



Jersey
Community
Foundation

Local Needs Assessment
Jersey

Executive Summary

Written to accompany the full report findings, commissioned by Jersey Community Foundation in Dec 2022, published Jan 2023 and independently authored.



RESEARCH APPROACH

30

We held over 30 meetings with representatives from the community sector

1,058

We ran a public survey which attracted more than 1,058 respondents.

7

We undertook a comparison of Jersey to its international peers across seven social themes

INTRODUCTION

WHY IS THIS ASSESSMENT OF JERSEY'S NEED SO IMPORTANT?

The understanding of local needs, provided by this report, is needed now more than ever before as Jersey enters what is likely to be a prolonged period of socio-economic difficulties.

Jersey Community Foundation's (JCF) vision is to connect people who care with causes that matter. This vision is underpinned by our mission to be a trusted and effective grant giver; to provide a platform for philanthropy; and to address difficult issues by providing leadership. To do this well, it is increasingly important to take a structured and open approach to providing grants and to monitoring their impact.

This Local Needs Assessment will help inform how JCF prioritises its limited resources, providing the backbone for their planned funding strategy and the performance framework that will sit around it. By measuring these social themes, they will be able to better inform donors of issues and opportunities in Jersey, helping to set priorities.

THIS RESEARCH WILL PROVIDE A BASELINE FROM WHICH JCF CAN:

1.

better target and allocate funding to address the needs of the Island

2.

assess progress over time

3.

build a stronger story around impact of JCF and its grant-making

APPROACH TO ANALYSIS

IN ORDER TO DELIVER A JERSEY NEEDS ASSESSMENT, WE FOLLOWED A STEP-BY-STEP APPROACH BASED AROUND A THREE-PHASE FRAMEWORK. THIS IS OUTLINED BELOW:

PHASE 1


Included the baseline study where Jersey is benchmarked internationally, using OECD data, to derive an initial data-driven score against each of the seven social themes. Limitations around Jersey data availability and international consistency constrained the number of data points that could be included in the benchmark exercise.

PHASE 2

Included extensive engagement with stakeholders across all social themes to identify key challenges facing Jersey, as well as data gaps. Interviews and 1-2-1 sessions were held with more than 30 individual stakeholders. It is important to note that much of this study is based on perceived and relative needs expressed by stakeholders and the community.

PHASE 3:

Aimed to achieve consensus on each of the social theme needs, causes and solutions in the form of a public survey. The survey was active for approximately 5 weeks and collected 1058 total responses, achieving a statistically significant sample of the Islands population. After concluding the survey, we reworked the benchmark score for each social theme as well as an outlook score.

Demographics	103,000	52%	20%
	Population of the Island	Dependency ratio in 2021	Non-British or non-Jersey born population

JERSEY'S LOCAL NEEDS ASSESSMENT THEMES, DEFINITIONS AND RESULTS AT A GLANCE

Housing & Homelessness	Current: C	Outlook: D	Resilience Where access to safe, affordable, good quality housing underpins a vibrant community with a sense of security and stability.
Good Health & Social Care	Current: C	Outlook: C	Vitality Where a combination of physical, social, intellectual and emotional factors contributes to the overall health & wellbeing of the community, driving the awareness and prioritisation of healthy lifestyle choices.
Community Safety	Current: A	Outlook: B	Secure Sheltered by a network of rehabilitative, preventative, and responses emergencies services, Islanders feel safe and secure to go about their daily lives.
Fairness	Current: C	Outlook: D	Accessibility Where fairness or social equity ensures that everyone has a share in the Island's economic success and an equal opportunity to lead healthy and productive lives.
Strong Community Wellbeing	Current: D	Outlook: C	Participation A community with a sense of belonging, trust and inclusion where all Islanders, no matter their backgrounds, actively participate in building relationships that respect community and individual values.
Learning & Education	Current: D	Outlook: D	Outcomes Where education & learning plays an important role in promoting creativity, potential and vitality of our island to underpin a thriving economy.
Culture, Arts & Heritage	Current: D	Outlook: C	Engagement Where wellbeing is underpinned by a culture of creativity that enables a healthy, inclusive and happy population, and enriching environment with a productive and balanced economy.

