

# Impact Report 2017



LICENSED  
TRADE  
CHARITY



# Welcome

For more than 200 years the Licensed Trade Charity has been there for the people, and their families, that work within the licensed drinks trade. We help those in need, we support current workers, and we educate the next generation.

Much like the trade we support, our story and our purpose has changed and evolved over the years – and alongside our work with the drinks trade we also run a number of successful schools.

In this document we report on the impact we had in 2017 and outline our direction for the future.

## SUPPORTING PEOPLE FROM THE LICENSED DRINKS TRADE

### Information and guidance

**7,554 people** visited our website, including accessing our 60+ information sheets

**385 people** used our free helpline

**6,700 hours** were donated by charity service volunteers, fundraisers and trustees

### Grants

**£982,000** was provided in social and educational grants

**550 grants** were provided to people in need

**78 grants** were provided to support education or training



# CEO message



**We've been supporting the licensed drinks trade and its employees for the last 200 years. Pubs, bars, breweries and the people that work in them never stand still – and neither do we. It's why we evolve, adding new services and strengthening what we do. We make sure that when a publican, bar worker, or anyone with a connection to the trade is in need, we're there to help.**

There's an estimated 1.2m people who are or have worked in the licensed trade, and 3.8m more that are related to them – 200,000 of whom may need our help at any one time. The impartial support and advice we offer to those people directly and with partners from across the trade, enables them to live and work well.

We do the same through our schools at Ascot, Hassocks and Oxford. We always aim to inspire and educate young people, encouraging learning but also opening up career opportunities. Our schools are inclusive, adopting and establishing best practice for education and personal development across both mainstream and specialist educational settings.

The licensed trade continues to change, as does education and society in general. While this report looks back at our progress in 2017 we are committed to change, to be the forward thinking, relevant and meaningful occupational charity the drinks industry needs us to be.

**James Brewster**  
Chief Executive

## Support for young people with autism

**126 students** progressed through our two schools

**62% of students** completed GCSE's achieved grades A\* to C

**12 students** at LVS Oxford completed a BTEC Level 1



## LVS Ascot

**30% of GCSE grades** were either A\* or A

**93.2% of students** achieved GCSE's of A\* to C grade

**99.5% of students** achieved an A Level pass grade, with **48.2%** achieving A\* to B



# About us

**We have been providing support to people connected to the licensed drinks trade for over 200 years. This support has not only had a positive impact on the individuals and their families, but inevitably employers too.**

We offer financial and emotional support to those that are or have been employed in the sector, provide an excellent, and individualised, education through our schools in Hassocks, Oxford and Ascot, and we develop our volunteers and employees that are integral to our work. Whoever it is, we support the person, understanding their need and helping them reach their goals.

There are 5 million people connected to the licensed drinks trade – 1.2 million are directly employed or have been employed, and a further 3.8m related to someone that is. We want to be the first point of contact for any one of these people at times of stress, crisis or worry. It doesn't matter if these issues are seen at work or at home – we are there to help.

Our research ensures our relevancy. With loneliness a growing societal concern, our befriending services connect and rebuild confidence among retired workers, tackling isolation at its cause. The development of children is as important today as it was when we formed in 1793, and our educational grants support the children of licensed trade workers struggling with their academic development.

We adopt the same approach with our partners from across the trade. Working closely with both larger and smaller operators, we take the time to understand how we can support the business and its employees. Partner organisations can promote our services to their entire workforce, while we work at a management level providing both operational and strategic support.

Our schools at Ascot, Hassocks and Oxford extend our reach beyond the licensed drinks trade. Ascot is a non-selective independent school where students of all abilities and backgrounds are given the opportunity to flourish and succeed. While Hassocks and Oxford offer places to young people on the autistic spectrum, providing an education and start in life that promotes independent living.



# Our governance

With such a diverse reach, and with services that support so many vulnerable people, our internal processes and policies have to be robust, effective and wide-ranging. In response, our approach to governance considers everything from Trustee representation, to safeguarding, to volunteer support and development.

