

12<sup>th</sup> July 2023

## **Fulcrum publishes first ‘Social Value Annual Report’ setting out the “*real and meaningful change for communities*” created by ESG activities**

- **Independent analysis looks at ‘hard to measure’ ESG activities to assess their true impact**
- **Analysis shows that every £1 invested in community activities delivers £18 in social value**

Leading healthcare investor Fulcrum has today published its first ever ‘Social Value Annual Report’ which uses independent analysis to assess the true impacts of the company’s Environmental, Social and Governance (ESG) and Corporate Social Responsibility (CSR) activities.

Under the NHS LIFT Partnership, Fulcrum has helped to deliver more than 40 NHS Primary Care facilities across England that already play a vital role in supporting community health. However, ‘bricks and mortar’ healthcare is only part of the story and Fulcrum have also placed a premium on delivering innovative ESG and CSR initiatives that reach out to communities, ensuring that those most in need receive support, whenever they may need it.

ESG initiatives play an increasingly important role for all organisations, but with only very broad frameworks to follow, it can be difficult to accurately measure the benefits these activities deliver and ensure that time and resources are being invested in the right areas. To tackle this challenge head-on, Fulcrum commissioned leading consultancy Costain to carry out extensive, independent analysis of the many community partnerships, ESG and CSR activities Fulcrum is delivering throughout the country.

The result is the inaugural edition of the ‘*Fulcrum Social Value Annual Report*’ [published today](#). Using a mix of qualitative research, industry- recognised methodology and publicly available data, Costain’s analysis of Fulcrum’s ESG activities concludes that:

### **Every £1 invested by Fulcrum in 2022 has delivered over £18 in social value to stakeholders, partners, and residents living near to Fulcrum assets**

- The report contains individual ‘Social Return on Investment’ (SROI) data for many of the community initiatives Fulcrum has delivered – aggregating this cost-benefit-analysis gives an overall ‘Social Return on Investment’ (SROI) ratio of 18:1, meaning on average, every £1 invested by Fulcrum in ESG activities delivers £18 in social value, helping to deliver “*real and meaningful change for the communities surrounding Fulcrum’s NHS LIFT facilities*”.

### **Fulcrum’s investment has delivered more than £1.5m of social value across a diverse range of audiences and community groups over the last 12 months**

- Fulcrum’s investment in community activities over the last 12 months has helped to deliver more than £1.5m of social value in total, directly benefitting a variety of audiences and community groups - from gardening projects for people in social care, healthy eating sessions for school children, better support for Mums-to-be, or access to health support for men and women over 50.

### **ESG activities are not just about numbers, they are also about helping to improve people’s lives**

- Together with assessing the social value delivered by Fulcrum’s ESG activities, the report also captures feedback from some of the end-users that benefit most from these activities. These quotes capture the “*increased happiness*”, “*purpose and passion*” and “*increased life opportunities for the future*” that Fulcrum’s projects have created for many people.

**Fulcrum CEO Sarah Beaumont-Smith said:** “*Community health stretches far beyond the footprint of NHS buildings and we know that much more can be done to reach out into local communities, ensuring that those most in need receive support whenever they may need it. Working with NHS partners and local groups, our investment in ESG has been a fantastic way to support communities but it is vital to ensure these activities are achieving the right results and reaching the right people.*”

*“The results in our first ‘Social Value Annual Report’ are hugely encouraging, showing the significant value of investing in ESG activities and the “real and meaningful change” delivered to local communities. But just as important are the ‘lessons learned’ set out in the report, giving us invaluable insights to help to shape future ESG activities and ensure we continue to add huge value to community health and wellbeing.”*

- Ends -

## FULCRUM'S SOCIAL IMPACT OVER THE LAST YEAR

2023

**11**   
social value  
initiatives  
directly funded

**£18** in social value  
delivered for  
every  
**£1** invested   


over  
**£1.5M**  
in social value delivered  
in total

### FULCRUM'S ESG ACTIVITIES HAVE INCLUDED:

 **36**  
healthy cooking sessions  
for 100 local students

 **3K+**  
gardening hours  
and 58 participants

 **5**  
rooms created for use by  
community organisations

Partnerships formed with  
**3** major sports  
teams and  
tournaments 

 **364**  
exercise sessions made  
available to local residents

over  
**£1.5M**  
in social value delivered  
in total