Legend

- A - Excellent
- B - Good
- C - Average
- D - Below average
- F - Failure



1. HOUSING AND HOMELESSNESS

BASIC NEED

CURRENT: C OUTLOOK: B

Third sector & Government organisations in Jersey are aiding the Island's housing challenges through:

- **The Affordable Housing Gateway;**
- **Socially rented housing;**
- **Shelter and emergency accommodation; and**
- **Counselling and advice.**

In recent years, these efforts by third sector organisations have increased, with a rising number of social housing and shelter accommodation units. The six main emergency shelter providers in Jersey can now accommodate more than 219 people (up from 177 last year). Despite this, demand for housing and emergency accommodation is outstripping the pace at which suppliers can increase provision.

AFFORDABILITY

£735,000

The average cost of a three bedroom house in 2021

Issues with housing supply have driven significant property price increases over the past decade, causing affordability issues for many Islanders.

40%

of islanders saved nothing or under 2.5% of their monthly income in 2022

For some, the impact of these cost pressures is, in part, driving them into homelessness. It is clear from our discussions with third sector leaders that there has also been a significant increase in demand for basic universal needs, such as food banks and shelter accommodation – particularly by younger Islanders and those in full-time work. Demand for which has, in part, been driven by the pandemic.

HOMELESSNESS

Our findings suggest that much of Jersey's roofless and houseless challenge stems from:

- shortcomings in our foster care system;
- as a consequence of domestic abuse;
- or as a result of mental health and addiction problems.

Those transitioning from sheltered accommodation into independent accommodation face barriers - most notably those without residential rights (e.g. additional hurdles to finding employment and housing).

The presence of complex multiple needs such as mental health and substance abuse issues can cause disruption when rehabilitated clients move back into independent housing.

100+

Islanders were roofless or houseless at any one time in 2022

13,500

Number of Islanders living in social housing

2. GOOD HEALTH & SOCIAL CARE

BASIC NEED

CURRENT: C OUTLOOK: C

ROLE OF THIRD SECTOR

The public sector funds secondary and tertiary care and subsidized primary / social care, which is complemented by third sector organisations. In total, some 75+ charities support Islanders with disability and physical / mental health conditions. Sitting above this is the Jersey Care Commission which has responsibility for overseeing the quality of care.

Support by third sector organisations span all facets of Islanders' health and social care needs, in particular playing a crucial role in delivering preventive and rehabilitative care.

40%

of respondents reported high or severe levels of anxiety

TOP CHALLENGES

The survey's qualitative research tells us that service delivery is struggling to keep pace with changing community needs, leading to people falling through the gaps. Stakeholders identified that the effects of these structural challenges have resulted in:

- **Under investment in care infrastructure;**
- **Many Islanders are struggling with mental health issues and there are examples where this has resulted in substance abuse;**
- **Growing obesity and associated health challenges;**
- **Age related diseases, such as dementia;**
- **Primary care being delivered in isolation to secondary, tertiary and third sector care;**
- **Infrastructure unable to meet the care needs of children on the Child Protection Register;**
- **A significant staffing shortfall, with over 400 vacancies in the health services alone (Health turns to UK and India to fill 400 roles, 2022).**

INCOME INEQUALITY

53%

of those surveyed on low income were likely to delay seeing a GP due to affordability in 2022

Lifestyle diseases are creating new burdens on the third sector and wider health and social care services. These are often caused by a lack of physical activity, unhealthy eating, and substance use, which is causing an increase in heart disease, stroke, obesity, diabetes and cancer to name a few. Some of these health and social care challenges are made worse by existing income and wealth inequalities in Jersey. Government research quoted in the report found a higher proportion of children attending non-fee paying schools were overweight or obese.

Further to this is a growing mental health endemic which is affecting Islanders across all age groups. The challenge posed by poor mental health is underscored by Islanders' level of anxiety. **Almost 40% of respondents self-reported high or severe levels of anxiety;** compared to just 4% who self-reported having no anxiety. Overall, the mean score out of 5 for anxiety was 2.3.

