

# Getting It Right Together

The South Gloucestershire Compact

Revised Compact March 2010

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# Foreword

In November 1998, the Government launched the National Compact. Recognising the essential contribution of the Voluntary and Community Sector and many shared aims, the document set out a number of commitments relating to how the Government and the Voluntary and Community Sector should work together, with the aim of strengthening relationships between the two sectors, ultimately for the benefit of people and communities. The National Compact included five codes of good practice covering Funding and Procurement, Consultation and Policy Appraisal, Minority Ethnic Voluntary and Community Organisations, Volunteering and Community Groups.

South Gloucestershire produced its own local Compact in November 2004, in order to develop stronger relationships and improved partnership working between the Public Sector and the Voluntary and Community Sector. Since this time there have been considerable changes in both the local and national environment with moves towards increased commissioning of services, increased collaboration and many changes in organisations and structures. This refreshed Compact document seeks to provide updated content in an accessible format to act as a clear reference for both sectors to underpin best practice partnership working for the benefit of people and communities in South Gloucestershire.

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# Introduction

## What is the South Gloucestershire Compact?

The South Gloucestershire Compact is a tool for improving relationships and partnership working between the Public Sector and the Voluntary and Community Sector (which includes social enterprise organisations, faith communities and BME organisations) in South Gloucestershire.

The Compact document aims to:

- Highlight key areas where the Public Sector and the Voluntary and Community Sector should be working closely together
- Provide a best practice guide for each of these areas, allowing both sectors to understand their commitments and to work together effectively
- Explain how the Compact will be monitored and implemented.

## Why do we need it?

The key principle behind the Compact is that the Public Sector and the Voluntary and Community Sector in South Gloucestershire share an over-arching goal:

“To serve, represent, develop and promote the well being of local people and communities.”

The Compact acknowledges that to serve our communities to the best of our abilities, we need to work effectively together as partners. This means, that from the smallest community group to the largest public sector organisation in South Gloucestershire, everyone has a part to play in working together to provide the best possible services for the people and communities of South Gloucestershire.

The South Gloucestershire Compact provides a mechanism to achieve this and in addition, by providing best practice guidelines for both sectors to follow, it contributes to greater parity in the relationship between partners who may often be unequal in terms of size, sophistication and influence.

At a strategic level, the development and growth of South Gloucestershire is largely driven by the Sustainable Community Strategy, a vision for South Gloucestershire that aims to ensure that local people fulfil their potential and experience an excellent quality of life. The South Gloucestershire Partnership, made up of key representatives from the Private, Public and Voluntary and Community Sectors, develops and oversees implementation of this strategy which is supported by clear priorities set against seven themes. The ultimate responsibility for delivery of these priorities lies with all three sectors and is undertaken through the Local Area Agreement, an agreement between the council, government and partner agencies. The Compact helps to underpin delivery of the Local Area Agreement by strengthening the relationship and effective collaboration between Public and Voluntary and Community Sector partners.

In this way, the Compact also complements many of the other partnership agreements across South Gloucestershire, such as the Parish Charter which is specific to the relationship between South Gloucestershire Council and the 44 Town and Parish Councils. In addition, successful

implementation of the Compact directly contributes to one of the priority targets within the Local Area Agreement, NI7: Environment for a thriving third sector.

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## The Compact - Who needs to be involved?

The growth and development of South Gloucestershire depends on the strength, independence and collaboration of all the sectors: Private, Public and Voluntary and Community. The Compact focuses on the Public and Voluntary and Community Sectors. However, where functions involving the distribution of public money are sub-contracted to private bodies, Compact principles should be applied here as well.

