



2023 ANNUAL REPORT

The Social Investment Fund LBG (SIF) was established as a charitable company in April 2020. Its purpose is to use both public and privately donated funds to invest in the third sector and improve joint working between the government and the third sector.

This report focuses on SIF's activities during 2023, in which SIF'S support to the third sector was focused on providing funding through the Small Grants Programme and the Major Grants Programme which together awarded **£1,415,096**.

Since SIF was launched in 2020 and up to the end of 2023, a total of over **£5.8 million** has been distributed, providing vital support to the whole Bailiwick community.

SIF's board comprised of the Very Reverend Tim Barker as Chair, Bethan Haines, Andrew Ozanne OBE, Rachel Copeland BEM, and Steve Wakelin during 2023.

MAJOR GRANTS PROGRAMME

The Major Grants Programme seeks to support the financial sustainability of the Bailiwick's vital charitable sector, targeting funding towards organisations and projects which are most needed or demonstrate measurable benefits for our community.

Charities must demonstrate how they will meet SIF's targeted outcomes:

- Improving the lives of people with specific needs, disadvantages or vulnerabilities
- Employment, education or training opportunities
- The protection of our natural environment, culture and heritage
- Improved health and wellbeing for our community
- An inclusive community, which challenges the barriers causing disadvantage or discrimination



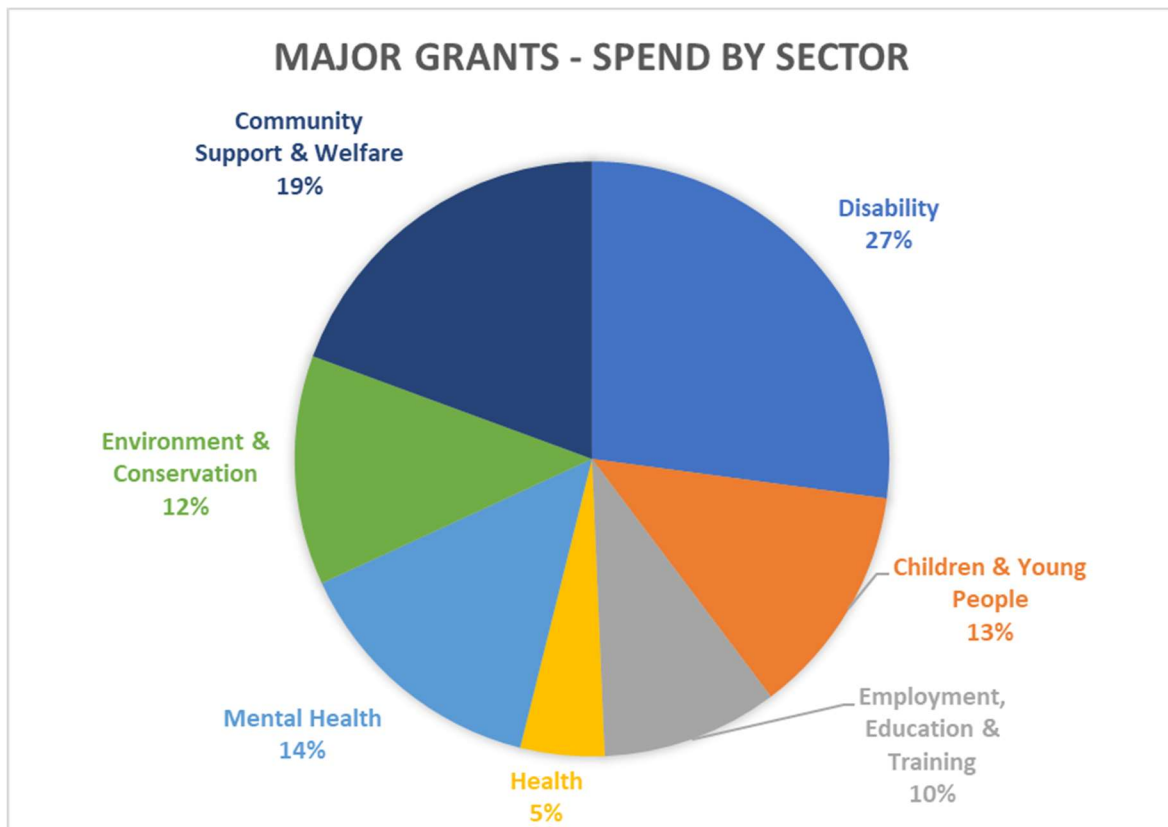
SOCIAL INVESTMENT FUND

Applicants can apply for grants over £25,000 towards running costs and salaries, capital costs or multi-year funding and applicants must be registered charities or NPOs operating within or to benefit the Bailiwick of Guernsey.

