby had to make the difficult decision to step back from work just as she was launching her own business, The Way of Tea, which increased the financial strain on her. →



Libby Mata Harii
Retail colleague

Wellbeing services - Libby's story

→ "I had to stop work in August 2020 due to the extreme mental health issues I was experiencing, I had had psychotic episodes, suicidal thoughts and eventually I had a breakdown.

"My business had just started to be successful and I had to drop it all to make myself and my children better. Which meant our finances were pushed to the edge. With threats of legal action from various businesses and letters coming through the door every day demanding money while the only thing I could think about was how desperately sad my children were and how pointless my life felt."

As the situation began to look desperate, Libby found the Retail Trust online and applied for financial support.

"It is almost impossible, when suffering from the effects of abuse, to think that you might be deserving of some help. But I was desperate and the staff at Retail Trust were so easy to

communicate with and so kind. It was a simple process which was brilliant as my mind is not able to cope with huge amounts of forms or numbers. But I was so grateful to Sue, who made it all feel so easy, and even more importantly, she made me feel like I deserved it.

"The Trust helped us pay our heating bills. It honestly lifted such a weight off my mind knowing we could turn the heating on at night. It helped the physical side of my recovery too - I have been very tired which is a side effect of trauma and the cold makes it much worse.

"Not only has it lifted the weight of a big financial burden, it has also given me hope. And a feeling of knowing I deserve help, I deserve support and I deserve money. These are all things that years of abuse made me feel I was undeserving of. So, it's not only helped us practically, it's helped me heal psychologically as well."



Needs



Financial support

Input



£500

Activities



Financial aid to heat home for family

Outputs



Able to pay bills and have the heating on in the home

Outcomes



Prevent getting further into debt plus psychological benefits of a warm house for Libby's children

Total value created



£867

SROI ratio



£1.75
for every £1 invested

Management training is key.

We conducted detailed qualitative and quantitative research in March 2021 across the retail industry which confirmed our belief that managers play a key role in supporting their colleagues' wellbeing at work. Which is why we have placed extra emphasis on our online manager resources and, in particular, our training courses. We trained 2,300

managers and retail staff, upskilling them in their approach to mental health and wellbeing and giving them a deeper understanding of the issues as well as practical tools to take back into the workplace to make a lasting difference. Our training programmes give £68.59 of social and economic value for every £1 spent.



Needs



Mental health and wellbeing training

Input



£66,125

Activities



Training for colleagues and managers

Outputs



Improved and extended training programmes

Outcomes



More colleagues provided with a wider range of training, reaching and helping more people

Total value created



£4,535,836

SROI ratio



£68.59
for every £1 invested

“The Retail Trust 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.”

Sophie Smith

HR Admin Director

Aldi



“The home should be a place where you feel comfortable and safe, but we know this isn’t always the case. We’ve worked alongside the Retail Trust and are going to be training all our managers on domestic abuse awareness and signposting too.”

Josie Dickinson

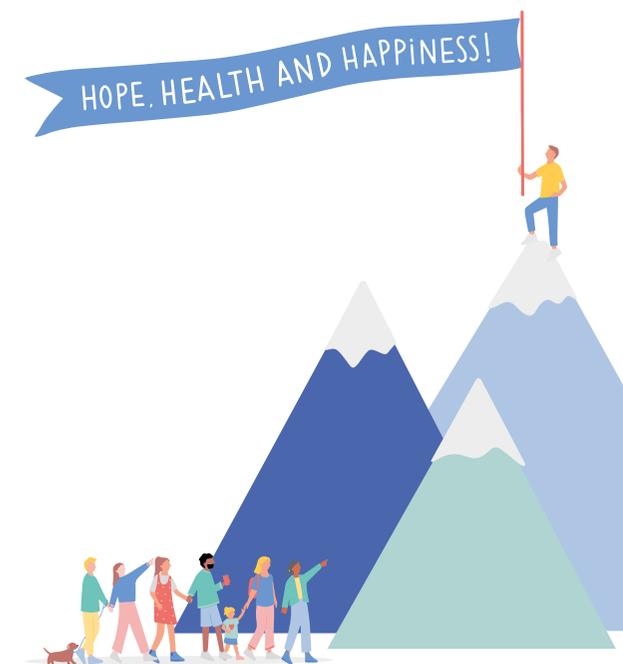
Inclusion, Diversity and Wellbeing Senior Manager
Dunelm

“The training with the Retail Trust, which we rolled out to all managers across the business, has really helped to build their confidence when talking to colleagues about any challenges they may be facing. It has improved their knowledge and understanding of the Retail Trust and their wide-ranging services. Our managers now understand the importance of their role in taking the time to listen to their colleagues and signpost where they can get support. The feedback from the managers was

overwhelmingly positive and the trainer was extremely engaging, we wouldn’t hesitate in using the Retail Trust again.”

Michelle Cockayne

Senior HR Business Partner
Screwfix



Championing people in retail to create the next generation of future leaders.