A list of Public Sector Agencies and Voluntary and Community organisations that have already signed up to the Compact is available on the internet at:

[www.cvs-sg.org.uk/south-gloucestershire-compact/who-is-it-for/](http://www.cvs-sg.org.uk/south-gloucestershire-compact/who-is-it-for/)

### *The Public Sector*

The Public Sector is the group of bodies or organisations, funded by public money, that are responsible for delivering public services on behalf of the government in South Gloucestershire. Some examples of key public sector organisations active in South Gloucestershire include:

- Avon & Somerset Constabulary
  - Tackling, preventing and reducing crime
  - Promoting safety
  - Community protection
- Avon Fire and Rescue Service
  - Emergency and protection services (e.g. road traffic collisions, fires, flooding, chemical spills, climber and animal rescue etc)
  - Promoting safety and prevention
- NHS South Gloucestershire
  - Commissioning of healthcare services (for example, hospital services, general practitioners and dentists) and direct provision of community services (for example, district nursing, occupational therapy and podiatry)
  - Improving the health and well being of people in South Gloucestershire
- South Gloucestershire Council
  - Provision of services to communities in South Gloucestershire (e.g. children & young people services, adult care, leisure & libraries, community care and housing, education, planning & transportation, waste and recycling, trading standards etc).
- Town and Parish Councils
  - Local government first tier provision of a vast range of services at community level

Over many years, Public Sector organisations have developed specialist and generalist services in areas such as health, public safety, housing, planning, tourism, the arts and youth services. Due to their governance by Public Law and stringent transparent accountability regulations, Public Sector organisations generally exhibit high quality standards. However, as a result, they can find it challenging to respond quickly to changing environments and to develop rapid, flexible, innovative solutions.

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## *The Voluntary and Community Sector*

The Voluntary and Community Sector (often referred to as the 'Third Sector' by central government), also includes faith communities and BME organisations and social enterprises. In general, organisations within the Sector can be said to be non profit distributing, independent organisations, operating with the goal of improving the quality of life for all or specific members of the community through the provision of support, services or charitable activities. They are often managed by committees made up of volunteers and often require the work and support of volunteers.

Examples of types of organisations and groups operating in South Gloucestershire include:

- Advocacy groups
- Arts organisations
- Charitable trusts
- Churches and other faith communities
- Clubs and societies
- Community groups
- Community owned businesses
- Co-operatives
- Equalities groups
- Infrastructure groups
- Local branches of national charities
- Mutual societies
- Regeneration groups
- Sports clubs
- Trade organisations
- Training providers
- Uniformed and other youth groups
- Village and community halls
- Voluntary service providers.

The degree to which organisations interact with the Public Sector varies considerably. Whilst some organisations have formal links through commissioning, funding and consultation, many who have been providing essential services to communities for many years (e.g. Scouts, Guides, Cadets, Church youth groups, sports clubs etc.), often have little or no contact with the Public Sector. This is sometimes due to cultural reasons or more often is a result of limited resources. Despite this, we need to encourage all organisations to contribute where possible to the development of policy and services in South Gloucestershire, specifically because they have valuable expertise and knowledge of local needs and issues.

In many cases, Voluntary and Community organisations offer a unique perspective on community matters due to their:

- Work within the community, often directly with people or groups on the ground
- Development of innovative services, often designed with service user involvement and directly addressing the needs of local people
- Representation of members in the community who otherwise would have no voice
- Accumulated experience, often over many years, in specialist areas where Public Sector representation is limited.

The size and sophistication of these organisations can vary considerably, from large national charities with many staff and volunteers to small community groups with a few members. Whilst groups are often run by highly motivated and experienced individuals, many are volunteers or work part time which can make communication challenging. A lack of resources can also lead to a more reactive and less systemic structure within organisations in contrast to the much larger Public Sector organisations. A successful Compact requires a flexible approach from all partners in order to harness the strengths and counteract the constraints of both Sectors.

