



FULCRUM'S APPROACH TO ENVIRONMENTAL, SOCIAL AND GOVERNANCE

CASE STUDY

“ AS A RESPONSIBLE INVESTOR,
FULCRUM IS FOCUSED ON
DELIVERING INITIATIVES
THAT ARE SUSTAINABLE, FAIR
AND BENEFICIAL TO LOCAL
COMMUNITIES ”





DEFINING ENVIRONMENTAL, SOCIAL AND GOVERNANCE (ESG)

- In changing, challenging times, it is crucial that investors demonstrate that their activities are ethical and socially conscious to priority global issues such as climate change, equality and diversity, and corporate transparency
- These factors are broadly defined as **Environmental, Social and Governance (ESG)** which cover a company's '**green credentials**' such as its energy use, waste and pollution; the **social values** it follows in how it works with staff, key partners and the community; and its commitment to **operate in a fair and transparent way**
- As a responsible, values-led investor, Fulcrum already place a clear focus on ESG criteria in the delivery of community healthcare facilities and initiatives throughout the UK - indeed, as Fulcrum's parent company Meridiam says: **"We deliver sustainable infrastructure that improves the quality of people's lives"**





FULCRUM'S TARGETED APPROACH TO ESG

- While ESG offers valuable criteria for companies to follow, it remains a very broad framework where **greater clarity is often needed** to help inform investment decisions
- Fulcrum have therefore developed a **more targeted, strategic approach**, offering a much more **clearly defined framework** of what its partnerships, events and healthcare initiatives must deliver.

FULCRUM'S

FRAMEWORK INCLUDES:

POSTIVE OUTCOMES TO THE COMMUNITY

- Fulcrum's focus is to **make its healthcare facilities community assets** so as part of this, it is crucial that any partnerships or initiatives are directly linked to each building, and help create a positive and notable impact within the community - in other words, **the building and the community is the focus, not Fulcrum**
- An important starting point is to **research local communities to understand their key needs** so that Fulcrum can ensure its projects and initiatives deliver to them. Equally Fulcrum research **existing local organisations** with similar goals and a proven track record of results who could be potential partners

POSITIVE OUTCOMES FOR THE HEALTHCARE SYSTEM

- Fulcrum's facilities deliver vital health and social care, so it is crucial that any new partnerships or initiatives **reinforce this primary role**
- Raising awareness and **'driving better use' of healthcare facilities** is therefore a core part of the criteria Fulcrum look for in its initiatives and partnerships - not only does this help to **improve the community's health** and well-being, it also helps **ease the strain on the wider NHS system**, avoiding large hospitals treating needs that would be better served at a local level

SUSTAINABLE, LONG-TERM IMPACTS

- The projects and initiatives Fulcrum deliver must demonstrate that they are **sustainable and will deliver a longer-term impact** - not a 'one year hit' that quickly fades away
- As a result, Fulcrum are careful to **identify partners that have the time, skills and resources** to deliver initiatives over the long-term, maximising the chances of delivering lasting change and benefits

ALIGNING WITH LOCAL, NATIONAL AND GLOBAL PRIORITIES

- To ensure maximum impact and benefits, Fulcrum look to align their initiatives with **wider public goals** such as **NHS and Government healthcare policies**, and the priority interests of the local community
- At a global level, Fulcrum also look to develop projects that have clear links and a positive contribution to the **UN's Sustainable Development Goals**, specifically the goals focussed on "Good Health and Wellbeing"



THE BENEFITS OF FULCRUM'S APPROACH

- The framework Fulcrum has developed has been invaluable in assessing the impact of previous initiatives, offering 'lessons learned' to help inform the development and delivery of future initiatives
- The Fulcrum Board can now make informed decisions about what initiatives to invest in, ensuring they will deliver: **sustainable, long-term impacts; benefits to local communities;** and a **positive impact on the healthcare system**
- As a result, Fulcrum's received an **award for 'Environmental, Social and Governance of the Year'** at the Partnership Awards 2020 - welcome recognition of the huge importance Fulcrum place on ESG and being a responsible investor