We passionately believe that where you start out in life should NEVER determine where you end up. Now more than ever before, we need to ensure that the meritocratic reputation of retail is protected, embraced and celebrated while transforming the lives of those that simply need to be given an opportunity.

Retail is one of the great engines of social mobility and is one of the few sectors where people can progress

from shop floor to the boardroom, no matter their background. We recognise the power of the retail sector to harness its ability and reputation to support the most vulnerable in creating credible pathways and progression opportunities. Through the Retail Trust's learning and development initiatives and programmes we help give young people the work and life skills they need to discover and unlock their talent. →



Opening doors for younger people.

The pandemic and resulting fallout for the retail industry was, in particular, challenging for young people due to many traineeships and apprenticeships being put on hold with temporary store closures. However, the Trust was still able to give 102 people the opportunity to start either

a traineeship or an apprenticeship degree, with a total cost of Government and apprenticeship levy funding accessed over £452,500. Again, the pandemic restricted the amount of pre-employment training we were able to provide, yet we still helped 31 young people get their first start in retail. We also provided 10 mentees with 60 hours of mentoring sessions, thanks to our brilliant elevator mentoring scheme, with a total value of £37,320. The Trust also helped 27 students with bursaries and scholarships to the value of £31,000 per individual.



Needs



Create career opportunities in retail regardless of a person's start in life

Input



£603,320

Activities



Apprenticeships, traineeships, mentoring, bursaries and scholarships

Outputs



Improve the outcomes for young people looking for a career in retail

Outcomes



Funding to help new leaders grow their business, young people learning new skills, training, guidance and insight into the industry

Total value created



£2,669,669

SROI ratio



£4.42
for every £1 invested

Seed funding helped kickstart our career.

"Being awarded seed funding has given our start-up, YARD + PARISH, a kickstart, and provided the brand with early-stage traction. The brand is an online curated shopping experience of black-owned, eco-friendly lifestyle products from homewares to beauty products. Without support from the Retail Trust we would have been at ground zero scrambling for ideas on how to get funding to get

this going! It's been an amazing journey so far. As Black-female founders, we have experienced the challenges of building a sustainable business in the face of systemic discrimination. As entrepreneurs and as customers, we understand exactly what it feels like to be an afterthought. Now more than ever, we encourage consumers to consciously make an effort to support Black-owned brands. There's a misconception that Black-owned means 'only suitable for Black people,' which is simply untrue. So, thank you Retail Trust for your financial contribution towards the start-up of YARD + PARISH."

Samantha and Alesha
Co-founders YARD + PARISH



Needs



Seed funding for business

Input



£5,000

Activities



Financial backing to help the business thrive in the pandemic

Outputs



Launched an online shopping platform for the brand

Outcomes



Helped a new business to thrive in a pandemic by pivoting to e-commerce

Total value created



£12,475

SROI ratio



£2.50
for every £1 invested

Creating happy homes.

We provide a much-needed safe haven and happy community for 460 residents in our five supported-living estates across the UK, including London, Derby, Glasgow, Liverpool and Salford. We have built communities where the over 55s can thrive, maintain their health, retain their independence, and get help when needed. With access to the latest smart home technology in our new digitally-enabled properties, our residents are able to fully enjoy the highest quality of life in their later years.

We have now completed 46 digitally-enabled homes across the Hugh Fraser Retirement Estate in Glasgow. This brilliant smart-home technology has been life-changing for some residents. The voice activated heating and lighting gives residents control over their lives and a greater sense of independence which has a profound effect on wellbeing levels. The Alexa devices we have provided have been invaluable through multiple lockdowns, allowing residents to very easily keep in contact with family, friends and also the support teams on site.



'I feel like I've
been given
**control of my
life** back.'

Mags, who lives in one of our new-build flats, had smart home technology fitted, including an Amazon Echo Show with Alexa, voice-activated light switches and sockets, a smart heating system and a video doorbell. →



Mags
Resident

Supported living - Mags' story

→ "I am not physically able to get around as I do not have the power of my legs and I require an electric wheelchair. Where I used to live I would struggle with switches and trying to turn on my lights as my hands are numb a lot of the time. I have even had to sleep with the lights on all night or the opposite and have had to fumble around in the dark if I can't get them on.

"I was offered an Alexa, and to tell you the truth I was not that keen as I had never used this before - but boy how this has changed my life! Alexa is like having a helper or a friend. I can just

ask her to put my lights on and off, and my heating, which is important, as I tend to feel warm at certain parts of the day. I can video call the staff at the reception area and video call the housing support workers in their office. I can set reminders and I do not find myself disorientated with time of day anymore. I am hoping to be able to video call with my family soon as they are getting an Amazon Echo Show too. As a disabled person the technology really has helped give me back some control over my life."

Mags
Resident



Needs



Increase quality of life, independence and connectivity for residents to stave off loneliness

Input



£3,271,880

Activities



Upgrade on estates, access to smart home technology

Outputs



More independent living due to smart technology controlling heating and lights, and able to instantly connect with support and family easily via video

Outcomes



Feeling safe and supported while still maintaining a sense of independence, raised wellbeing and happiness levels, plus enhanced feelings of contentment

Total value created



£9,768,176

SROI ratio



£2.99
for every £1 invested

"It's the **safest** I've
felt for 20 years."