# Getting It Right Together

## What's in it for us?

The ultimate winners, if we can successfully implement the Compact in South Gloucestershire, are the people and communities of South Gloucestershire, through improved services and support. However, there are also clear advantages for both sectors:

- **Better Outcomes** - A strengthening of the relationship between the Voluntary and Community Sector and the Public Sector ultimately leads to improved outcomes for our service users:
  - Clear commissioning processes improve financial relationships and allow organisations to focus on achieving successful outcomes for the community
  - Adherence of Voluntary and Community organisations to Compact commitments help to underpin quality commissioned services
- **Delivering Equality** - By working closely together, and in particular with equalities organisations, both sectors can be more effective both in delivery of equality and fairness for all and in tackling discrimination.
- **Guidance** - The Compact can be used as a guide to help understand when and how to work with each other. This leads to improved policy making and the design and development of better quality services
- **Checklist** - The activities of public sector organisations are governed by public law. Adhering to the Compact helps to ensure compliance with both the law and best practice guidelines produced by the government (many of which are incorporated within the Compact). The Compact also clearly outlines the commitments for the Voluntary and Community Sector and can be used to ensure that engagement and service delivery is of high quality
- **Public Relations** - In order to ensure continued support from local people and communities it is important that we continue to demonstrate effective cross sector collaboration. This can be achieved through successful implementation of Compact principles.

In addition to these common advantages there are also elements specific to sectors:

### *The Public Sector*

- **Improved Quality** - Involving and consulting with the Voluntary and Community Sector at the earliest stages of policy development, planning and service design helps Public Sector organisations to:
  - Make informed policy decisions through a better understanding of local needs, concerns and priorities
  - Develop more effective and responsive services that focus on outcomes and reflect the needs of local people and communities
- **Cost Efficiency** - More effective, efficient services can improve penetration at a lower cost and help to reduce the need for future support, resulting in long term savings
- **Targets** - Implementation of the Compact contributes towards the local government priority target NI7 ('creating an environment for a thriving Third Sector').

# Getting It Right Together

## *The Voluntary and Community Sector*

- **Fairness** – With transparent guidelines for best practice, power imbalances between sector organisations, often tied in with funding relationships, can be minimised
- **Best Practice Commitments** - The Compact underlines key principles relating to the relationships between the sectors which make a huge impact on the ability of Voluntary and Community Organisations to carry out their work effectively. These include:
  - Early engagement
  - Sufficient time for consultation
  - Full cost recovery
  - Long term funding
  - Notice periods
- **Redress** – The Compact provides a process for dispute resolution and describes further options for use where the principles of the Compact have not been upheld.

## What does the Compact cover?

The key areas covered by the Compact include:

- **Shared Principles and Commitments**  
This section looks at the principles shared by the Voluntary and Community Sector and the Public Sector as well as joint undertakings around volunteering and promoting awareness of the Compact
- **Involvement in Policy Development**  
This section looks at the key requirements for successful engagement of the Voluntary and Community Sector with the Public Sector in order to develop policy
- **Allocating Resources**  
This section looks at the key requirements for successful design and delivery of services
- **Achieving Equality**  
This section looks at how both sectors can work together to achieve equality and fairness for all.

Each of the sections lists commitments for the Public and the Voluntary and Community Sectors.

## How do I sign up to the Compact?

To sign up to the Compact call CVS South Gloucestershire to request a form or go to:

[www.cvs-sg.org.uk/south-gloucestershire-compact/who-is-it-for/](http://www.cvs-sg.org.uk/south-gloucestershire-compact/who-is-it-for/)

# Shared Principles and Commitments

## Shared Principles

In addition to the commitments governing working relationships between the sectors, covered in the next three sections, Compact partners share a number of common principles and commitments:

- **The Value of the Voluntary and Community Sector** An independent, thriving, sustainable and diverse Voluntary and Community Sector plays an essential part in the lives of people and communities in South Gloucestershire, contributing to the local economy and adding substantial value to local activities and resources
- **Working in Partnership** Partners can deliver better outcomes for the people and communities of South Gloucestershire by working together and understand that they share responsibility in achieving common aims and objectives, according to the capacity of each partner
- **Mutual Respect** Partners share a mutual respect and understand that whilst they have distinct but complementary roles in the development and delivery of public policy and services in South Gloucestershire, all their views are equally important and valid
- **Values** Partners have different forms of accountability and are answerable to a different range of stakeholders but in common to all is the need for integrity, objectivity, accountability, openness, transparency, honesty and leadership
- **Independence** Partners support the independence of Voluntary and Community organisations in South Gloucestershire. This includes their right to campaign within the law in order to advance their aims, to comment on public sector policy, to challenge that policy irrespective of any funding relationship that might exist and to determine and manage their own affairs
- **Sustainability** Partners recognise the importance of building sustainability and will seek out the best ways of meeting the current needs of people and communities without damaging the ability of future generations to meet their needs.