Recipients are expected to demonstrate measurable impact against outcomes by proposing appropriate outputs which are then detailed within grant agreements.

There was one round of Major Grants applications held in 2023. Applications were received totalling £1.6 million with 11 organisations awarded funding totalling £1,094,583.

Recipients represent a wide range of focus areas:



The majority of recipients have received multi-year grants to enable the continuation of key services, with some organisations receiving funds to develop, expand or introduce new services, responding to different community needs.

Autism Guernsey received the largest grant, of £233,113, for 3 years funding towards their key occupational therapy service, towards salary costs. The funding also covers the introduction of an adult diagnostic service over three years, which takes place with on-island practitioners. This new service aims to plug a gap in provision for adults who are not considered as learning disabled or do not have a major mental health condition and therefore do not meet the criteria for States adult mental health services.



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Guernsey Alcohol Advisory Service was awarded £50,000 towards the provision of the island's 'dry house' for a year and Vive La Vallette was also awarded £50,000 for one year towards management salary costs, supporting work with community groups.

Grants for community transport services were awarded to Health Connections and the Ron Short Centre (UnLtd) to support running costs. As a result of considering these applications, SIF decided to undertake some research work into the provision of community transport services, so that any future investment in this area can be targeted towards the provision of a potentially integrated and collaborative service (see further details below).

Guernsey Adult Literacy Project has benefited from a 3-year grant of £105,000 towards the salary costs of their two part-time teachers.

Trauma Recovery Centre received £137,971 towards the expansion of the TRC Therapy Centre and services in Guernsey, based at the Rock Church, supporting running costs for 3 years. The service has had long waiting lists with several vulnerable children and their families requiring specialist support. The grant aims to increase provision of services from 5 to 20 clients a week, enabling more families to access specialist trauma recovery focused provision which has not previously been provided on the island.

Alderney Wildlife Trust was awarded £136,5000 towards their 'Alderney State of Nature' work for 3 years, for an Ecologist & Alderney Biodiversity Centre manager; a Lead Marine Ecologist - part-time; ecological training and survey equipment; and IT infrastructure. The grant will substantially increase their capacity to protect Alderney's natural environment by developing a system that informs when biodiversity has been pushed towards a tipping point, providing a warning which then enables targeted, evidence-based, conservation action. The grant will enable the Trust to secure the resources necessary to move from a largely volunteer-run environmental monitoring and engagement programme, to a professional one.

Further 3-year grants were awarded to Guernsey Alzheimer's Association in support of management costs, for £156,000, and to Friends of Citizens Advice which received £111,000 towards shop salary costs and annual rent. Their shop income provides a vital source of funding to Citizens Advice Guernsey, which also benefited from a SIF grant towards management costs for one year, for £30,000. Citizens Advice provides a unique and valuable service to the whole community.

A full schedule of Major Grants awarded in 2023 is attached as Appendix I.