Richard O'Brien, aged 65, moved into his flat in the Hugh Fraser Retirement Estate in July 2019. Previously he lived in a block of flats where, due to antisocial behavior from other residents in the block, he had felt increasingly fearful - too scared to leave his home without the support of his sister, Maryanne.

"Since I have moved on to the estate I have felt the safest and most contented that I have done in over 20 years. Before, I lived in a high rise block of flats and lived in fear every day due to the gangs, noise levels and the disturbances that went on day and night. →



Richard and his
sister, Maryanne



Supported living - Richard's story

→ "I suffer from chronic anxiety and depression and this environment really didn't help my health condition. It was my sister who suggested moving to the Hugh Fraser Retirement Estate. I now feel safe, happy and contented. I was a prisoner in my last home, relying on my sister to take me out to the shops and to all healthcare appointments, now I feel secure and safe enough to go to the local shops and for short walks on my own, something I haven't been able to do for years. My move hasn't just helped me, it's helped my sister too. She is now able to have more time for herself and her grandson and worries a little less about me."

"My brother lived in a high rise flat that had become very run down and full of undesirable people. He began living in fear, becoming a near recluse, only going out with me for doctors and hospital appointments. I had to do his weekly shopping as well as look after his affairs and call him every day to check on him. He kept his curtains closed all the time and never opened them for fear of people seeing in, adding to his anxiety and depression.

"Since my brother moved onto the Hugh Fraser Retirement Estate his life has improved greatly. I really can't believe the difference in his wellbeing - he has become more confident and feels safe. He now goes to the local shops and for short walks - he even pops into one of the neighbours and gets shopping for her! Since Richard has settled into his flat I have more time to spend with my grandson and family - and I have peace of mind that he feels safe and secure in his environment."

"I can't believe the difference in my brother's wellbeing since moving."

Richard's sister Maryanne watched her brother's life transform after moving into the Hugh Fraser Retirement Estate in Glasgow.

Needs



Increase in quality of life, independence and connectivity for residents

Input



£7,771.69

Activities



Upgrade on estates, access to smart home technology

Outputs



More independent living due to smart technology controlling heating and lights, and able to instantly connect with support and family via video

Outcomes



Feeling safe and supported while maintaining independence, raised wellbeing levels, plus enhanced feelings of contentment

Total value created



£9,615

SROI ratio



£1.24
for every £1 invested

Let's thrive in 2022.



Chris Brook-Carter
Chief Executive Officer

The impact of the Retail Trust, as shown in this report, is undeniable. Nearly 100,000 people have reached out for our support. Whether that's financial aid, our helpline and counselling sessions or the digital self-help services, we have been there to help our retail colleagues through their most difficult moments.

This need for help serves as a reminder of the incredible pressures those who work in retail have faced in the last year. 170,000 of our colleagues lost their jobs last year. Many more worked through extraordinary financial, physical and emotional pressures. They have done us proud, continuing to build this sector and the companies we all work for.

The Retail Trust, working together with the retail industry, now has a chance to ensure those efforts and the brilliant work retail organisations undertook to look after their people in the pandemic are the start of a new beginning.

We need to continue to work together to drive this transformation and change, to create the kind of industry that places the health of its people at the centre of how we operate and leave a legacy for the next generation of retailers that ensures our sector and its people thrive.

We at the Retail Trust will continue at pace into 2022, driving forward further transformation through the launch of new services, innovative products and increasing engagement with retail colleagues. Our vision is to respond to the fast-changing needs of the industry and its people and ensure we are the go-to partners for the sector as companies ensure health and happiness are defining principles of their cultures.



But we can't do it without your help.

In partnering with the Retail Trust in more numbers than ever before, whether through wellbeing services or fundraising, the generosity of this sector and its commitment to look after its people, has ensured record numbers have accessed our mental health support services, financial aid and learning & development opportunities, whilst allowing us to continue to expand our ability to look after people later in life through our residential retirement arm.

With your help we have been able to innovate our estates enabling residents to stay connected to their loved ones. We have continued to tackle issues such as social mobility and youth unemployment by opening doors for young people through our traineeships,

apprenticeships and pre-employment programmes. And, recognising that manager training is key, we have added to our portfolio of training courses and sessions to include a wider range of essential issues, from domestic abuse to menopause awareness, further answering the needs of our colleagues.

Ever since our very aptly named founder Thomas Helps called a room full of pre-eminent retailers to order in January 1832 and set out a vision of an organisation that would, 'promote the happiness and interests', of those working in our trade, the people of this sector have had somewhere to turn in their time of need.

This industry already has a proud history and legacy of looking after its own, a legacy we all now have a responsibility to build on and take forward because despite 190 years of service to our colleagues, our mission to create hope, health and happiness in retail has never been more needed.



Chris Brook-Carter
Chief Executive Officer



Retail TRUST

1832 ONWARDS

retailtrust.org.uk/impact



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REGULATOR

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