3. COMMUNITY SAFETY

BASIC NEED

CURRENT: A OUTLOOK: B

ROLE OF THIRD SECTOR

The Island is unique in the way that community safety is maintained, with a large emphasis on voluntary work by the Honorary Police - who act as the gatekeepers to the criminal justice system.

Working alongside the Government are a number of third sector organisations which broadly fall into one of three areas; prevention, rehabilitation, and response. These organisations play a crucial role in the Island's community safety infrastructure - making the Island the safe place it is.

£110,000 +

spent on police officers attending mental health incidents in 2021

+28%

increase in mental health incidents in year to November 2022

TOP CHALLENGES

GAPS IN JERSEY LAW

Stakeholders cited issues with the recent domestic abuse law (does not explicitly call out economic abuse), the lack of prevention orders (long available in the UK) and lack of specific laws that protect elderly from neglect as barriers to their role of ensuring community safety.

Jersey's Police service finds itself increasingly spending much of their time delivering social and health services in areas where other agencies have either stepped back or can't keep up with demand. Mental health issues are emerging as a major driver of the increase in Police incidents (up 28% year to date), which highlights gaps in the Island's community safety infrastructure.

Anecdotal evidence suggests that domestic abuse is particularly under-reported - with evidence that domestic abuse cases are typically not reported until 5 years after the first incident occurs. As a result, it is estimated that 500 children per year are exposed to domestic abuse, and these are mostly repeat cases.

Anti-social behaviour is largely the same in 2021 as it was in 2019; but did decrease by 17% for 2021 vs 2020. Sexual offences decreased from 211 in 2019 to 175 in 2021 (36%) but increased by 31% from 2020 to 2021 (Police Annual Report, 2021).

YOUTH CRIME

8 of the 10

repeat offenders in 2021 were under the age of 18

£1m+

total cost of 824 missing youths to the States of Jersey Police in 2021

4. FAIRNESS

BASIC NEED

CURRENT: C OUTLOOK: D

ROLE OF THIRD SECTOR

The success of our community is grounded in having the conditions for families and individuals to lead fulfilling lives. Many third sector organisations across all fields of work play an active role in addressing social inequalities in Jersey.

These organisations do this through either preventative or responsive activities. These activities usually fall into one of five areas, namely:

1. Emergency financial support and inclusion;
2. Advocacy, outreach, and advice;
3. Training and employment;
4. Housing; or
5. Caregiving and welfare

53%

of islanders are having difficulties meeting their living costs

61%

of respondents self-reported that they would find it 'Somewhat difficult' or 'Very difficult' to pay an unexpected bill of £400.

TOP CHALLENGES

The largest challenges facing perceived, relative, and absolute fairness in Jersey fall into three areas, namely:

- Housing affordability (explored in theme 1);
- Unequal employment opportunities;
- Education outcomes.

Many of these challenges stem from existing housing and work legislation which leave a significant share of Islanders without equal access to housing and employment opportunities. The effects of which span all facets of society but are worst felt by those on low incomes. Throughout our research, we heard accounts of how these rules were affecting families, forcing unhealthy dependencies, and impeding Islanders' aspirations to move out of relative poverty.

Many issues related to accessibility and fairness continue to worsen - by one measure the Citizens Advice Bureau alone has seen an increase in enquiries of over 100% in less than a year.

£28,600

vs

£73,400

The bottom quintile (20%) of households by annual income is approximately £28,600 compared with £73,400 for the fourth quintile.

EMPLOYMENT OPPORTUNITIES

The existing housing and work laws are particularly prohibitive to those moving to Jersey (for non-Entitled). They cause social divisions and unfairly lead to some Islanders being over skilled for the jobs available to them.

EDUCATION OUTCOMES

Average salary (mean) of those who studied at a fee-paying school is almost 30% higher than those who studied at a non-fee-paying state school.

5. STRONG COMMUNITY WELLBEING

BASIC NEED

CURRENT: D OUTLOOK: C

ROLE OF THIRD SECTOR

The role of the third sector in supporting the Island's community wellbeing is broad - effectively being a by-product of almost everything they do. These organisations deliver a stronger community and individual wellbeing by providing representation to those who need it; by improving learning outcomes; creating forums for stronger community connections; and by meeting Islanders' wellbeing needs through advice and counselling to name a few.