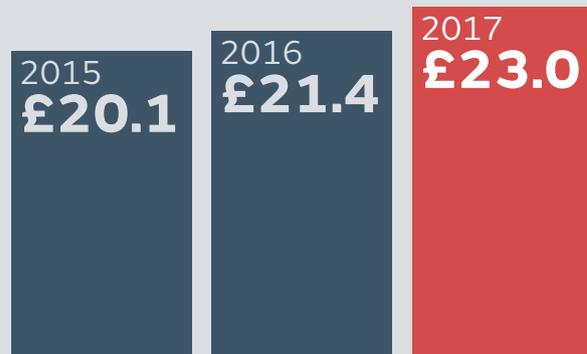
We must have the support of between 12 and 16 Trustees – and at the end of 2017 had 15 active Trustees (with one retiree and one appointment in the year). Collectively they guide all aspects of our organisation – charity services, education, membership and events. Trustees meet 8 times a year, and supporting committees enable the board of Trustees to provide specific direction to each part of our operation.

Internally we maintain a strong portfolio of policies and procedures. These are designed to ensure that across all aspects of our services we comply with regulation and legislation, and that our operations consider the beneficiary, our people, our volunteers and the environment in which we operate.

Our financial management ensures compliance with key legislation, effectively monitoring how we generate income and our ongoing expenditure. This is critically important in ensuring that both the commercial and charitable aspects of our organisation are effective now and into the future.



**TOTAL TURNOVER** £m



**TOTAL EXPENDITURE** £m

# Our approach

We continue to evolve, to support the changing needs of those connected to the licensed drinks trade, and to run successful operations that also allow us additional income.

The different operations need to deliver a positive impact for the people they work with. So we seek feedback from customers; check market conditions; employ people who are passionate about bringing a benefit to others and are mindful of the environmental impact we have.

## OUR OBJECTIVES

### Support

Offering emotional and financial support to those in need from across the licensed trade and beyond.



### Education

Inspiring brighter futures for young people through education, personal development and experience.



## SUPPORTING OUR DELIVERY



### Our People

Championing the professional and personal development of our employees and volunteers.



### Working with Our Trade

Enabling our industry to grow, attracting, developing and supporting talent.



### Our Charity

Supporting people working in or retired from pubs, bars and breweries, including the families of those people.



### Creating Independence

Creating opportunities for young people with autism through education and training.



### Bright Futures

Providing young people with an excellent education in a non-selective and co-educational environment.

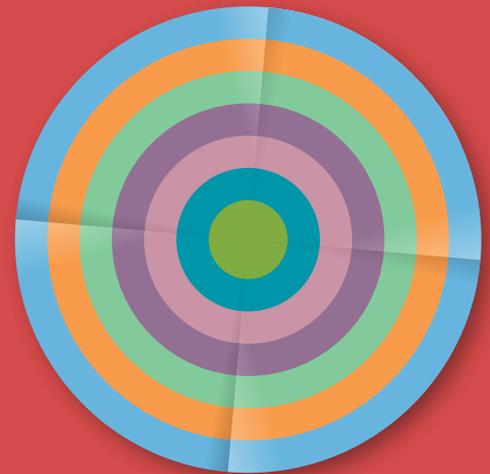


### Our Environment

Minimising our environmental impacts while inspiring those around us to do the same.

# Our objectives

We use the following performance indicators to monitor our work, ensuring that progress is being made and that impact is realised across our beneficiaries.



## Our Charity

	2017	Strategic target for 2021
Number of individuals benefiting from charitable support services (includes users of website, helpline and direct support)	8,300	12,900
Bursary, scholarship or support with fees for children of those connected with our trade	56	80



## Educating Children through our Schools

LVS Ascot	799	882
SEN – LVS Hassocks	74	64
SEN – LVS Oxford	52	64
Total Pupils in Education	925	1,010



## Our People

	2017
Employees	379
Volunteers	137
Volunteer hours donated	6,700
Employee and volunteer training units	2,503



## Our Trade

Time to Open Up Corporate Partners	4
Pubs and other venues reached	1,200
Employees reached	16,000



## Our Buildings

Investment in property and equipment	£2.3m
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# Our impact

The following pages provide more information on the support and services we offered in 2017.

We've used a combination of stories, statistics and case studies to demonstrate the benefit seen by our beneficiaries and partners.



# Time to Open Up

## Partnership working

Supporting employees of the licensed trade benefits employers and leased and tenanted pub companies as well.

In 2017 we partnered with three large employers of managed houses – Stonegate, Fullers and Youngs – to communicate our three-tiered personal support programme available to anyone connected to the drinks trade.

