

# COMMUNITY POLICY

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**PATRON**  
CAPITAL PARTNERS

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## 1 Purpose

The Board of Directors of Patron Capital Advisers LLP (hereinafter "Patron") has approved this Community Development Policy.

Through this Policy, Patron commits to sustainable development, protection and improvement of the communities where Patron invests.

## 2 Area of application

This policy applies to both Patron and its investment funds. It also guides Patron's interactions with affiliated foundations and charitable associations. Patron demonstrates a strong commitment to initiating and supporting charitable initiatives across various sectors on an international scale. Additionally, Patron encourages the active involvement of its staff and partners in charitable causes.

Patron focuses on several key areas, including:

1. **Foundation Initiative:** Support for essential aspects of society, such as improving and preserving the physical environment, providing immediate emergency aid, and offering ongoing support to vulnerable populations. This includes Patron's involvement and significant investment by its founder in the social impact organization WISH (Women in Safe Homes).
2. **Schools Initiative:** Support for educators and funding projects aimed at enhancing education through school refurbishments, construction of new schools, and providing training, support, and encouragement to teachers, thereby amplifying their positive impact on society.
3. **Armed Forces Initiative:** Support for current and retired members of the Armed Forces who defend freedom and our way of life, and who may face challenges as a result of their service.

These three initiatives are an example of the broader range of charitable endeavours undertaken by Patron. Patron publishes an annual report on its charitable initiatives, which can be accessed via the Patron website.

This Policy serves as a guideline for all staff members.

The actions undertaken to foster community development and social enterprise partnerships primarily involve:

- **Collaboration:** Patron collaborates with its employees, other private organizations, public institutions, and non-governmental organizations to maximize the effectiveness of its social initiatives.
- **Transparency:** Patron strives to continuously enhance the transparency of its social initiatives, ensuring that their impact is clearly measurable, visible, and utilized for agreed-upon purposes.
- **Additional Value Contribution:** Patron views its social initiatives as a contribution to the Community, in addition to its core business contributions.
- **Long-Term Commitment:** Patron's initiatives are intended to have a lasting impact and are approached with a long-term perspective.
- **Joint Company-Employee Commitment:** Patron encourages employee participation in its social initiatives.
- **Powering Positive Education:** Patron focuses on philanthropic initiatives in education, both locally and in other regions, to create a positive impact. This is achieved by developing projects that promote and facilitate access to quality education. Initiatives include mentoring programs, scholarships, and collaboration in establishing educational institutions. Patron's efforts in Nepal from 2020 to 2023 developed educational infrastructure that enabled over 4,000 children to enrol in school.
- **Powering Military Charities:** Patron engages in a collaborative program with several military veteran's associations. It supports various philanthropic initiatives, including donations and sponsorship of sports activities and programs promoting physical and mental well-being. The aim is to enhance the daily lives of veterans and show honour to those who have served in the armed forces. From 2010 to 2023, Patron successfully raised £5.3 million for this program.
- **Powering Positive Change:** Patron provides patronage and financial support for programs that empower individuals and groups from disadvantaged backgrounds. Initiatives include sponsoring sports competitions and organizing activities that promote the full integration of marginalized groups. These efforts aim to bring about positive change in the lives of those facing social exclusion.
- **Powering Inspiration:** Patron offers financial support to programs that promote self-improvement through sports. By backing such initiatives, Patron aims to inspire individuals and communities to reach their full potential.
- **Powering Social Impact Investing:** By leveraging its commercial expertise and partnering with a dedicated social impact manager, Patron established the world's first gender-lens property impact investment fund. The Women in Safe Homes Fund addresses the shortage of affordable, safe, and secure housing in the UK for women and their children who are at risk of or experiencing homelessness. The fund acquires and refurbishes properties, leased to specialized women's sector organizations and charities. These organizations provide affordable housing to women at risk of homelessness while offering them individualized support to rebuild their lives. Keith Breslauer pledged £1 million, and Patron donated an additional £1.5 million towards this purpose during 2020-2021.

### 3 Types of actions

The Policy encompasses activities that fall within the following categories:

1. Donations: Patron provides specific financial support to Non-Governmental Organizations or similar entities to aid in the development of their social activities, addressing the unique challenges faced by their respective communities.
2. Non-economic Support to Organizations and Individuals: This category includes non-monetary assistance extended to organizations and individuals. Examples may include allowing organizations to utilize Patron's office and conference facilities, providing mentorship and internship opportunities to individuals, and facilitating educational and training sessions.
3. Sponsorship and Patronage: Patron engages in sponsorship or patronage activities that align with the principles outlined in the Policy.
4. Investments in Communities: Patron makes long-term investments in the communities where it operates, with the aim of enhancing their well-being. This can involve establishing ongoing collaborations with organizations and other companies in various projects. Volunteering activities involving Patron employees are also undertaken as part of this commitment.
5. Protection and Assistance for the Integration of Vulnerable Groups: Patron prioritizes the protection and assistance of vulnerable groups, including war veterans, women who have experienced abuse, individuals with disabilities, and refugees.

