

# Heylo Together community fund policy and procedure

Version 1:0  
December 2024



## 1. Introduction

- 1.1 Heylo Housing Group Limited (HHGL) is the immediate parent company of the Group, which includes Heylo Housing Registered Provider Limited (HHRP). Also within the Heylo Group are a number of property owning investment vehicles (Pods) which are direct subsidiaries of HHRP. This policy covers all Group entities, (collectively referred to in this policy as 'Heylo'). The Heylo Group's purpose is to help aspiring homeowners and renters find a place to call home, provide home ownership solutions across England. HHGL Heylo currently provides three different Shared Ownership products – Home Reach, Home Reach Flex and Your Home.
- 1.2 All customer facing services to Heylo customers are provided by employees of ResiManagement, a separate, but commonly controlled company.

## 2. Definitions

- 2.1 **Applicant:** the individual applying for funding from the Heylo Together community fund. An applicant must be a Heylo leaseholder or shared owner who is residing in their Heylo home.
- 2.2 **Customer:** Any living individual who is currently engaged with the Heylo Group
- 2.3 **Resident:** Any living individual who is currently living in a Heylo Home
- 2.4 **Company:** Refers to ResiManagement and its subsidiaries and affiliates including but not limited to Heylo Housing Group Limited & Heylo Housing Registered Provider Limited.

## 3. Purpose and Scope

- 3.1 It is important to the Heylo Group that Heylo customers are empowered and enabled to carry forward community initiatives with the aim of benefiting Heylo residents and their local communities. The Heylo Together community fund has been created to provide funding to projects or organisations nominated by Heylo customers to such initiatives that will benefit Heylo residents and their local communities.
- 3.2 This policy and procedure sets out how applications for funding under Heylo Together will be processed and how decisions will be reached.
- 3.3 This policy and procedure are wholly discretionary. It places the Heylo Group under no obligation to consider or award applications for funding submitted under the Heylo Together initiative.
- 3.4 This policy and procedure operate only for the benefit of Heylo Group residents. The funding offered is not intended nor should it be used to replace statutory services or insurance arrangements that would otherwise be available.
- 3.5 This policy and procedure set out how an application can be made by Heylo customers for funding for voluntary or community groups, resident groups, charities, social enterprises or other not-for-profit organisations for initiatives that will have a demonstrable benefit to Heylo residents and the local community. No cash or other benefit will be awarded through this policy or procedure.
- 3.6 This policy and procedure also explain what criteria will be used to reach decisions on applications made.

- 3.7 Applications will only be granted to benefit those deemed eligible as set out in this policy and procedure.
- 3.8 Any applicant applying under this policy/procedure must do so in accordance with our other relevant policies, procedures and relevant legislation. For example, should a ResiManagement staff member also be a resident of heylo, they would also be obligated to declare this interest in accordance with ResiManagement Staff Handbook. Failing to do so may impact upon the success of the application as it will be noted that there has been a failure to appropriately adhere to existing policies and procedures by the Applicant.
- 3.9 An annual cap on the amount of funds that may be awarded as part of the Heylo Together initiative, further to which no further applications will be considered in that financial year.

## 4. Roles & Responsibilities

- 4.1 The HHGL and HHRP Boards are responsible for approving this policy, keeping it under review and for ensuring appropriate governance and controls are in place to achieve compliance with this policy. They are also responsible for determining any financial cap awarded through the Heylo Together fund.
- 4.2 The ResiManagement Executive Committee is responsible for overseeing compliance with this policy and procedure while maintaining reporting to the HHRP and HHGL Boards on its use.
- 4.3 HHGL and HHRP Boards have confirmed that the operation of this policy and procedure must be in accordance with the contract standing orders and financial regulations as set out in the governance policies and procedures within ResiManagement.
- 4.4 The ResiManagement Executive Committee therefore has delegated authority for:
- (a) Reviewing and monitoring the use of this policy and procedure during the financial year, carrying out an annual review of all approvals to inform the HHRP and HHGLs consideration of the continuation of this policy/procedure for the forthcoming financial year.
  - (b) Ensuring this policy and procedure is kept up to date and implemented across ResiManagement business, ensuring that day to day activities are conducted to meet the policy requirements.
  - (c) Ensuring that the policy is operated in accordance with the internal ResiManagement policies.
- 4.5 Applications will be considered by the ResiManagement Executive Committee. The quorum will be three members of the committee members of which one must be either the Chief Executive Officer or the Director of Public Sector Engagement.

## 5. Fund Eligibility Criteria

- 5.1 The applicant must nominate a project, initiative, voluntary or community group, resident group, charity, social enterprise or other not-for-profit organisation to receive funding for a community initiative.
- 5.2 The application and the initiative applied for must meet the following criteria in order to be eligible for funding from Heylo Together:
- (a) The initiative must have an anticipated positive impact on the local community as outlined by the applicant in the application which can be measured in some agreed form.