**Suzanne Haydon, Head of HR at Stonegate, said:**

*“The free helpline and financial support programme offered by the Licensed Trade Charity is proving to be invaluable for us. We now have free practical guidance on important topics such as coping with health issues, a helpline and financial support to tap into for any of our 13,000 employees. It makes it easier for us to look after our staff when they need it, which we believe fosters employee loyalty. If an employee is off sick from work and needs additional help, whether that is advice or financial, we can use the Licensed Trade Charity as part of our support package”.*



## Operational Support

A regional manager from one of our partner pub companies was faced with a death in service and the accidental death of a customer. Such tragic circumstances can affect the management, staff, customers and community around a pub – our role was to offer the advice and guidance that enabled the individual to manage their own feelings while also supporting those around them.

Helpline promoted to  
**23,000+**  
employees including  
1,300 Stonegate, Fullers and  
Young's premises

**385**

calls to our helpline

**7,554**

people accessed our online  
information sheets



# Opening up... talk to us about anything

Listening to and advising more people into a better place in 2017

## OUR COMMITMENT

Our website provides free-to-access information about managing and coping with a range of circumstances. In 2017 we moved to a new helpline provider, and now offer telephone support all day, every day. Our in-house team provide guidance around accessing benefits and other grants, a real life-line to so many of those that we help.

### Free 24/7 helpline

**385 people** contacted our telephone advice service in 2017.

**50% of calls** were directly related to **money worries**, while **15%** were about **housing** and fears of being made **homeless**.

We received many calls about **physical and mental health** – with **serious illness** or **stress at work** the significant causes behind these respectively.

Our helpline offers immediate practical and emotional support. Callers receive six free sessions on a range of work and personal issues. Six face-to-face counselling are also available.

For critical incidents our trained counsellors go onsite to talk to and support people affected by fire, terrorism or sudden death of employer.

### Help at your fingertips

Anyone can download one of our 60 online information sheets. These practical, step-by-step guidance packs are targeted at helping a person through a period of distress. Friends and family also use the information to better understand the needs or circumstances of a loved one. The information provided is constantly updated, and will include additional topics as we see a demand.



### A friend to call

19 volunteers provided **telephone befriending** in 2017. Regular 30 minute calls help connect 39 people of all ages, our beneficiaries range from 37 to 96, at risk of social isolation.

We want to give each person the confidence to be part of their community. Beneficiaries reported a **93% increase in happiness** and a **67% increase in confidence** following the calls.



**266**  
one-off grants benefited  
**525**  
people

# Opening up... when help is needed

Direct educational, financial and practical support for individuals and their families connected to the trade.

## OUR COMMITMENT

*At the core of our charity is a commitment to enable people to live better lives. Whether that's educational grants for the children of trade employees, financial support for current and ex-employees, or a contribution towards living costs for retired workers.*

### Help with housing

Licensees often struggle with housing after leaving the trade. One couple we supported couldn't find a new home due to debt and had all their furniture trapped in storage. We helped them through bankruptcy, reducing their debt, and a grant helped retrieve their belongings. They are now managing their finances and their physical and mental health is improving.

**£982,680**

provided in personal and educational grants

### BENEFICIARY PROFILE

#### Gender

**45%**

Female

**55%**

Male

**26%**

Families

#### Age

**18%**

20 – 39

**48%**

40 – 59

**34%**

60+

#### Job profile

**29%**

Bar staff

**21%**

Owner/Licensee/Tenant

**18%**

Manager/Supervisor

2.5 times more  
people accessed  
educational  
grants in 2017

2016

**21**

2017

**56**

### A great start

From our first steps in the 1700's we've educated young people connected to the trade. This continues today with grants available for everything from uniform, IT equipment, or school trips. We also offer grants towards places at LVS Ascot, where young people in need can join us from primary through to sixth form.

### Help at home

We've provided a home to many ex-trade workers since our earliest days. This continues through our partnership with Anchor Housing Trust. We help those with housing needs to understand their options, and then to apply for housing support. In 2017 23 people were able to move into Anchor Housing properties following our support.



of exam papers  
graded A\* - C



whole school  
attendance rate



students achieving  
GCSE grade D  
and above



students achieving  
BTEC Level 1

# Opening up... opportunity

Our schools in Oxford and Hassocks provide academic and vocational pathways for young people with autism.

## OUR COMMITMENT

*We focus on the individual, identifying opportunities for academic, social and workplace development that help our students reach their potential. Our support extends to the student's parents ensuring they too are involved at every step.*



### A focus on the person

Our approach removes barriers to school, enabling each person to access an education that creates future opportunities.

**Charlie, 18**, was a non-attender at his previous school, often only interacting through written messages. Our support empowered him to express himself, while smaller exam settings and relaxation techniques meant he could control his anxiety and sit his exams.

### Creating a learning environment

The social aspects of autism can affect attendance, and impact on how students interact with their peers, teachers and the building itself.