SMALL GRANTS PROGRAMME

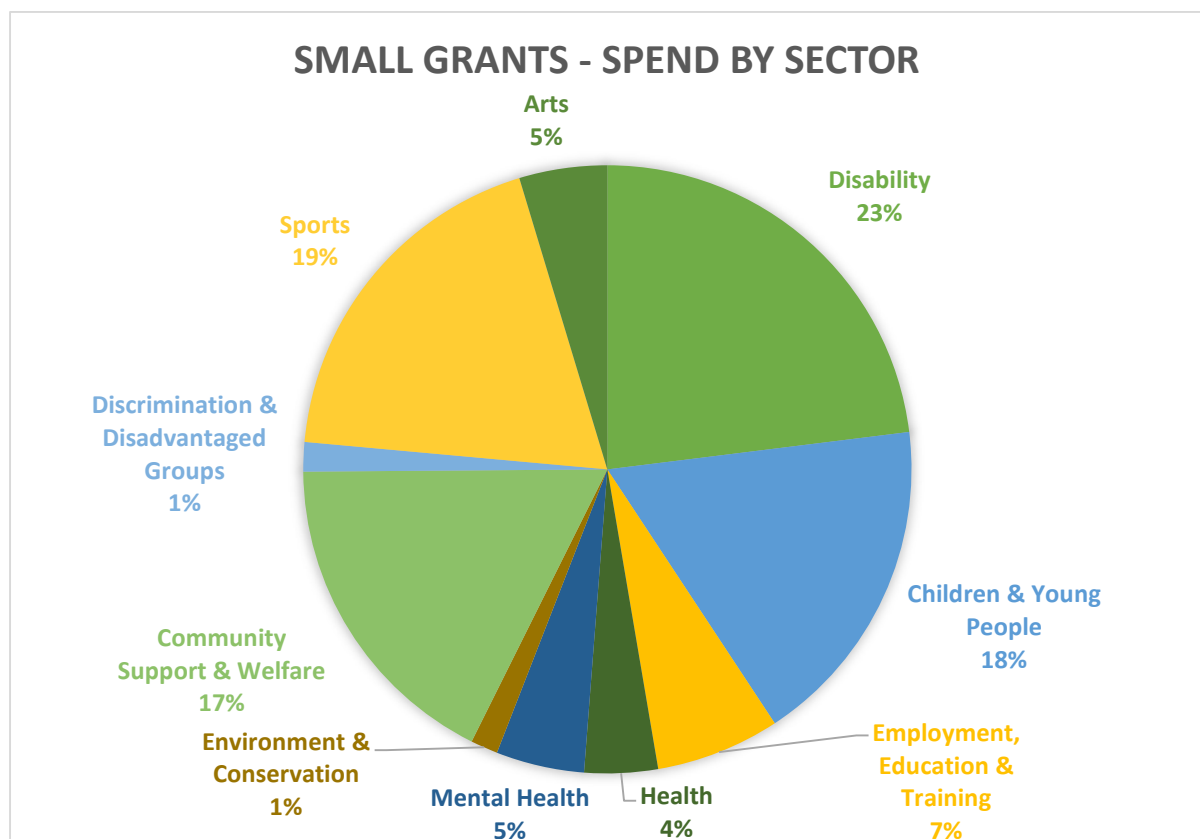
The Small Grants Programme was launched in 2021. Under this Programme, applicants were able to apply for a grant of up to £25,000 for one-off projects, capital expenses, or ongoing expenses, including salaries, of up to a year's duration. In 2023, criteria for small grants were updated so that ongoing salary costs were no longer supported, however, salary costs within projects, usually of up to one year's duration, could be supported.

Applications are open to registered charities or NPOs operating within or to benefit the Bailiwick of Guernsey and need to align with SIF's outcomes, which are the same as those of the Major Grants Programme.

In 2023 £320,513 was donated to 28 different charities and organisations benefiting the Bailiwick, having received 55 applications totalling £837,689. The majority of funds were awarded to Guernsey based charities, with Alderney continuing to benefit from the programme and also Sark charitable organisations.

Guernsey Community Foundation has assisted SIF with the administration of this programme, with SIF making the decisions on funding.

Recipients represent a wide range of beneficiaries and causes:





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Bright Beginnings was awarded £20,000 towards the costs of a new building for a private consulting room, small office and staff room. £24,660 was awarded to Amherst Primary School Parents Teacher Association, towards replacement equipment and essential repairs to the playground equipment. A further substantial grant of £23,910 was awarded to Guernsey Beach Wheelchairs for a new swim chair, new hut, insurance, website hosting, new sign writing on hut, hoist and fitting.

£10,000 was awarded to the Guernsey Eisteddfod for running costs, with £5,000 to the Offender Deposit Assistance Scheme towards lending rental deposits and the Cheshire Home received £12,500 towards utility costs.

£1,450 was awarded to Guernsey Volleyball for running a coaching course to enable players to qualify as coaches, with Guernsey Community Savings receiving £6,960 for premises costs for one year. Sark also benefited from small grants, with La Société Sercquaise being awarded £2,148 for fireproof storage for significant historic documents and the new Sark Art Gallery and Museum was awarded a £5,000 match fund grant towards start-up costs.

Grow Ltd was awarded £7,500 to provide an enrichment programme for the Crew during the period prior to relocation back to the Coutanchez site; £12,500 was given to Guernsey Friends of Maggie's for cancer support specialist time (x250 visits) and property costs; and Guernsey Counselling Service received £15,000 towards costs of supervision, office administration and general running costs for 2023.