52%

The Islands dependency ratio in 2021, which has risen from 48% in 2011

TOP CHALLENGES

The largest challenges facing perceived and relative community wellbeing in Jersey fall into three areas, namely:

- Wellbeing inequalities;
- Exclusion & isolation;
- Mental health needs are not being recognised in the services offered.

None of these challenges should be seen in isolation, but rather as a symbiotic relationship where changes in one affects the others.

The inequalities in Islanders' wellbeing is mainly driven by differences in income and education. Our findings suggest that as Islanders' income increased, so too did their feelings of happiness, worthwhileness, and life satisfaction. Similarly, their levels of anxiety and experiences of discrimination also decreased.

These challenges are made worse by increasingly recognised levels of exclusion and isolation. Mind Jersey, the Island's principal mental health charity, estimates that they only reach 40% of Islanders who need support. Those who are least represented in the Island's social safety net appear to be the Island's minorities, whether ethnic or those in the LGBTQ+ community.

Only 15.21% of respondents felt that multiculturalism is good for the Island

Voter turnout in Jersey is among the lowest of any European electorate

3.5 vs 3.2

The average wellbeing score out of five of Islanders on high and low incomes respectively

2.3/5

the self-rated average anxiety score, in 2022

Self rated wellbeing scores

	Mean score
Worthwhileness	3.5 out of 5
Happiness	3.6 out of 5
Life satisfaction	3.4 out of 5

3.1/5

score given to the strength of Jersey's community.

6. LEARNING & EDUCATION

BASIC NEED

CURRENT: D OUTLOOK: D

ROLE OF THIRD SECTOR

Not-for-profit organisations in Jersey play a crucial role in levelling the playing field for young people, irrespective of their background.

Of the 44 providers of primary, secondary, and higher education, 17 are third sector organisations. This network of education providers is complemented by dozens of charities that deliver youth clubs, school endowment funds, child welfare support, learning disabilities and difficulties support, and youth organisations. In total, of the almost 450 registered charities with the Jersey Charity Commissioner (JCC), more than 50 are dedicated to education, children, and young people, which by extension support parents and families

24.2%

of local students on pupil premium (2020)

TOP CHALLENGES

For Islanders to meet their full learning and education potential, it is important that basic universal needs are met, such as good housing, health, safety, fairness, and wellbeing. For this reason, the biggest challenges that the Island faces in terms of learning and education follow the learning journey of Islanders from early years into adulthood. Findings suggest that the greatest challenges fall into three areas, namely:

- Health & wellbeing;
- Outcome inequalities;
- Reskilling opportunities and participation.

	Fee paying	Non-fee paying
Survey split ²²	42.0%	58.0%
Higher education achieved ²³	59.5%	37.8%
Mean salary ²⁴	£56,000	£44,200
Life satisfaction ²⁵	3.6 out of 5	3.2 out of 5

RESKILLING

We will see significant disruption to the Island's workforce and economy in the coming years due to the technology revolution and green transition. This will place increased pressures on Islanders to reskill and upskill.

HEALTH & WELLBEING

There are a growing number of students who are overweight or obese. Evidence suggests that moderate to vigorous physical activity positively influences academic performance. There is also a divide in health between fee and non-fee-paying students; with 27% of 4 to 5-year-olds attending non-fee-paying schools being overweight or obese, compared with 19% who attended fee paying schools

OUTCOME INEQUALITIES

There is a split between fee paying vs non-fee-paying students' intentions to pursue further/higher education - with 72% of fee-paying students planning to enroll on further/higher education courses compared with 60% of non-fee-paying students. This divide further embeds the social mobility issues we see in the workforce.

7. CULTURE, ARTS & HERITAGE

BASIC NEED

CURRENT: D OUTLOOK: C

ROLE OF THIRD SECTOR

There are approx. 70 charities and numerous community groups and social enterprises which provide the bedrock for the Island's Culture, Arts & Heritage (CAH) community.

