

# Community Investment Fund Policy

**Date written:** February 2010

**Date reviewed:** April 2023

**Purpose:** To set out Bernicia's approach to providing Community Investment Funding to benefit Bernicia customers and the communities we operate in.

**Scope:** To ensure the Community Investment Fund is allocated in line with Bernicia objectives and priorities, funding criteria and to consider applications from Bernicia residents, community groups, charities, voluntary organisations, and partner agencies.

**Definitions:** Community Funding – funding provided by Bernicia to improve the quality of life for Bernicia tenants and enhance neighbourhoods and communities in which they live.

**Date for review:** April 2026

**Responsibility:** Customer Engagement Team Officers

## Policy

### 1. Introduction

- 1.1 Bernicia is committed to adding Social Value for its tenants and neighbourhoods. This policy sets out how the Community Investment Fund will contribute to this commitment.
- 1.2 A dedicated budget for Community Investment will be provided annually at the start of each financial year 1<sup>st</sup> April-31<sup>st</sup> March.
- 1.3 Projects funded should fit within one or more of the following priority themes:
  - Health and wellbeing
  - Supporting communities
  - Employment, skills and training
  - Financial well-being

### 2. Policy statements

- 2.1 Bernicia residents, community groups, charities, voluntary organisations and partner agencies can apply for Community Investment Funding.
- 2.2 A Community Investment Panel, made up of Bernicia tenants and leaseholders will oversee expenditure against this budget in line with agreed priorities and objectives.
- 2.3 We will only consider a maximum of 2 successful applications per scheme/unit/estate in any financial year. Where there is a second submission, successful funding award will be dependent on nature of application and criteria suitability.
- 2.4 We will only accept applications which benefit the majority of residents. Those for individual gain will not be accepted.
- 2.5 Community Groups making funding applications must have a form of constitution with associated financial arrangements.
- 2.6 If a bid is made for a community day or group activity, the applicant must demonstrate if there is a level of match funding or other contribution being made and how the activity will support continued social inclusion.
- 2.7 Applications which do not meet our commitment to equality and diversity, which are the statutory responsibility of others and that do not provide outcomes for tenants and the community, will not be considered.

- 2.8 Where possible, the number of tenants and residents affected by the requested funding should be identified in the application.
- 2.9 We reserve the right to refuse an application prior to discussion with the Community Investment Panel, if it is not considered to have sustainability, longevity, or value to the community.
- 2.10 Any on costs (for example, maintenance and insurance) for equipment or landscaping must be taken into consideration during all phases of the application.
- 2.11 We will seek (where appropriate) technical advice to ensure requests conform to current health and safety regulations and are fit for purpose.
- 2.12 Only qualified/approved trades and contractors will carry out works.
- 2.13 We will request 2 quotes for funding, where appropriate (dependent upon nature of the enquiry).
- 2.14 Members of the Community Investment Group directly involved with an application will be asked not to be present when that particular application is being considered.
- 2.15 The outcome of any request will be provided (in addition to any telephone calls) to the principal applicant in writing. Where the principal is unavailable, the secondary contact provided will be communicated with.
- 2.16 Applications which are rejected will not be reconsidered and a new amended application will be required for re-submission.

### **Discretionary**

- 2.17 Funding applications up to £300 can be agreed by the Customer Engagement Team and reported to the Community Investment Panel.

Using the criteria set out in the policy, the Customer Engagement Team can make a decision as to whether an application will be of benefit to an estate or community.

The Community Investment Panel, although not directly involved, will be informed of these grants.

- 2.18 Applications above £300 will be communicated to the Community Investment Panel to help with the decision making process.

## Strategic

- 2.20 A proportion of the Community Investment budget will be reserved to support objectives/priorities within Bernicia's Corporate Strategy and/or Annual Plans. This will include larger projects that can provide significant outcomes for our tenants through partnership work.

The Community Investment budget is aimed at helping us deliver on the 4 key objectives within our corporate plan 'Housing People, Helping People', particularly our investment in homes and communities:

- Listening and delivering exceptional services
- Investing in homes and neighbourhoods
- Demonstrating organisational effectiveness and inclusivity
- Working collaboratively to support the North East region

### 3. Responsibility and implementation

- 3.1 The Customer Engagement Team (referred to as the 'Grant Facilitators') will be responsible for implementing this policy.
- 3.2 The Customer Engagement Team will oversee the application process and support tenants in applying for funding.
- 3.3 The Customer Engagement Team will work closely with the Community Investment Group when considering relevant applications.

### 4. Actioning the policy

- 4.1 This policy will be actioned every time there is a request for Community Investment Funding.

### 5. Monitoring the policy

- 5.1 The Customer Engagement Team will monitor applications to ensure funding is awarded fairly and correctly.
- 5.2 A review will be carried out on an annual basis or when there is any change to the funding process.

## 6. Resources

6.1 There are currently no resource implications because of this policy.

## 7. Equality and Diversity

7.1 An equality and diversity impact assessment has been undertaken on this policy. In carrying out its services, we are committed to:

- Treating all customers and employees positively regardless of any personal characteristics including gender, age, ethnicity, disability, sexuality, gender reassignment or religion.
- Taking seriously all complaints and investigating and responding accordingly.
- Using plain language and providing information in other languages, large print, audio and Braille on request.

**Uncontrolled if printed – This may not be the latest version of the policy**

**All policies must be printed from Connect only – please make sure it is the latest version.**

