

Social investments made by investors into charities and social enterprises

Of the 499 investments made into charities and social enterprises by the social investors to date...

£62k
Average investment

47 months
Average loan term

5 FTE
Median investee employees

7.05%
Average interest rate

£236k
Median turnover of recipients

64%
Loan recipients also received a Growth Fund grant

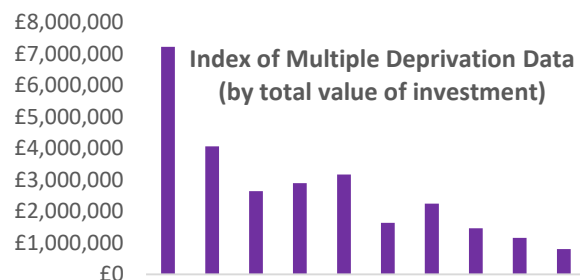
29%
Borrowers that received Reach Fund or other capacity building support

13%
Of total investment given as grant

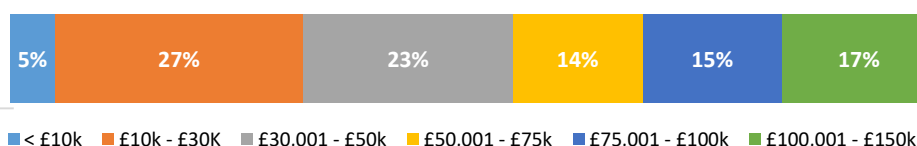
INVESTMENTS MADE at 30th June 2020 - totalling **£30.9m**



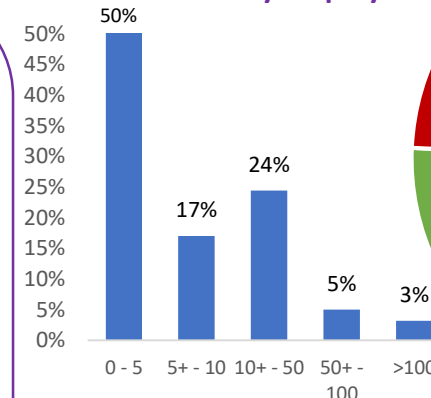
[CLICK HERE](#) to view interactive map



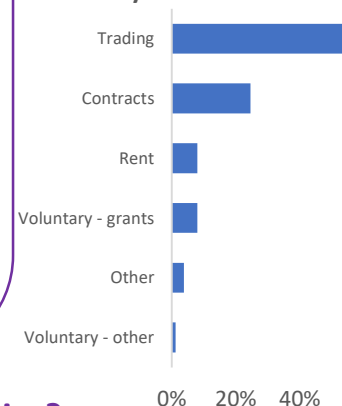
What is the spread of investment size?



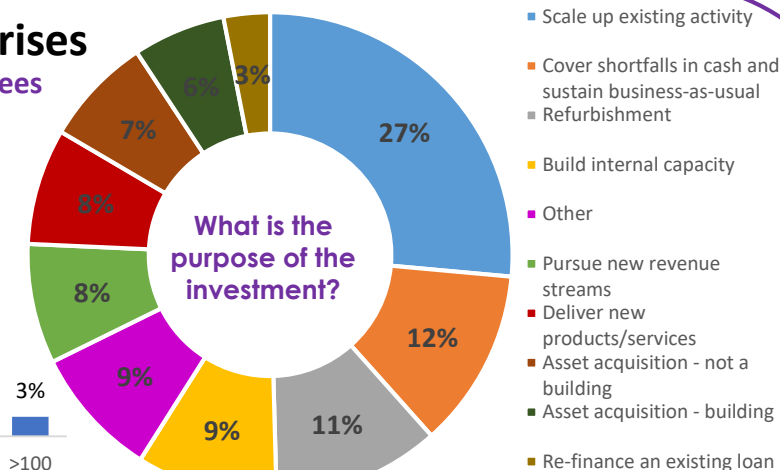
Size of VCSE by employees



Primary Source of Income



What is the purpose of the investment?



Case Study: Sow the City (GMCVO)

Sow the City received a £25,520 **Growth Fund** investment from GMCVO's Access to Growth Fund.

Sow the City secured a lease for 12 years for an old power station owned by a local Housing Association. The investment was used to support insulating and lighting the building, and refurbishing an office space and communal reception area.

GMCVO have visited the site and offered encouragement and useful contacts and networking

Sow the City stated that: "the loan gave us the confidence to plan ahead for a few years" and "facilitated more confidence in staffing".



Quarterly Dashboard to 30 June 2020: CAPACITY BUILDING

REACH

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

576

Grants awarded to date

£7.85m

Grants awarded to date

£13.6k

Average Grant size

£251k

Grants awarded this quarter

30

Social investor 'Access Points'



[CLICK HERE to view interactive map](#)

For more information see reachfund.org.uk



Enterprise Development Programme

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

63 organisations have been accepted into the first cohort of the new programme

21 Homeless **12** Youth **14** Equality **16** Mental Health

Organisations' trading models:

49% B2C (direct consumer) **40%** B2B (business/charity)

11% B2G (Government/public sector)



[CLICK HERE to view interactive map](#)

For more information see www.enterprisedevelopmentprogramme.org.uk/



Connect Fund Building a better social investment market

£2.7m has been awarded so far

1 investment & **81** 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



241 new networks,
collaborations or
partnerships



94 conferences or
events held

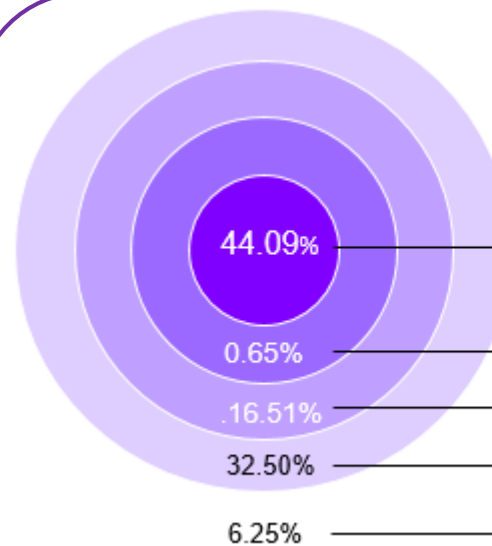


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Strengthening the social investment market to better meet the needs of VCSEs - <http://www.connectfund.org.uk>

OUR ENDOWMENT

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



Portfolio investments at 30th June 2020

- [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)
- Cash**

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