Contributions, whether in the form of tangible goods or financial assistance, are determined based on the specific requirements and nature of each initiative.

The Policy emphasizes the promotion and collaboration of the Foundation in projects initiated and supported by community-based organizations. It also encourages engagement in activities that leverage the capabilities of various companies within Patron. Additionally, professionals from Patron are encouraged to contribute their expertise to relevant projects. Transparency remains a fundamental principle throughout these collaborations, ensuring openness and accountability in all interactions with different entities.

#### 3.1 Measures to guarantee the well-being and health and safety of the Community in the assets managed by Patron.

- Adherence to the highest quality and safety standards in the design and operation of real estate assets to be developed.
- Engagement with the local Community to provide updates on project progress and implement safety measures to mitigate any risks to the Community.
- Minimization of noise, dust, and other inconveniences to the local Community during the construction process.
- Incorporation of evacuation routes, emergency lighting systems, and photoluminescent signage required by applicable regulations in the design of properties.

- Ensuring that homes are equipped with fire protection materials, equipment, and accessories as mandated by relevant regulations.
- Implementation of measures to guarantee the well-being, health, and safety of the Community in Patron's interactions with its stakeholders.
- Compliance with existing legislation and international health and safety standards.
- Prioritization of occupational safety and risk prevention when hiring personnel and suppliers, fostering a safe working environment by seeking the most qualified professionals in the field.
- Promotion of adherence to health and safety protocols and the implementation of emergency plans in worksites, assets, and activities carried out by Patron to ensure a healthy working environment.
- Cultivation of a culture of health, safety, and environmental awareness, including integrated management from top-level management, fostering a proper risk perception, transparency, trust in reporting, continuous learning, and innovation.
- Proactive risk management concerning stakeholders throughout the entire activity cycle to prevent harm to individuals and property and minimize environmental impact.
- Compliance with current legal requirements in each location, monitoring legislative trends and international standards, and upholding commitments made to stakeholders.
- Establishment of improvement objectives and goals systematically considering stakeholder requirements, continuous performance evaluation, and implementation of necessary corrections to achieve set targets.
- Establishment and maintenance of communication channels with the Community, collaborating with local communities and society by providing reliable and transparent information.
- Incorporation of safety and health criteria in decision-making processes and relationships with suppliers.
- Promotion of sports and activities aimed at promoting healthy habits and improving the health of different community groups by building sport facilities in Patron developments when possible.

## 4 Transparency

Patron employs various communication channels to disseminate information about its investment and community development activities. These channels include:

1. ESG Information in Management Reports: Patron includes Environmental, Social, and Governance (ESG) information in the management reports of each fund it manages. These reports provide detailed insights into Patron's investment strategies and their impact on the community and environment.

2. Impact Reports: Patron publishes an impact report on its official website. This report highlights the outcomes and achievements of Patron's investment and community development initiatives, showcasing the positive changes and contributions made.
3. Company Social Networks: Patron leverages its presence on social media platforms to share updates and insights about its investment and community development efforts. Patron engages with its stakeholders through these channels, raising awareness and fostering dialogue.
4. Partner and NGO Communication Channels: Patron utilizes the communication channels of its partners and collaborating Non-Governmental Organizations (NGOs) to share information about its activities. This ensures that relevant stakeholders are informed about Patron's initiatives and their progress.

By utilizing these communication channels, Patron strives to effectively communicate its investment and community development actions to a wide range of stakeholders, fostering transparency and engagement.

## 5 Communication and implementation of the Policy

The Investment and Community Development Policy will be made available to all Patron's stakeholders, both internally and externally, and will be subject to appropriate communication, training and awareness actions for its timely understanding and implementation throughout the organization.

### Policy Implementation

Patron will ensure and monitor the effective implementation of the Investment and Community Development Policy.

### Updating and revision of the Policy

The Investment and Community Development will be reviewed and updated as appropriate, in order to adapt it to changes that may arise in the business model or in the context in which Patron operates, always guaranteeing its effective implementation.

### Grievance mechanisms at the operational level

Patron has compliance department and qualified personnel to deal with claims that occur in this area, for which it provides the following contact addresses

- Ordinary mail to the address: 33 Glasshouse Street, London, W1B 5DG
- Email address: [emilio@patroncapital.com](mailto:emilio@patroncapital.com)