## Shared Commitments

### Volunteering

Partners to the Compact recognise that voluntary action is an essential component of democratic society and that volunteers make a vital contribution to the well-being of people and communities in South Gloucestershire. Volunteers commit their time and energy to benefit society and communities by providing services and activities in many different ways, from acting as trustees through to active engagement.

# Shared Principles and Commitments

## **Volunteering (Cont ...)**

Partners undertake to recognise the contribution of volunteers, support high standards in training, management and deployment and support and promote volunteering opportunities.

## **Promotion of the South Gloucestershire Compact**

Partners understand that the successful implementation of the Compact depends on wide awareness, understanding and application across the sectors. Therefore they undertake to:

- Promote the South Gloucestershire Compact amongst staff, volunteers, managers, trustees and management committee members and local councillors by regularly featuring the principles and undertakings in communications such as newsletters and websites.
- Provide training to ensure that there is awareness of Compact principles and an understanding about how these should be implemented in practice
- Ensure that inductions for new staff include reference to the Compact where appropriate
- Monitor the latest developments by using resources made available.

# Involvement In Policy Development

## Commitments for the Public Sector

### *When to Involve*

The earlier Public Sector organisations involve the Voluntary and Community Sector in policy and service development, the greater the benefit they will derive. The additional contribution of knowledge and expertise ultimately will lead to the development of more effective policies and services for communities. The Public Sector undertakes to:

1. Assess all new policies, initiatives, regulations, legislation and guidance to identify any implications for the Voluntary and Community Sector and carry out impact assessments as appropriate. Any assessments carried out should be recorded.
2. Ensure that the Voluntary and Community Sector is represented on relevant working groups in order to help highlight issues which impact the sector
3. Involve the Voluntary and Community Sector in formulating responses to regional and national consultations which impact upon it
4. Build consultation and wider involvement into planning processes and involve the Voluntary and Community Sector at the earliest possible stage on matters that will impact upon it.

### *Who to Involve*

The Public Sector undertakes to:

1. Identify and remove barriers to participation and wider involvement in consultation, being particularly mindful of accessibility and language needs as well as any cost impact for participants
2. Encourage the participation of the full range of organisations who may have views on a particular issue, from small informal community groups to infrastructure organisations
3. Offer support on a clear and consistent basis to those organisations that incur costs as a result of participation in consultations and wider involvement, such as infrastructure organisations and community and equality groups.

### *How to Involve*

The Public Sector undertakes to:

1. Give advance notice of at least 4 weeks (where possible) of forthcoming consultations in order to give organisations time to plan their response
2. Publicise consultations in order to obtain the greatest possible engagement from the appropriate target group
3. Support the role of membership and infrastructure organisations in facilitating engagement with the Voluntary and Community Sector
4. Respect and support the independence of the Voluntary and Community Sector
5. Consider the resource implications of consultations at the planning stage, minimise repetition and where possible stagger consultation exercises to minimise excessive burdens on organisations or sections of the community