Citizens Advice Guernsey received £19,434 towards their IT platform and fees, to enable accurate records to be kept securely and advisors to work effectively from the office or home; Les Voies Parent Teacher Friend Association was awarded £20,196 towards providing school lunches for one school year; and a further substantial grant of £19,075 was awarded to Guernsey Boxing Club towards equipment for ladies' sessions, exhibition shows and essential roof repairs.

Alderney organisations also benefited, with Alderney Broadcasting Company LBG receiving a grant of £10,000 towards replacement software and equipment, and Alderney Bird Observatory being awarded £2,500 towards running costs for one year.

A full schedule of Small Grants awarded in 2023 is attached as Appendix II.



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SIF DEVELOPMENT

SIF's first Chair, Jurat Stephen Jones, retired from the board in April 2023, with Tim Barker, a director since SIF's launch, taking over the role. SIF subsequently recruited for new board members in May 2024, with Brent Homan and Steve Sharman joining the board, and also Stephen Roberts, replacing Steve Wakelin.

Funding for SIF's grants programmes continues to come from the net Guernsey proceeds of the Channel Islands Lottery, the Guernsey Probate Registry and a percentage of the Seized Assets Fund. SIF income will continue to come from these sources until such time as legislation in relation to dormant accounts is finalised and enacted adding further revenues.

SIF continues to host bi-annual meetings of the Grant Givers group, where the Bailiwick's main grant givers meet to discuss funding recipients and criteria, to ensure good coordination, avoid duplicating grants, discuss current trends and any concerns on issues facing the third sector.

SIF also continues to work closely with the Guernsey Community Foundation and the Lloyds Bank Foundation for the Channel Islands to liaise over grant applications and consider co-funding arrangements, where appropriate.

SIF has seen increasing numbers of applications from Alderney and Sark based charitable organisations, so the impact of charitable investments is now being felt across the whole Bailiwick.

2024's criteria for grants programmes are proposed to remain the same as in 2023, providing support across the whole range of charities within the third sector. Feedback from voluntary organisations has shown that SIF's wide criteria is appreciated as it enables the majority of organisations to apply for funding.

SIF is however, starting to undertake work in more focused areas brought to our attention by grant applications, with community transport provision being the first. Several charities are providing community transport services, with the demand for these services increasing, as is the need for further volunteer drivers. In late 2023, the States Commissioning Lead offered to undertake the initial research work in this area, to look at the scope for better coordination amongst third sector providers and with various government services. This work is now underway and stakeholder meetings with several voluntary organisations have taken place. This work continues in 2024 with SIF providing running costs for community transport services run by two charities, the Ron Short Centre (UnLtd) and Health Connections, meanwhile.

In early 2024, SIF is introducing a new funding allocation policy, taking a prudent approach which allows for the allocation of our reserves over a five year term in order to give confidence



and certainty to the Bailiwick's third sector over the sustainability of SIF's grant funding. SIF does not aim to build up our reserves but rather to allocate them sensibly. SIF does not assume anything for future years' receipts of funding to ensure the board is spending within its means.

The amount available for funding to the charitable sector will be calculated each year based on the level of reserves taking into account (a) receipts in the previous year and (b) grants committed in the previous year (whether paid or committed for future years). This ensures that there is always certainty of funding for the sector over a further five years.



Appendix I: 2023 Major Grants Recipients

MAJOR GRANTS PROGRAMME			
	Organisation/ Group	For	Agreed amount
1	Autism Guernsey	Continued Occupational Therapist funding and 2. new adult diagnostic service. Both for 3 years. Full funding as requested for 3 years for OT role: £59,796 x 3= £179,388; Diagnostic service - tapered grant for 3 years - 100% year 1 (£30,700); year 2 50% (£15,350); year 3 to 25% (£7,675) = £53,725	£233,113
2	Guernsey Alzheimer's Association	3 years support for Manager's salary	£156,000
3	Trauma Recovery Centre	Towards expansion of the TRC Therapy Centre and services in Guernsey - support for running costs for 3 years	£137,971
4	Alderney Wildlife Trust	Towards Alderney State of Nature work for 3 years (for an Ecologist & Alderney Biodiversity Centre manager; a Lead Marine Ecologist - part-time; ecological training and survey equipment; and IT infrastructure)	£136,500
5	Friends of Citizens Advice	Towards 3 years' funding of the shop manager's salary and shop rent	£111,000
6	Guernsey Adult Literacy Project	To fund the salaries of the two part-time teachers for 3 years	£105,000
7	Vive La Vallette	Community Lead salary - follow on from current SIF grant - one year funding	£50,000
8	Gsy Alcohol Advisory Service	Dry House Manager (continued funding for 1 year)	£50,000
9	Ron Short Centre	Towards 6 months' funding of current transport service	£31,878
10	Ron Short Centre	A second grant towards a further 6 months' funding of current transport service	£31,878



