Q&A Session with Jonathan Simmons



Following Jonathan Simmons' keynote address at the AGC Annual Conference, delegates explored a wide range of issues affecting charities, philanthropy, collaboration and the future of the sector. The discussion ranged from faith-based funding and charity mergers to tax incentives, political advocacy and the role of philanthropy in driving social change.

Faith Groups and Access to Funding

The Dean of Guernsey highlighted the significant social impact delivered through church-led services, particularly parent and toddler groups, early years support and community connections. Despite this contribution, faith organisations can find it difficult to attract funding because of exclusions relating to religious affiliation.

Jonathan acknowledged this challenge and argued that he could think of "no better example of the impact economy than the church". He pointed to the Church's extensive property holdings, deep local roots, broad volunteer base and substantial endowments as powerful examples of community assets being deployed for social good.

He also highlighted a growing challenge for charities generally: increasing scrutiny of endowments and investment portfolios. Funders, he suggested, are beginning to ask difficult questions about whether charitable investments are aligned with charitable purposes.

"Why am I giving you money to solve this problem when you're investing over here in something that may be creating that problem?"

Jonathan further argued that faith exclusion is a genuine issue and noted that he had participated in place-based policy discussions where religious organisations had not been mentioned at all, despite the significant role many churches and faith communities play in delivering local services and supporting vulnerable people.

Philanthropy, Trust and Charity Independence

Delegates discussed the balance between a philanthropist's desire to understand how their funding is used and a charity's need to maintain operational independence.

Jonathan was clear that NPC supports unrestricted, trust-based philanthropy. He drew a distinction between asking legitimate questions about impact and becoming involved in the operational management of a charity.

He suggested that philanthropists should undertake appropriate due diligence before making a gift but then trust charities to do their jobs. While donors have every right to understand outcomes, they should not seek to direct day-to-day activities or organisational priorities.

He also acknowledged the difficult conversations this can involve, particularly where major donors become closely involved with organisations they support.

Do Charities Naturally Evolve?

One of the most interesting discussions centred on whether charities evolve in the same way as organisations in other sectors.

Jonathan stressed that he was not suggesting charities have a "sell-by date". However, he challenged delegates to compare charities with sectors such as retail, leisure or finance, where the leading organisations often change significantly over time.

He noted that if you compare the top organisations in many commercial sectors between 1990 and today, a large proportion will have changed. In contrast, charities often appear remarkably stable.

His question was not whether charities should fail, but whether the sector pays enough attention to relevance, adaptation and changing social needs. If an organisation was founded in the cultural context of 1987, is it necessarily operating in the best way to address challenges in 2026?

He used changes in how young people access information as an example. Teachers were once consistently viewed as the most trusted source of information for young people. Today, they often do not feature among the top answers. Such changes, he argued, should encourage charities to continually question whether their models remain fit for purpose.

Jonathan suggested the sector should become more comfortable discussing mergers, closures, transitions and the transfer of expertise. In some circumstances, a charity completing its mission and passing knowledge to others should be viewed positively rather than being seen as a failure.

Collaboration and Charity Mergers

Building on those comments, delegates asked how charities could be encouraged to collaborate more effectively and, where appropriate, merge.

Jonathan was clear that merger discussions should not be driven by philanthropists making funding conditional upon organisational change. The decision must belong to the organisations themselves.

Instead, he argued that successful mergers are much more likely to emerge from collaboration. Organisations that know each other, trust each other and already work together are far better positioned to consider formal partnerships than those brought together artificially.

A key concern for him was that funding systems frequently encourage competition. He described a familiar scenario where a funder issues an open call for applications around a particular issue, unintentionally creating competition among organisations that share the same objectives.

His alternative approach was to bring organisations together earlier in the process, fund collaborative discussions and provide development money that allows charities to explore solutions jointly before grants are allocated.

Jonathan noted that merger discussions are becoming increasingly prominent among major funders and observed that leaders within the Lloyds Bank Foundation movement have been speaking publicly about the issue with increasing frequency.

Storytelling, Transparency and Staying Relevant

When asked how long-established charities can maintain relevance, Jonathan argued that the answer is not necessarily to change names or logos.

Instead, charities should continually tell a current and compelling story about who they are, why they exist and the impact they are having. Organisations that regularly demonstrate their outcomes and openly communicate about their work are more likely to remain relevant and trusted.

He argued that transparency should apply not only to funders but also to charities themselves. An organisation that continually evaluates and demonstrates its impact is more likely to recognise when change may be needed.

He also acknowledged that there are important exceptions, particularly organisations working in areas such as domestic abuse, where visibility and openness are often constrained by safeguarding and privacy considerations.

Supporting Smaller and Less Fashionable Causes

Delegates asked how smaller charities and organisations working on less fashionable issues can attract support in an increasingly crowded funding environment.

Jonathan was candid about the challenge. Funding priorities often follow social trends, public attention and media focus, making it difficult for less visible causes to compete.

He cited migrant and refugee charities as examples of organisations facing particularly difficult operating environments and acknowledged that leaders in such fields may sometimes face personal criticism or hostility because of their work.

Importantly, he agreed that infrastructure bodies and umbrella organisations have a role in identifying impactful but overlooked work and helping to raise its profile.

Philanthropy, Tax Incentives and Giving

The discussion then turned to whether Guernsey's tax environment could encourage greater philanthropy, particularly among high-net-worth individuals.

Jonathan highlighted the importance of benchmarking charitable giving. Having robust data allows informed conversations about generosity and civic responsibility rather than relying solely on perceptions. He noted that many wealthy individuals regard themselves as generous, but that assessment is difficult without meaningful points of comparison.

However, he cautioned against assuming that tax incentives are the primary driver of philanthropy.

While tax policy may influence advisers and financial planning structures, he argued that there is little evidence that favourable tax treatment alone explains philanthropic behaviour. In particular, he challenged the common assumption that the strength of American philanthropy is primarily a tax phenomenon.

Instead, he suggested that culture, social expectations, civic responsibility and traditions of community leadership are likely to be more influential drivers of giving.

Charities, Advocacy and Political Change

The conversation also explored charities that seek policy reform and social change.

Jonathan noted that philanthropy absolutely does support causes with political dimensions. He pointed to significant philanthropic funding within wider political movements and emphasised that philanthropic capital can be highly influential in shaping public debate and societal change.

At the same time, he recognised that charities must operate within legal and regulatory boundaries regarding political activity and campaigning.

He also encouraged delegates to think more broadly about where philanthropic decisions are made. Increasingly, the largest sources of giving are not isolated individuals acting alone. Research cited during the discussion suggested that around three quarters of resources entering the wider impact economy come through businesses rather than individuals.

Jonathan further highlighted the impact of intergenerational wealth transfer, noting that philanthropic decision-making is increasingly being shaped by educated women. He referenced figures such as Laurene Powell Jobs and Melinda Gates as examples of individuals who have significantly reshaped philanthropic priorities and approaches.

Ultimately, however, he argued that most charities are not trying to persuade people to care about entirely new causes. The challenge is usually identifying and engaging those whose existing interests already align with the charity's mission.

Social Return on Investment and Measuring Impact

The final discussion focused on Social Return on Investment (SROI) and outcome-based funding approaches.

Jonathan observed that outcome measurement is now widely used in investment and government settings and continues to grow in importance. Philanthropy, however, has generally adopted these approaches more slowly.

While he recognised the value of understanding long-term outcomes and measuring social return, he cautioned against imposing excessive rigidity on philanthropic capital.

One of the unique strengths of philanthropy, he argued, is its ability to take risks, explore new approaches and support initiatives where outcomes may not yet be fully predictable. Overly strict measurement frameworks can sometimes undermine that flexibility.

A Final Reflection on Power

In his closing remarks, Jonathan returned to what he described as perhaps the most important theme raised during the session: power.

Every time funding organisations ask charities for information, evidence, outcomes or accountability, they inevitably influence the relationship. Equally, funders should not be prevented from asking legitimate questions for fear of being perceived as interfering.

The challenge, he suggested, is finding the right balance between accountability and trust.

He concluded by encouraging charities, trustees and funders to discuss these issues openly. If boards are not actively discussing power, influence, trust and accountability, then important conversations are being missed.

Key Takeaways

- Jonathan described faith organisations as among the strongest examples of the impact economy in practice.
- Trust-based philanthropy requires accountability without operational interference.
- Charities should continually assess their relevance, impact and ability to adapt.
- Collaboration is often a necessary precursor to successful merger discussions.
- Competition created by funding systems can sometimes work against collective problem-solving.
- Storytelling, transparency and impact reporting are critical to remaining relevant.
- Tax incentives alone do not appear to explain philanthropic behaviour.
- Businesses and family decision-makers play an increasingly significant role in modern philanthropy.
- Philanthropy's unique value lies partly in its ability to take risks and support innovation.

- Questions of power, trust and accountability remain central to effective relationships between funders and charities.

A curated text of Jonathan's Q and A session at the AGC's Financial Sustainability, Thinking Different conference on 17th October 2026, Guernsey.