

Social investments made by investors into charities and social enterprises

Of the **388** investments made into charities and social enterprises by the social investors to date...

£63k
Average investment

49 months
Average loan term

5 FTE
Median investee employees

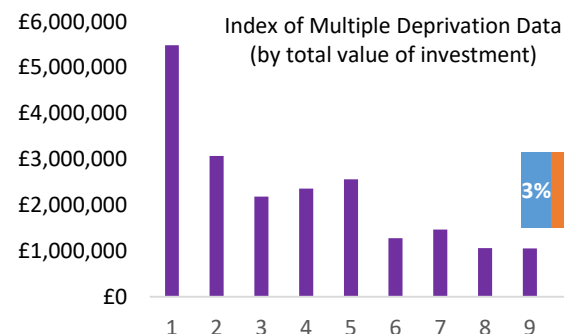
7.32%
Average interest rate

£224k
Median turnover of recipients

58%
Loan recipients also received a Growth Fund grant

28%
Borrowers that received Reach Fund or other capacity building support

12%
Of total investment given as grant

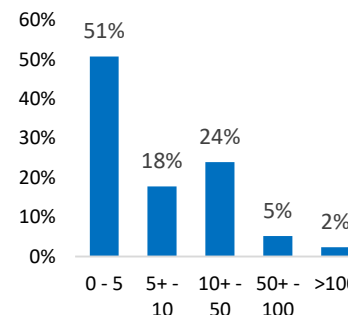


INVESTMENTS MADE at 30th Sept 2019 - totalling **£24.6m**

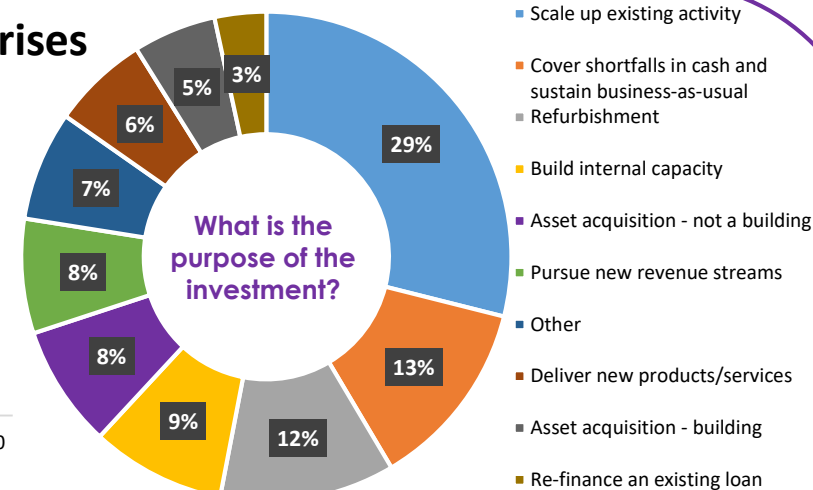
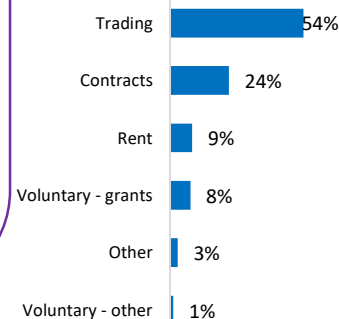


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Size of VCSE by number of employees



What is the primary source of income of investees?



Case Study: Homebaked (First Ark)

Homebaked received a Reach Fund grant of £14k to create a comprehensive business proposal.

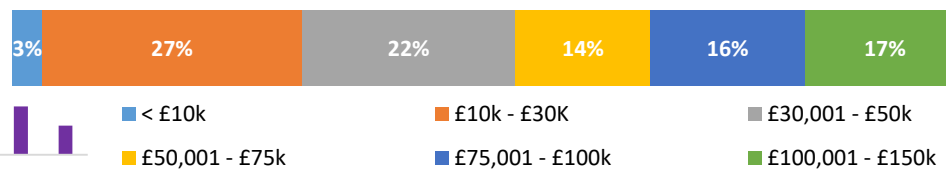
This enabled them to receive a **Growth Fund** grant of £15,500 and loan of £45,500 from First Ark Social Investment.

A dedicated catering unit and specialised equipment has enabled them to ramp up production to meet demand.

Homebaked will be able to add **72** places on their healthy eating course - children from local schools will get the opportunity to learn about nutrition and develop their interest in cooking



What is the spread of investment size?



Quarterly Dashboard to 30 Sept 2019: CAPACITY BUILDING

REACH

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

457

Grants awarded to date

£6.29m

Grants awarded to date

£14k

Average Grant size

£876k

Grants awarded this quarter

30

Social investor 'Access Points'

For more information see reachfund.org.uk



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Enterprise Development Programme

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

90

Feasibility Grants awarded to date

35 Homeless **53** Youth

£7.6k

Average feasibility grant size

40

Enterprise Learning places awarded

20 Homeless **20** Youth

33

Development Grants awarded to date

16 Homeless **17** Youth

£34.6k

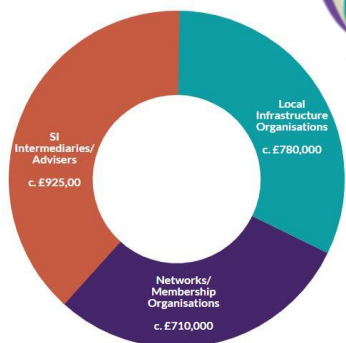
Average development grant size



[CLICK HERE to view interactive map](#)

For more information see sibgroup.org.uk/enterprise-development-programme

Organisation type



Connect Fund | Building a better social investment market

£2.4m has been awarded so far

1 investment & **60** 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

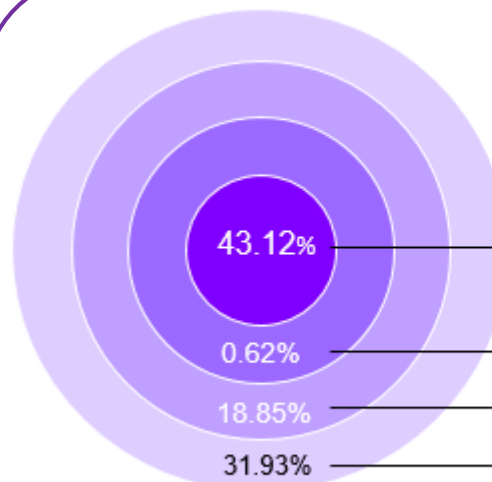
In an evaluation conducted of Connect Fund grantees **79%** of them "agree that there is more support available for VCSEs considering social investment than 18 months ago"

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



[Tier 1]

Charities and social enterprises delivering social impact in the UK

[Tier 2]

Charities and social enterprises delivering social impact elsewhere

[Tier 3]

Other organisations delivering social impact

[Tier 4]

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

5.48%

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

Portfolio investments at 30th Sept 2019