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11	Citizens Advice Guernsey	Towards the new CEO salary uplift for one year - coincides with SIF's current grant support for the CEO role	£30,000
12	Health Connections	Towards 6 months' funding for transport service- the salaries of 2 current transport co-ordinators	£21,243
TOTAL MAJOR GRANTS FUNDING AWARDED			£1,094,583



Appendix II: 2023 Small Grants Recipients

SMALL GRANTS PROGRAMME 2023			
	Organisation/ Group	For	Agreed amount
1	Amherst PTA	Towards replacement equipment and essential repairs to the playground equipment	£24,660
2	Guernsey Beach Wheelchairs	New swim chair, new hut, insurance, website hosting, new sign writing on hut, hoist and fitting	£23,910
3	Les Voies Parent Teacher Friend Association	Mixed lunches for 20 students over 180 school days (one school year)	£20,196
4	Bright Beginnings	Towards costs of building to house a private consulting room, a small office and a staff room.	£20,000
5	Citizens Advice Guernsey	Towards the creation of individual user and management committee accounts for CAG's IT platform and recurring monthly fees	£19,434
6	Guernsey Sailing Trust	Sailability Programme - For Monday Sailability club costs, sessions and fuel for 3 years	£18,000
7	Guernsey Counselling Service	Towards costs of supervision, office administration and general running costs for 2023	£15,000
8	Alderney Tennis Club	Contribution towards the costs of a padel tennis court	£15,000
9	Guernsey Friends of Maggie's	Towards cancer support specialist time (x250 visits) and property costs	£12,500
10	Cheshire Home	Contribution to utility costs for 2023	£12,500
11	Guernsey Boxing Club	Roof repair and replacement	£12,295
12	Guille-Alles Library	Towards the costs of Book Week for 1 year – author fees, books, prizes, travel and accommodation	£12,000
13	Baubigny Schools PTA	Trampoline, Schools Reading Programme and Music Lessons	£11,200
14	St Saviours Community Centre	Towards costs of roof repairs, new website, new laptop & setup costs, one year maintenance costs, repairs and redecoration to nurse site (unrestricted).	£10,000



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15	Alderney Broadcasting Company LBG	Replacement software and equipment	£10,000
16	Le Rondin School Parents Staff and Friends Association	Contribution towards the Calvert Trust Package Holiday 2024	£10,000
17	Guernsey Eisteddfod	Towards running costs	£10,000
18	Health Connections	Towards office rent and transport software platform costs for 1 year	£9,750
19	Headway Guernsey	Rent for 1 year at KGV	£9,730
20	Grow	Providing an enrichment programme for the Crew during the period prior to relocation back to the Coutanchez site	£7,500
21	Guernsey Community Savings	Costs for premises for 1 year	£6,960
22	Guernsey Boxing Club	Equipment for ladies' sessions and 2 exhibition shows	£6,780
23	The Offender Deposit Assistance Scheme	Towards continuity of service over the next year - providing funding for lending rental deposits.	£5,000
24	Sark Art Gallery and Museum	Match fund grant - towards general start-up costs	£5,000
25	Guernsey Basketball Association	Beau Sejour hire for inter-insular matches, costs of travel for officials, funding towards under 18's programme kit and equipment	£3,500
26	Guernsey Badminton Association	Redecorating £1,500, redecorating changing rooms and shower partitions £2,000	£3,500
27	Alderney Bird Observatory	General donation towards materials; licenses/IT/legal; fuel and transport; rent, rates and insurance	£2,500
28	La Société Sercquaise	Fireproof secure storage for significant historic documents - a Phoenix fire ranger security cabinet and delivery	£2,148
29	Guernsey Volleyball	Running a coaching course to enable players to qualify as coaches	£1,450
TOTAL SMALL GRANTS FUNDING AWARDED			£320,513
TOTAL FUNDING AWARDED SMALL & MAJOR GRANTS			£1,415,096