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2. Complete a short survey
3. Receive support and resources

GET INFORMED is a joint initiative in partnership with:



Supporting charity and non-profit chairs



Quality Trustees from a Trusted Source



## Social Impact Investors Group (SIIG)

Supported by:



The realisation that it is possible to make money and simultaneously do good has been hugely exciting. The learning and implementation process has required time and effort, but there is an excellent support network and a growing pipeline of investment opportunities.

**Barnaby Wiener**, Trustee, Treebeard Trust



It makes sense that our investments as well as our grants deliver on our charitable mission. We have now started to look at social investment funds that may be lowly or uncorrelated to investments in our expendable endowment which could also make a positive social impact.



**Peter Baxter**, Trustee & Chair of Investment Committee, Trust for London



We have supported a number of organisations through grants that later go on to access social investment. We thought long and hard about social investment and felt it has an important place in the venture philanthropy approach that we take with the organisations we support.

**Ruth Knagg**, Trustee, Andrews Charitable Trust

To register your interest and find out more about the GET INFORMED campaign visit:  
[www.bigsocietycapital.com/get-informed](http://www.bigsocietycapital.com/get-informed)

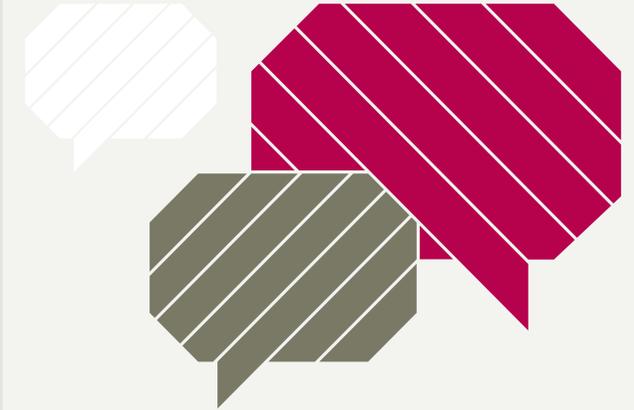


# GET INFORMED

Social investment for boards

## For trusts, foundations and charities with investable funds

Social investment is the use of repayable finance to achieve a social as well as a financial return.



**GET INFORMED is a campaign to help support charitable trustees to better understand the opportunities and risks of making social investments.**

## In this guide you will find information on:

- How foundations and charities with investable funds can engage with social investments
- Key things to know about making social investments if you are a trustee, CEO, finance director or senior executive
- What the GET INFORMED campaign offers

## How foundations and charities can engage with social investment

Charities with investments e.g. trusts, foundations and operational charities can get involved in social investment in a number of ways depending on their mission, size and where in the ecosystem they feel they are best placed to play a role.

### Below are some ways charitable organisations are already engaging with social investment:

- **Grants plus or venture philanthropy** – offer of loans or other types of investments as well as unrestricted grants and repayable grants; often with non-financial support such as mentoring, access to specialist expertise, board members etc...
- **Carve out from endowment or from reserves** – carving out a specific portion of money from the endowment to make “mission related investments” either directly into charities and social enterprises or through funds.
- **Allocating endowment funds to social investment** – identifying social investment funds that are suitable within your overall asset allocation e.g. charity bonds in bond allocation, or social housing in real estate.
- **100% impact** – making a commitment to having all resources and financial assets in investments that produce a social impact.
- **Expert investor and influencer** – charitable investors that make social investments alongside other investors can offer expertise on social issues that the investment might be trying to solve.

## Key things to know for Trustees, CEOs, Finance Directors and Senior Executives

Making social investments can seem risky and be an unfamiliar concept for trustees. Having the right knowledge and support can help.

### Key things to know:

- **Social investment is an additional tool** – consider its role alongside your grant-making and other activities.
- **Consider your legal position** – the Charities (Protection and Social Investment) Act 2016 gives all charities\* statutory powers to make social investments.
- **Levels of return** – trustees should make sure that the expected level of financial return and the social impact support the charity’s mission.
- **Consideration of private benefit** – any private benefit that might arise in relation to any proposed social investment must be necessary, reasonable and in the interest of the charity.
- **Cultural shift and collaboration internally** – making social investments often require finance/investment and grant making personnel to work together.
- **Consider the skills experience and capacity of board members and staff** – think about investment expertise needed at board and executive level needed to make social investments, perhaps recruiting new members or co-optees.
- **Think about getting external advice if needed** – if there are gaps on the board or in the executive team, it may be necessary to get external financial advice on specific social investments.
- **Risks** – as with all investments, social investments carry risks, some will be unique to this type of investing. Trustees will need to consider these carefully.

\*except statutory charities and Royal Charter bodies

## What does GET INFORMED offer?

GET INFORMED offers a number of resources to help board members of trusts, foundations and charities learn about making social investments.

### Key things on offer:

- Free events and workshops
- Free materials and resources on social investment
- Access to peer networks
- Mentors to build knowledge
- Board facilitated sessions
- Case studies of various board perspectives

“As with any other aspect of charity strategy, trustees should feel confident to make bold and even radical decisions on social investment as long as they are mindful of their duties and responsibilities in reaching the decision and they know they have the information they need.”

Sarah Atkinson, Director of Policy and Communications, Charity Commission



CHARITY COMMISSION  
FOR ENGLAND AND WALES