# Involvement In Policy Development

## *How to Involve (Cont ...)*

6. Use a variety of different consultation methods that are appropriate to the intended audience and resources available. These may include written consultations, focus groups, surveys and open meetings. Be clear about the reasons for selecting particular methods and ensure that the chosen method allows participants to be open and honest
7. Be clear and open about the matters under consultation, explaining the reason behind proposals and the potential impact of any proposed outcomes. Information should be concise, in plain and relevant language and in an appropriate format. A summary should be included if the consultation document is more than four pages
8. Allow sufficient time for organisations to involve their members, beneficiaries, volunteers and trustees when preparing consultation responses, bearing in mind that smaller community groups and organisations will need more time than larger organisations with more resources
9. Allow 12 weeks for formal written consultations with consideration given to busy periods and holidays. If a shorter time frame is unavoidable, an explanation must be provided and the Voluntary and Community Sector will need to respond according to the circumstances
10. Consider carefully the impact of policies on equalities strands and where appropriate carry out impact assessments
11. Make Voluntary and Community Sector organisations aware of the consulting organisation's obligations under the Freedom of Information Act 2000 and maintain the confidentiality of consultation responses where appropriate
12. Analyse responses carefully and feed back within 3 months of completion of a consultation exercise, providing a summary of the responses and explaining how the results have influenced policy decisions.

## Commitments for the Voluntary and Community Sector

### *Effective Involvement*

The Voluntary and Community Sector undertakes to:

1. Encourage participation of Voluntary and Community organisations in consultations by publicising information through networks and mainstream and specialist infrastructure organisations
2. Support the consultation process by communicating widely with members, beneficiaries, volunteers and trustees in order to develop a comprehensive and quality response to consultations
3. Develop processes for effective engagement across the sector, in particular focusing on those organisations who have historically had little contact with the Public Sector
4. Respect the confidentiality of information supplied by the Public Sector organisation for the purposes of the consultation and be aware of the consulting organisation's obligations under the Freedom of Information Act 2000
5. Make clear within responses, whose views are represented, on what knowledge, experience or evidence they are based and how strongly they are held
6. Ensure the accuracy of any supporting evidence contained within the response
7. Give voice to the specific needs, interests or contributions of equality groups
8. Circulate and publicise feedback results from the consulting organisation.

# Allocating Resources – Part One

## Planning

### Commitments for the Public Sector

The Public Sector recognises the huge contribution of the Voluntary and Community Sector in delivering local services and providing facilities. In addition, the Voluntary and Community Sector can offer its knowledge and expertise in order to improve the effectiveness of programme planning and service design.

#### *Programme Planning and Service Design*

The Public Sector undertakes to:

1. Focus on outcomes appropriate to local needs in programme planning and service design
2. Allow potential delivery organisations from the Voluntary and Community Sector to become involved in designing proposed services based on available resources and local needs, allowing full scope for innovative solutions
3. Involve relevant sections of the Voluntary and Community Sector in the early stages of programme development
4. Consider carefully the impact of programmes and services on equalities strands and where appropriate carry out impact assessments
5. Recognise that programme and service design requires time and resources. Allow sufficient time for the process to occur, well in advance of the expected start date. Provide 4 weeks notice for development projects
6. Where possible adopt a consistent approach to programme planning and service design across departments within the same Public Sector organisation
7. Recognise the importance of providing an infrastructure to support the Voluntary and Community Sector in providing quality services. Promote infrastructure development in South Gloucestershire
8. Respect and support the independence of the Voluntary and Community Sector to determine and manage its own affairs.

#### *Selecting Finance and Funding Options*

Making the correct funding choice is fundamental to ensuring the successful delivery of programmes and services.

The Public Sector undertakes to:

1. Develop and implement a clear strategy for funding the Voluntary and Community Sector in South Gloucestershire
2. Look at the full range of financial options available, including grants, competitive procurement, loan finance, training, use of premises or a combination of these
3. Offer contracts of 3 years or longer for service commissions, in accordance with government guidelines, in order to maximise the effectiveness of the delivery. Provide a clear explanation of the reasons behind commissions of shorter periods
4. Ensure that the size and scale of the funding arrangement is appropriate to the project required.

