



Impact at Scale

2030 Strategy



Vaillant

aroTHERM plus





Expanding our vision, clarifying our focus

A word from our Chief Executive, Nick Temple OBE

At Social Investment Business (SIB) we finance social change, backing the charities, social enterprises and community organisations that are strengthening our communities and building a fairer society.

Recent years have seen significant growth for SIB. We have disbursed the largest amount in the shortest time ever. We've invested in our team, doubling in size and becoming a fully 'remote' organisation whilst improving staff engagement. We've launched innovative new streams of work, grown the proportion of our funding to disadvantaged areas and groups, and supported a more diverse set of leaders.

Whilst we are one of the longest-standing social investors in the UK, recent growth now positions us as one of the UK's largest too, having invested £0.8 billion into over 6,000 organisations.

As the milestone of £1 billion deployed approaches, the SIB team, leadership and SIB board began reviewing our approach, priorities and brand in June 2024, with the aim of shaping a new strategy for our work to 2030.

As this 2030 Strategy sets out, we are entering a new phase of our development,

stepping up to lead for the sector and maximising the impact of social finance. We're expanding our vision as a strategic partner to the community sector, while defining our priorities more clearly across the green transition, community infrastructure and public services.

While there are real challenges ahead for the social sector, we believe by 2030, with the right finance and support, the sector can not only be more resilient but have expanded its influence. At SIB, we finance social change – and in this new strategy we're stepping up to help shape the future of the sector.

CONTEXT

The social sector continues to have a significant impact in communities across the UK, tackling inequality, improving lives, and driving positive change. But the sector also faces a range of headwinds in seeking to build a more equal society.

The challenges ahead:

- Financial resilience: Limited capacity to grow, to sustain operations and innovate.
- Funding environment: Competitive landscape with limited revenue-generating opportunities.
- Climate: Rising energy costs and the pressures of ensuring a just transition.
- People: Difficulties in recruiting and retaining talent across board, team and volunteers.

These challenges combine to threaten the sector's ability to deliver at pace and at scale. Our role, and the aim of this new strategy, is to help address these problems so the sector can be an active participant in mainstream developments, improving people's lives on the ground and effectively influencing the operating environment.





THE VISION

We will finance social change, supporting the social sector to become more resilient, diverse and distributed with greater national influence, so that together we build stronger communities and a fairer society.

We will do this by:

1. Disbursing £1bn by 2030: working with Government and other funders to deliver new programmes, while designing and innovating ourselves so that more, well-designed money and support reaches the sector.
2. Using insight for influence: bringing together our leading data analysis, research and customer insights to inform our programmes, innovation and to make the case for the social economy in mainstream policy and financial developments.
3. Scalable initiatives: Developing and innovating new ways to leverage social finance for impact at scale, particularly in relation to our three core priorities: green transition, community infrastructure and public services.

To achieve this, we will maintain two operational approaches:

- Readiness: this strategy is built upon an agility and flex to scale that enables us to both innovate and pursue new opportunities, while maintaining the quality of delivery. We will adopt a continual 'state of readiness'.
- Excellence: maintaining the quality of our work, both as a reliable, efficient and effective financial intermediary, and across our five foundational areas: People & Values, Finance, Comms, Risk, Governance, Systems.

STRATEGIC PRIORITIES

To maximise our impact for the sector, we will pursue three priorities that represent what we consider to be the most relevant for our strategic focus. These are driven both by need and by opportunity, and provide a framework for us to describe, structure and implement our work.

Green transition

Tackling the challenges of climate change for the social sector and harnessing the opportunities available from the green transition across energy and nature.

This looks like:

- Launching the Energy Resilience Fund
- Publishing research and advocating on the cost of energy and need for energy efficiency investment
- Innovating new pilot programmes across clean heat and power.

Community Infrastructure

Enabling the social economy to maintain and grow sustainable community assets including housing, community buildings and land.

This looks like:

- Identifying the common blockers for investment in community infrastructure and ways to address these
- Researching solutions including Property Linked Finance and the role of Local Authority leases.
- Delivering major capital funds for community infrastructure, including the Youth Investment Fund

Public Services

Ensuring the social economy is at the heart of the renewal and restructure of public services, including design and delivery.

This looks like:

- Advocating for procurement reforms to better support the sector
- Championing the community role in shaping and delivering national priorities
- Expanding and improving the funding we provide to service-delivery organisations



HOW YOU CAN GET INVOLVED

1. Get funding and support

Our team is ready to listen to what you're looking for, talk you through all our funding opportunities, work out what might meet your needs, and support you as you apply.

Find out more about our currently available funding on our website, or get in touch and someone from our team will get back to you: enquiries@sibgroup.org.uk

2. Invest with us

Our social impact investment funds are used to invest in high impact charities and social enterprises across the UK.

Our investors are diverse. We've supported government departments, local authorities, institutional investors and charitable foundations to invest and achieve their goals. Whether investors are looking for financial or impact returns, we tailor our approach to make sure our investors and investees benefit equally from our funds.

If you are interested in investing into any of our currently open funds, or in hearing more about funds that we are developing, please get in touch with our Director of Investments, who would love to hear from you:
Rob.Benfield@sibgroup.org.uk

3. Become an introducer

We focus on charities, community organisations and social enterprises, and have spent over 20 years supporting organisations across the UK. By connecting us to the charities and social enterprises they work with, our community of what we call, 'introducers', plays an integral part in this.

We cater for a range of introducers, so whether you are an accountant, a broker, a membership body or simply have relationships with charities and social enterprises, then please contact the team at: loans@sibgroup.org.uk

4. Follow along

You can follow our work by subscribing to our newsletter and following on social media

 @TheSocialInvest

 @thesocialinvest

 @Social Investment Business



Finance for social change

At Social Investment Business, we use finance to build stronger communities and a fairer society.

Cover: The Swannery, Bristol

Page 2: Katy King, Nesta, Climate Visuals

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