These include organisations which cultivate creativity, like Art in the Frame Foundation, Jersey Eisteddfod, and Jersey Festival Choir. They also include charities which build familiarity and connectivity internationally, like Alliance Française de Jersey. Anchor organisations that support our heritage, culture and natural environment, such as National Trust for Jersey, Jersey Trees for Life, and Jersey Heritage play a key role in supporting the Island's CAH landscape. There are a growing number of charities supporting social prescribing, such as Kairos Arts organisation that seeks to utilise arts and culture activities for the benefit of Islanders' mental health.

29%

of Islanders self-reported that CAH affordability was a barrier

45%

of 16-34 year old survey respondents felt bored always or often compared to a fifth of people aged 65 or over

TOP CHALLENGES

Findings suggest that the greatest issues the Island's CAH community face fall into three areas, namely:

- Low levels of participation;
- Unequal access;
- A legacy of underinvestment.

UNEQUAL ACCESS

The results suggests that those on low incomes are underrepresented in the CAH community with 10% of low-income respondents not participating in any CAH activities on Island, compared with 4% of high-income respondents.

LEVELS OF PARTICIPATION

Engagement and participation in the Island's CAH community is relatively low and unevenly spread depending on the type of CAH activity that is being considered.

Of survey respondents, only 9% had not engaged in any on Island CAH activities. When asked why Islanders do not engage in CAH activities, 25% attributed it to cost, with a further 25% attributing it to the Island's limited local offering.

UNDERINVESTMENT

There has been a legacy of underinvestment in the Island's CAH sector that is starting to show. The Opera House has remained closed since the pandemic, and Fort Regent is set for closure, meaning that facilities are significantly reduced. Similarly, Elizabeth Castle, the Island's most visited heritage site, is in need of significant restoration.

The Government's commitment to devoting 1% of public revenue on the Arts is a positive step in this regard.

About JCF

With the incredible support of our donors, JCF is approaching £5m of grants awarded since our establishment in 2020. We are so grateful to everyone who has supported us and been inspired to help.

Our Local Needs Assessment Report has shone a bright light on the inequalities and huge disadvantages that some of the most vulnerable face in our Island.

We are determined to inspire the support of people, businesses and organisations that can help overcome these impacts. There is enormous success and prosperity in Jersey. We want to capitalise upon these resources to provide funding for local community projects that make a real, positive difference. Through your support, we can do more to empower communities to create the best methods of helping people who are less fortunate.

Independent

We are an independent grant making charity dedicated to meeting the needs of our local community. We work with charities, voluntary organisations and individuals to enable positive change in the lives of thousands of people on our Island.



Partnerships

We work in partnership with our donors to provide an expert service. We ensure their giving goes to worthwhile causes in the areas they are passionate about, whether that be supporting older people, those with disabilities, helping young people with education and training, local sporting projects, heritage, arts and culture or the environment.

Impact driven

We strive to make the experience of giving as smooth and as impactful as possible, for both the donor and recipient charities. Through research and by engaging specialist advisers, we ensure that positive, measurable outcomes are embedded in our grant-giving process.

Local Expertise

We employ a small team of professional staff who support our Board of Directors in developing our supporter base, making grants, researching the local needs, and ensuring the proper financial administration of the Foundation.

How you can help

THERE ARE SEVERAL WAYS YOU CAN SUPPORT US:

Donor Advised Funds

For long-term community impact, individuals and corporate partners can set up a Donor Advised Fund with JCF. Your fund is ring-fenced to benefit causes important to you.

You make a donation to your fund which is immediately available for awarding grants to local projects. Our team will work with you to understand your passion and aims, and will then put forward grant applications for your consideration on a regular basis.

Themed Funds

Themed funds are an alternative option to a Donor Advised Fund, supported by one-off or regular gifts from a number of donors who share a common interest. Together, these funds allow the Foundation to respond to urgent community needs and to emerging opportunities for projects, programs, and services across a broad range of charitable organisations.

Donations

Offering one off sums or regular smaller amounts is of great help to JCF.

If you would like more information about donating to JCF please contact our CEO Anna Terry to arrange a confidential no obligation conversation: anna@jerseycommunityfoundation.org

**DONATE
TODAY**

As a Registered Charity we can increase the value of your gift by 25% if you are able to donate under the "Jersey Gift Support" scheme.

Account name: The Jersey Community Foundation Limited - Donor Account
Sort code: 40-25-33
Account number: 31896032