# Allocating Resources – Part One

## Commitments for the Voluntary and Community Sector

### *Contributing to Planning and Service Design*

The Voluntary and Community Sector undertakes to:

1. Involve appropriate organisations and service users in contributing to the design and development of services and programmes
2. Be transparent about where contributions have come from and how impacted groups and communities have been represented
3. Focus on developing cost effective programmes and services delivering quality outcomes which reflect the needs of the relevant communities
4. Respect confidentiality
5. Feedback the outcomes of involvement in programme and service design to those who have contributed

# Allocating Resources – Part Two

## Commissioning

### Commitments for the Public Sector

#### *Application and Bidding Processes*

The Public Sector undertakes to:

1. Be clear, transparent and consistent in its procedures, particularly with regard to the application process, timeframes, eligibility of organisations to apply, how bids are assessed and how and when decisions will be made
2. Where possible adopt a consistent approach to programme service commissioning across departments within the same Public Sector organisation
3. Check its application and bidding processes, contracts, terms and appraisal conditions for Compact compliance and not make significant changes to these once stated
4. Ensure that the Voluntary and Community Sector have equal access to contracts and allow time and resources for the widest range of organisations to apply. Where appropriate build in additional time for partnership bids and provision of assistance in the bidding process through training or briefing sessions
5. Ensure that the application process is proportionate to the size and complexity of the project and the level of funding
6. Ensure that documents are proportionate in length to the funding allocation, contain sufficient information to allow organisations to make an informed decision on whether to bid or apply, are publicised widely and are presented in plain English and other languages where appropriate.

#### *Costs*

The Public Sector undertakes to:

1. Recognise the legitimacy and importance of costing for core functions to allow organisations to manage and administer activities effectively
2. Allow organisations to recover relevant and reasonable overhead costs for grant programmes and recognise the administrative costs involved in service delivery
3. Ensure breakdown of costs is consistent for all sectors involved in bidding for commissions
4. Recognise volunteering time as a match funded contribution and allow for costs associated with management of volunteers including management, training and reimbursement of expenses.

# Allocating Resources – Part Two

## *Commissioning and Funding Decisions*

The Public Sector undertakes to:

1. Make selections based on value for money with consideration given to quality, social impact and the value provided by the involvement of volunteers
2. Make decisions and inform applicants 3 months in advance of the expected start date. Any variances should be justified and explained
3. Provide constructive feedback to unsuccessful organisations in order to help them improve the quality of future applications.

## Commitments for the Voluntary and Community Sector

### *Making Applications and Bids*

The Voluntary and Community Sector undertakes to:

1. Ensure eligibility and ability to deliver
2. Consider carefully the impact of the project on the organisation, its mission and balance of funding streams
3. Develop clear working arrangements when working in partnerships and be clear on accountability
4. Incorporate all potential expenses into the final costing including those for management, administration and reporting.

# Allocating Resources – Part Three

## Service and Project Delivery

### Commitments for the Public Sector

#### *Delivery Terms*

The Public Sector undertakes to:

1. Discuss and agree terms prior to the signing of a financial agreement, with particular regard to:
  - a. Project deliverables
  - b. The nature, duration and value of the contract
  - c. Monitoring and evaluation
  - d. Risks
  - e. Managing performance and changing circumstances
  - f. Supporting service and organisational viability.
2. Implement a process to allow reparation within reasonable timescales in instances where service delivery outcomes are at risk, before making a decision to end a financial relationship
3. Agree how under spend will be managed
4. Refrain from making changes to agreed terms after a financial agreement has been signed, unless in exceptional circumstances and then, only if the changes are mutually agreed by all parties involved.

#### *Payments*

The Public Sector undertakes to:

1. Discuss and agree payment terms and provide a schedule of payments prior to signing of a financial agreement
2. Make payments in advance of expenditure where there is a clear need and where it represents value for money
3. Make payments within 10 days of invoices being received
4. Ensure that sub-contractors and all other public and private bodies distributing money apply Compact principles
5. Apply Compact commitments when distributing European funding.

#### *Monitoring and Reporting*

The Public Sector undertakes to:

1. Establish a joint approach to evaluation and reporting, agreeing how outcomes will be monitored as early as possible and prior to signing of a financial agreement
2. Make key targets and performance indicators for the project clear from the outset
3. Ensure that monitoring is proportionate to the nature and value of the contract
4. Be clear as to why information is requested and what it will be used for
5. Ensure that reporting requirements are not discriminatory, preventing smaller organisations from bidding

# Allocating Resources – Part Three

## *Monitoring and Reporting (Cont ...)*

6. Consider whether adequate information is available from existing management information and reporting sources before implementing additional reporting requirements
7. Encourage involvement of service users in order to cultivate a user led perspective
8. Offer feedback from assessments and monitoring.