**Craig, 15**, missed years 7-9 as his mainstream school struggled to offer the support he needed. With help from our therapy teams he's now thriving at Oxford, recently becoming Deputy Head Boy and representing the school externally while working towards a Business Studies BTEC.

### Beyond an education

We look at how we can help each student progress into the workplace. Weekly work experience placements create independence and develop confidence.

**Amy, 16**, spent a day a week at Hair Essentials in Sussex. A busy, noisy, salon can be a difficult environment, but over time she has developed both work and personal skills, overcoming those barriers to becoming a hairdresser.



# Opening up... potential

Our independent school in Ascot creates excellent academic and vocational opportunities in an inclusive, non-elitist and co-educational setting.

**99.5%**

A Level pass rate

**93.2%**

of GCSE's in 2017  
were graded A\*-C

## OUR COMMITMENT

*We want every child at LVS Ascot to reach their potential and progress towards their career of choice. We offer both academic and vocational development in a way that is unique for an independent school. The environment is open and inclusive, with students from all walks of life studying side-by-side as they prepare for a life beyond education.*

799

students attended  
across primary to  
sixth form

### Pupil focused

Our students sit at the very centre of how we run the school. We get to know them, their parents, and their aspirations and then look at the educational pathway they will need to follow. We monitor their progress in the classroom, and have a full support network that ensures they develop the wider skills they will need after leaving school.

### Adding value

Students need such a wide skill base to prepare them for the workplace. Our commitment to 'Value Added' allows students to develop personally through completion of Duke of Edinburgh's Award Programme, by taking on positions of responsibility around the school, volunteering locally or within other aspects of our charity, or by completing international camps and projects.

### Creating passion

**We want our students to reach their potential.**

**Maisie** joined us on a drama scholarship in 2015, choosing LVS Ascot for its focus on creative and wider academic subjects. In 2016 she starred as Nancy in the schools production of *Oliver!*, an opportunity Maisie welcomes, "there are always opportunities for you to stretch yourself, learn more and gain help".



### Confident pupils

**We want our students to have the confidence to succeed, wherever life takes them.**

**Harry** joined us two years ago from a local school. In that time, he has grasped the opportunity; joining the debating team, playing multiple sports and starring in our theatre productions. Harry loves our TED projects – Think, Explore, Deliver – where students research a topic before presenting to the group.



# Opening up... developing our people

It is through the commitment and attitude of our employees and our volunteers that we are able to make a difference to the thousands of people we support each year.

**400+**  
employees and volunteers were working  
across the charity's operations in 2017

## OUR COMMITMENT

We think of our staff and volunteers in the same way as we do the people we support through our grants or in our schools. We want to develop, train, and inspire our people and our volunteers so that they excel and grow while they are with us, leaving them in a position to succeed in whatever may come next.

### The right start

Working with so many vulnerable people it's crucial that we employ the right people, with the right approach. Our recruitment process is very thorough and includes a 43 point checking mechanism to ensure that only the best people work here. Once offered a role, employees can access a full range of induction material weeks before they start to prepare for their first day.



### Supporting our people

We employ the right people, in the right jobs, with the right attitude. People who are flexible, multi-functional, intelligent risk takers, honest, and able to embrace change. In return we help them develop and grow. 2017 saw us deliver **2,465 training units** for our employees and **40 people** within the organisation achieved an **ILM qualification**. **10** of these have now secured a **promotion with added responsibilities**.

### OUR EMPLOYEE PROFILE

**67%**  
are female

**33%**  
are male

The average age is

**43** and

**31%**  
are under 35

**70%**  
have been with the charity  
for less than 5 years

Volunteers provided  
more than  
**6,700**  
hours support in 2017

### Volunteer support

33 volunteers are the first line of our charity services, meeting with and assessing the needs of the people that contact us. They can spend up to 5 hours talking to them about their situation and establishing a support plan. Its why we invest so much in them – enhanced security checks, initial and regular training, the support of a mentor, peer support networking and an annual awards dinner.

# Our environment

Across our three school sites, including the charity's operational headquarters at LVS Ascot, we are home to more than 900 students and nearly 400 employees. Managing and mitigating our environmental impact is important to us in an operational sense as it ensures we are efficient, but it is also important to our employees and our pupils.

We look to improve the way we run our buildings, reducing consumption and waste across the sites, but we also look to empower our staff and pupils to do the same. That can be initiatives that have an impact on-site, for example how plastics are used within our catering operations, or it can be influencing behaviours that have a benefit beyond the school gate.

