

Community Investment Fund Policy

Date written: February 2010

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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 that the Community Investment Fund budget 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 in which they live.

Associated documents:

- Community Investment Fund Application Form
- Community Investment Fund Application Guidance Notes
- Community Investment Fund Information Leaflet
- Customer Engagement Privacy Statement

Date for review: April 2023

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.
- 1.3 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 Group, 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 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 show that a level of match funding is being carried out 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 Group, if it is considered to have no 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 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 all funding.
- 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.
- 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 Group.

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 Group, although not directly involved, will be informed of these grants.

- 2.18 Applications above £300 will be agreed by the Community Investment Group.

If an application needs a response before the next scheduled meeting, group members in the area the application relates to will get together to consider and approve them and a report on decisions will be taken to the whole group.

Any application above £1,000 must be agreed by the whole group.

- 2.19 The total amount of budget for Small Grants will be £10,000 per year. This may be varied on approval by the Community Investment Group. Community groups can apply for local community events and activities for example, garden projects or community fun days.

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:

- Delivering an exceptional housing service
- Investing in homes, neighbourhoods and communities
- Building an effective organisation
- Helping to deliver the regional agenda

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 as a result 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.