## *Conclusion of a Financial Agreement*

The end of a financial agreement has implications for beneficiaries, the commissioned organisation and its staff and requires careful management to minimise negative impacts. Reasons for concluding agreements include:

- The end of a grant or contract period
- Decommissioning
- Changes in service user needs, where outcomes have already been achieved
- Performance not meeting agreed standards

The Public Sector undertakes to:

1. Assess the impact on beneficiaries, service users, volunteers and staff before making a decision to reduce or end funding
2. Give a minimum of 3 months notice when ending a funding relationship. Provide clear reasons for the decision and give organisations the opportunity to respond before making a final decision
3. Involve commissioned organisations in open, honest discussions in order to seek out solutions jointly when there are indications of future resource constraints.

# Allocating Resources – Part Three

## Commitments for the Voluntary and Community Sector

### *Terms and Delivery*

The Voluntary and Community Sector undertakes to:

1. Identify and mitigate the risks associated with service delivery and agree delivery and payment terms prior to signing the financial agreement
2. Where advance payment is required, explain why it is needed
3. Ensure robust governance arrangements are in place and that those concerned are fully informed of the terms of delivery
4. Acknowledge public sector support in publicity and operations
5. Provide effective and suitable systems for the management and audit of finances, including adequate insurance cover to meet all legal obligations and comply with the accounting standards and guidance from the Charity Commission where appropriate
6. Ensure quality service delivery and outcomes in accordance with the agreed terms
7. Operate good practice policies such as child protection, health and safety, equalities, safe recruitment, safeguarding children and adults, etc
8. Recognise that reliance on a single source of funding is unsafe
9. Endeavour to adopt a flexible approach to requests for project adjustments during the delivery term provided that they do not breach the terms of the contract or impact negatively on the delivery organisation, unless by mutual agreement.

### *Monitoring and Reporting*

The Voluntary and Community Sector undertakes to:

1. Discuss and agree monitoring and reporting requirements prior to signing a financial agreement
2. Ensure that systems are in place to supply required information, be honest and transparent in reporting and provide early notice of significant changes in management, finances and risks
3. Deliver quality assurance and accountability to service users including complaints procedures and the involvement of users in the development management of activities and services
4. Share where possible, statistics and other information which may benefit other groups or communities.

### *Conclusion of a Financial Agreement*

The Voluntary and Community Sector undertakes to:

1. Plan for the end of funding to reduce any impact on service users and the organisation
2. Contribute to service or programme reviews.

# Achieving Equality

The Public and Voluntary and Community Sectors share an essential role in achieving equality and fairness for everyone, regardless of background. Working in partnership, the sectors need to tackle and eliminate discrimination and promote equality of opportunity whether through inclusiveness or the development of services which help disadvantaged groups to play a full part in the community. Key areas of focus include the seven equality strands:

- Age
- Disability
- Gender
- Race
- Religion or belief
- Sexual orientation
- Transgender.

Sectors need to consider carefully the impact of policies and services on all these strands, as well as complying fully with the race, gender and disability duties which exist in equality law. Although there are many equality organisations within South Gloucestershire who represent, act as advocates and provide services for these strands it is important that sufficient robust support is available across the board.

The Public and Voluntary and Community Sectors need to work together in ensuring that policies, systems and practices in South Gloucestershire contribute successfully to achieving equality goals and in ensuring that people and groups are not unfairly discriminated against.

The implementation of the new single Equality Bill due to come in force in late 2010 will also present a significant challenge to all sectors. As well as bringing disability, sex, race and other grounds of discrimination within one piece of legislation, the Bill also includes some major changes to disability discrimination law. Partners from all Sectors will need to work closely together to ensure that the necessary changes are effectively introduced.