Our investment in the school has and continues to be significant, **more than £2.3m was invested** through our capital investment programme in 2017. By 2021 **we will have invested a further £11.5m** as we look to bring forward a range of projects across the three sites.

As a responsible organisation we look at achieving impact across three broad areas as we aim to reduce, reuse and recycle more across our sites. We look at improving the way we work through improved processes and building management systems, we enhance and upgrade our buildings to increase efficiency and reduce consumption, and we work with our suppliers to ensure they share our aspirations.

## Monitoring consumption

With much of LVS Ascot already included in our advanced building management system our focus now is on extending this to include the junior school and boarding rooms. As a whole, the system enables us to better manage, monitor and understand how energy and water is consumed. By highlighting where consumption of electricity, gas or water is higher than expected we can investigate the causes of these – and then through our capital programme look at infrastructure improvements that facilitate a real and measurable reduction in consumption.

Over time, these savings will equate to reductions in our operational costs, but more importantly it will help reduce the overall environmental impact and carbon footprint.

## Capital improvements

In 2017 we invested more than £2.3m into our buildings and equipment. These improvements ensure we continue to provide an inspirational space for our students, but also offer clear environmental outcomes. Energy consumption is reduced as we continue introducing LED lighting across the buildings, while new more efficient mechanical plant replaces older boilers and pumps that took more energy to run and operate. In student and staff areas simple things like tap sensors and low flush toilets reduce water use, while behind the scenes the replacement of pipework reduces leaks, but also tackles thermal heat loss from our heating system. These and other programmes will continue over the coming years.



## Our suppliers

With so many companies sharing our aspirations around environmental and social responsibility we look to our suppliers to support our efforts. Sodexo, our catering provider, are a great example of how they support us operationally and how they can engage our students too. In 2017 this included bringing their chef team into the classroom, demonstrating the skills needed to progress towards the food industry, giving our students an insight to a career closely associated with the licensed trade.

They also promoted the importance of good nutrition to our students through awareness raising campaigns and through the breakfast, lunch and dinner choices available daily. While their exam breakfasts helped get our Year 11 students ready for the challenges ahead! In 2018 they will work with us and our pupils to reduce the use of plastic cups and straws across the three schools.

**Architects impression of our new dining hall at LVS Ascot, work to be completed in Summer 2018 includes new roof lights and acoustic baffles to improve the appearance of the facility and make it a more appealing environment for students and teachers.**

**£2.3m**  
invested through our  
capital investment  
programme

# Our trade

**The licenced trade employs a great many people, in a host of roles who are given the opportunity to grow and develop in a dynamic, energetic and rewarding profession.**

It is also a trade where many people are exposed to issues that can affect their development, their physical and mental health, and their relationships with those around them. The nature of business, with long hours, frequent interactions with people who may also be in real need, can create highly stressful situations.

Our support is there for when those situations get too much. When financial worries take control, when poor mental or physical health becomes a barrier to work and life, if old age or infirmity reduces your quality of life, or when living conditions become a block to a young person's development. Or indeed, when a professional in the trade finds themselves in need of a supportive and understanding ear.

This has been our mission for the last 200 years. It's still as important as it was back in 1793 and we want to continue working with the trade, its employers, employees and ex-employees to ensure each and every one has the support they need when they need it most.



# Our future

We will look to cement and extend our reach over the coming years. Our five-year strategy, through to 2021, challenges us to build upon our recent successes, stabilising the relationships and trust we have established with partners and beneficiaries, while also adding complementary services that deliver against our recently extended charitable aims.

## Opening Up... our support

By 2021 we want to reach 12,900 people each year through our online and telephone support, and through our direct interventions.

## Opening Up... opportunity

128 students with autism will be benefiting from an inspirational, inclusive and student-focused education at our schools in Hassocks and Oxford.

## Opening Up... a caring approach

We will develop a new approach to supporting and caring for older people, providing dignity, hope and respect in later life.

## Opening Up... better futures

We will be supporting 80 young people through educational grants and bursaries to access the educational opportunities at LVS Ascot by 2021.

## Opening Up... potential

By 2021 LVS Ascot will have grown to provide an excellent academic and vocational education to 882 pupils.

## Opening Up... lifelong learning

By 2021 we will have piloted our new all ages educational programme, launching a new trade-based centre of excellence.

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# Thank you

Our work would not be possible without the support of our valuable partners who helped us achieve so much in 2017.



LICENSED  
TRADE  
CHARITY

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