- (b) The applicant must be able to demonstrate that the community initiative will benefit at least one, and preferably more than one, Heylo resident.
- (c) The initiative must be aligned with one of the following aims of the Heylo Together community fund:

Aim	Description
Community wellbeing and engagement	Projects that are designed to support the health and wellbeing of the local community, be that through specialised support, initiatives to encourage exercise and participation in sport or delivering community events to engage and bring together local people and reduce isolation and loneliness
Diversity, inclusion and community cohesion	Initiatives and events that celebrate diversity in our communities, promote inclusion and equal opportunities and support community cohesion
Sustainability, nature and place	Projects that aim to support nature and biodiversity, reduce emissions, enhance local green spaces or encourage community members to make the most of outside spaces. For example, community gardening or tree planting initiatives
Food access and security	Projects that provide access to food for those in financial hardship or support the work of food initiatives
Opportunity, skills and support	Initiatives that support access to education, training or work experience to build skills and increase opportunity in the community

- (d) The applicant must be able to provide reporting on the impact of the chosen activity, should funding be awarded. Examples of reporting can include but is not limited to report on the number of participants, photographs, participant testimonials and surveys and/or reports on the extent to which the initiative met the anticipated objectives.
- (e) The applicant must agree to allow reporting and communications by Heylo on the project and the outcomes achieved by the funding, engaging with the Heylo marketing team to provide information including photographs as appropriate for Heylo publications.

5.3 The amount applied for should be no more than is reasonably required to achieve the purpose.

## 6. Application procedure & decision making

### 6.1 Applications:

- (a) All applications must be submitted in accordance with the following procedure. Should an application not be submitted in accordance with this procedure or compliant with the eligibility criteria it may not be deemed to have been validly submitted and may not be considered.
- (b) Every request is considered on a case-by-case basis and any award is wholly discretionary as to the determination of the panel, which may be informed by other information which is not in the public domain such as the availability of funding for the Heylo Together fund.
- (c) ResiManagement staff members can recommend the Heylo Together community fund to Heylo residents for them to apply for funding under Heylo Together in accordance with this Policy and Procedure. Should a ResiManagement staff member encourage or support any application, this will not give rise to any presumption of award or other weighting applied to decision making.

- (d) Applications should be submitted via the specified form appended to this policy and procedure. Application forms should be completed online and/or sent to [HeyloTogether@heylohousing.com](mailto:HeyloTogether@heylohousing.com) or in writing to our offices.

## 6.2 Review of Eligibility

- (a) Once submitted, the application form will be automatically routed to the Heylo Together Team who will review the request to determine if the applicant, nominated organisation and proposed initiative are eligible in accordance with this policy. The Heylo Together Team may ask for supporting / additional evidence to be provided to support the application.
- (b) The Heylo Together Team will check that the applicant is a Heylo customer that is currently residing in their Heylo home, with no applications to sub-let the property being active. The Heylo Together Team may make reasonable enquiries of the applicant to seek to determine if the application is eligible for consideration.
- (c) The Heylo Together Team will seek to review applications fortnightly.
- (d) If the Heylo Together Team determines that the application should proceed for consideration, it will direct it to the ResiManagement Executive Committee.

## 6.3 Recording Decisions and informing the Applicant

- (a) If the Heylo Together Team or the ResiManagement Executive Committee determines that the application should not proceed, a note of the decision made will be taken including the reasons for any decision made. Upon the determination of the above determining authorities, a note of the decision made must also be taken. This is achieved by:
  - (i) Completing the form
  - (ii) Ensuring the Heylo Together Community Fund spreadsheet is up to date
- (b) Once a decision has been made, the outcome will be communicated by the Heylo Together Team to the applicant in writing including any reporting requirements to monitor the use of the support awarded. No commitment as to the success of any application is given.
- (c) Any decision recorded will not be a minute of the full discussion. The decision and reasons will be shared with the applicant should the application be refused.
- (d) There is no time period through which funding under Heylo Together will be given and no expectation should be set as to such an award

# 7. Appeal

- 7.1 There is no right of appeal to a decision once made.

# 8. Review and Ownership

- 8.1 The owner of this policy is ESG and Sustainability Manager.
- 8.2 This policy and procedure will be reviewed every 2 years, or sooner if there is a specific legislative, regulatory or service requirement or change in guidance, law or practice.

## Version Control

Version	Date	Author	Verifier	Comments
1.0	02.12.2024	ESG and Sustainability Manager & Director of Governance and General Counsel		



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format or language, please let us  
know and we'll do our best to  
accommodate your needs.

Heylo and Heylo Housing are trading names of Heylo Housing Group Limited (registered in England and Wales with company number 11104403) and its subsidiary companies.

The Registered Office of each of the group companies is:  
6 Wellington Place, 4th Floor (Ref: CSU), Leeds, LS1 4AP

HHRP is a private limited company (Companies House Number 06573772) and is a for profit Registered Provider (registration number 4668) regulated by the Regulator of Social Housing.

HHRP Registered Office:  
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