## Commitments for the Public Sector

### *Tackling Discrimination and Promoting Equality*

The Public Sector undertakes to:

1. Develop, in conjunction with relevant equalities organisations, a strategy for working effectively with the Voluntary and Community Sector on equality and diversity issues and in meeting its duties under equality law
2. Work together with the Voluntary and Community Sector to understand the specific needs of people from equality groups and to design programmes and services which can accommodate those needs
3. Undertake equality impact assessments in advance of all relevant policy and funding decisions
4. Promote the work and activities of equality groups in the Voluntary and Community Sector and support partnership working
5. Ensure that equality organisations have fair and equal opportunities to access funding
6. Ensure that people from equality groups have equality of access to quality services and employment
7. Give equal weighting to all equalities interests and ensure that this is reflected in practice

# Achieving Equality

## *Tackling Discrimination and Promoting Equality (Cont ...)*

8. Incorporate clear equalities goals and actions within the terms for delivery of service commissions and programmes. Help delivery organisations be aware of their duties under equality law
9. If withdrawing a strategic grant from an equality organisation, evaluate the impact and consider whether the funding can be re-allocated to another organisation in the same part of the sector
10. Work with the Voluntary and Community Sector to remove barriers to and encourage and develop volunteering for equality groups.

## *Representation*

The Public Sector undertakes to:

1. Invest in the development of stronger representation at all levels (though particularly at a strategic level), ensuring that equality groups are represented on partnerships and boards which make decisions that affect them
2. Recognise, value and promote the work of organisations which involve or serve specific equality groups
3. Enable equalities organisations to participate in policy development, consultation, programme and service design and other activities by providing appropriate support and helping them to build their capacity to engage
4. Provide a broad range of funding options to support these organisations
5. Recognise the nature of organisations representing people from equality groups (often small informal groups with limited capacity) when planning activities and consultations which involve them.

## **Commitments for the Voluntary and Community Sector**

The Voluntary and Community Sector undertakes to:

1. Work with the Public Sector to eliminate discrimination, promote equality of opportunity and to build community cohesion across diverse groups
2. Develop the capacity of organisations throughout the sector to uphold and reflect equality undertakings in governance and operation
3. Develop strong infrastructure organisations that can represent the interests of equality groups
4. Develop robust engagement processes to ensure the appointment of suitable representatives on partnerships and boards at a strategic level and be clear on where views have come from, how they have been gathered and their legitimacy
5. Take steps to develop mechanisms to identify and facilitate the engagement of under represented groups.

# Implementation and Monitoring

Organisations across both sectors have a responsibility to ensure that the best practice guidelines outlined in the Compact are promoted, applied and observed. Signing up to the Compact demonstrates a clear commitment to this process and those organisations who have signed up share ultimate responsibility for ensuring that the Compact is successfully implemented and monitored.

## Compact Monitoring and Oversight Group

In addition, on a more formal basis, the Compact Monitoring and Oversight Group meets at least twice a year and is made up of representatives from both sectors. This group will:

- Oversee implementation of the Compact
- Monitor adherence to Compact best practice commitments
- Take action in response to emerging issues
- Help to resolve any Compact related disagreements between partners as outlined in the Dispute Resolution Process
- Undertake an annual review of the Compact, to consider how its impact and effectiveness can be improved.

Details of members of the Compact Monitoring and Oversight Group can be found at:

[www.cvs-sg.org.uk/south-gloucestershire-compact/](http://www.cvs-sg.org.uk/south-gloucestershire-compact/)

## When Things Go Wrong

The stronger the relationship between the sectors and the earlier that both sectors become involved in planning, commissioning and delivery of services, the less likely that conflicts will arise. However, there will be times when issues arise between organisations which may relate to the Compact principles stated in this document. In these cases, it is recommended that the organisations involved follow the Dispute Resolution Process on the following page. The Compact Monitoring and Oversight Dispute Resolution Panel will only be available to those organisations who have signed up to the Compact.

# Resolving Disputes

The following Dispute Resolution Process will be followed:

