

## Social investments made by investors into charities and social enterprises

### INVESTMENTS MADE

at 30<sup>th</sup> Jun 2019 - totalling **£21m**



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Of the **335** investments made into charities and social enterprises by the social investors to date...

**£63k**

Average investment

**48 months**

Average loan term

**5 FTE**

Median investee employees

**7.34%**

Average interest rate

**£223k**

Median turnover of recipients

**58%**

Loan recipients also received a Growth Fund grant

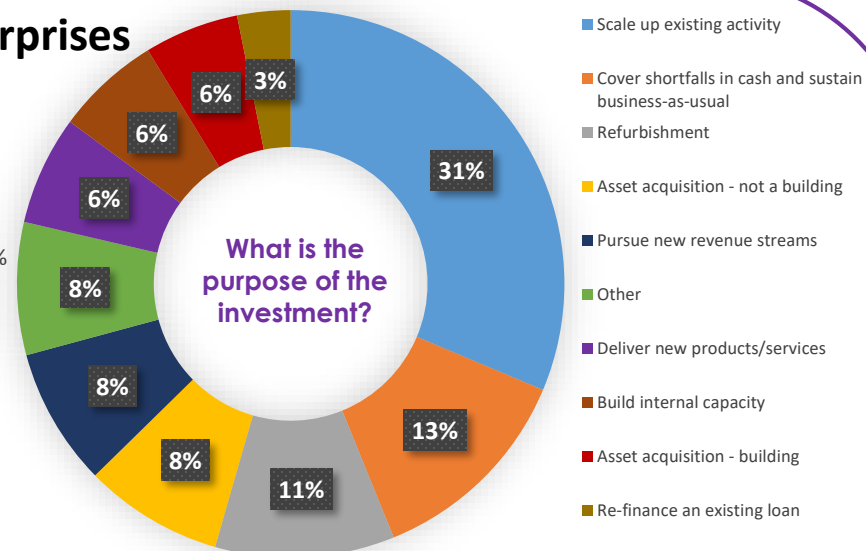
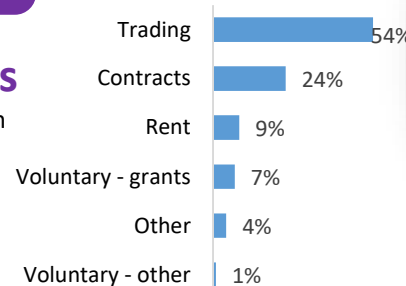
**29%**

Borrowers that received Reach Fund or other capacity building support

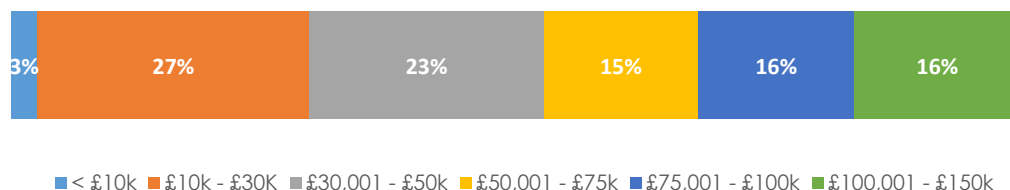
**13%**

Of total investment given as grant

### What is the primary source of income of investees?

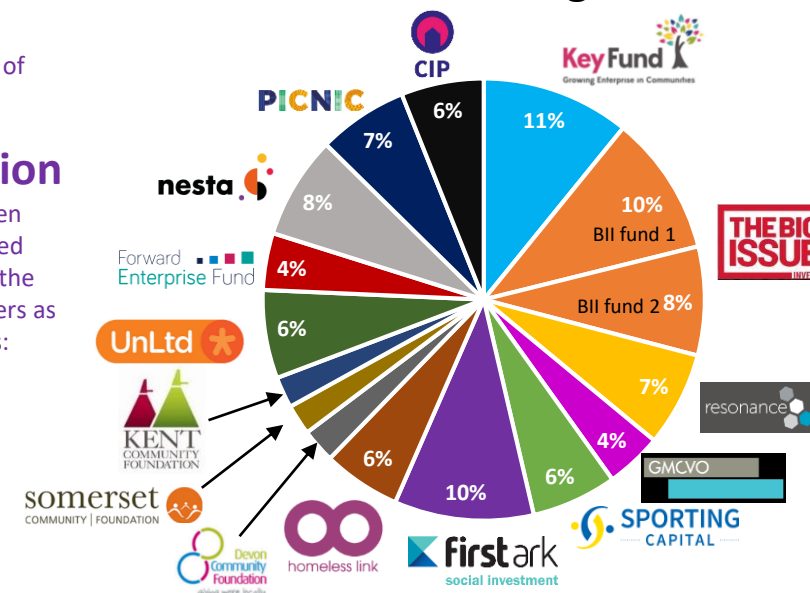


### What is the spread of investment size?



## The social investors delivering the Growth Fund

A total of **£47 million** has been allocated across the providers as follows:



# Quarterly Dashboard to 30 June 2019: CAPACITY BUILDING



Investment readiness grants for charities & social enterprises via social investor 'Access Points'

**376**

Grants awarded to date

**£5.3m**

Grants awarded to date

**£14k**

Average Grant size

**£922k**

Grants awarded this quarter

**29**

Social investor 'Access Points'

For more information see [reachfund.org.uk](http://reachfund.org.uk)



[CLICK HERE to view interactive map](#)



**Enterprise Development Programme**

Helping charities and social enterprises transition to new enterprise models or grow existing ones.

**78**

Feasibility Grants awarded to date

**33 Homeless 45 Youth**

**£7.6k**

Average feasibility grant size

**40**

Enterprise Learning places awarded

**20 Homeless 20 Youth**

**24**

Development Grants awarded to date

**10 Homeless 14 Youth**

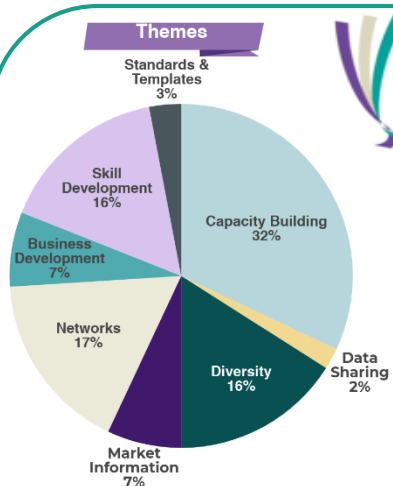
**£34.8k**

Average development grant size



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For more information see [sibgroup.org.uk/enterprise-development-programme](http://sibgroup.org.uk/enterprise-development-programme)



**Connect Fund** Building a better social investment market

**£2.2m** has been awarded so far

**1** investment & **54** grants have been made across eight themes



Unlocked additional **£500K** from other funders



**2,130 VCSEs** reached directly



Almost **4,000 hours** of enterprise development support delivered to VCSEs



**94 conferences or events** held



**241 new networks, collaborations or partnerships**

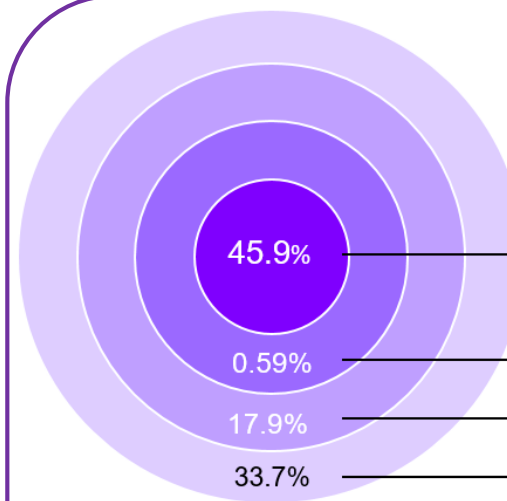
In an evaluation conducted of Connect Fund grantees **79%** of them "agree that there is more support available for VCSEs considering social investment than 18 months ago"

Strengthening the social investment market to better meet the needs of VCSEs - <http://www.connectfund.org.uk>

[CLICK HERE to view interactive map](#)

## OUR ENDOWMENT

Invested under our 'total impact' approach whilst being spent down to fund these programmes



**45.9%**

**[Tier 1]**

Charities and social enterprises delivering social impact in the UK

**0.59%**

**[Tier 2]**

Charities and social enterprises delivering social impact elsewhere

**17.9%**

**[Tier 3]**

Other organisations delivering social impact

**33.7%**

**[Tier 4]**

Other organisations that have best in class ESG indicators (priority on S&G)

**1.9%**

Cash Read more about our total impact investment approach [here](#)

Portfolio investments at 30<sup>th</sup> June 2019