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Portsmouth
CITY COUNCIL

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Portsmouth City Council

**Voluntary and Community Sector
Framework**

(Incorporating the Portsmouth Compact)

Section 1

Portsmouth City Council

Voluntary and Community Sector Framework

Executive Summary

This framework sets out how the council intends to work with the local Voluntary and Community Sector to achieve better outcomes for local people. It builds on the work the council has been doing with the Voluntary and Community Sector in the past and reflects emerging national policies and developments.

The Framework builds on the foundations for the implementation of the Portsmouth Compact, the delivery of the Community Plan, the design and delivery of the Local Area Agreement, and the development of the role for the Voluntary and Community Sector in delivering and shaping excellent public services.

It is applicable to all Statutory and Voluntary and Community Sector organisations. It is particularly aimed at Portsmouth city council senior managers, members, staff and trustees who may be engaged in the design or approval of policies and services.

The Voluntary and Community Sector is vital to the prosperity and well being of Portsmouth. It has a long tradition of providing services directly to the community and specific client groups and has built a reputation for diversity and innovation. It makes a valuable contribution to the economic and social regeneration of the city, which the council where possible wishes to maximise.

The aims of this framework are to:

- Ensure meaningful **strategic engagement**, understanding and partnership working between the council and the Voluntary and Community Sector.
- Increase the role and scope of the Voluntary and Community Sector in **service provision and delivery** while respecting the independence of Voluntary and Community Sector organisations.
- Contribute to **service improvements and the regeneration** of Portsmouth.
- Encourage other statutory organisations to embrace **partnership working** in the spirit of the Portsmouth Compact, by signing up to the Compact and working in partnership within it to deliver the Community plan, and develop and improve local service delivery.
- Provide a framework for supporting and developing a vibrant and sustainable Voluntary and Community Sector in the city.

The council will ensure that there are strategic and operational linkages between the Voluntary and Community Sector framework and other corporate strategies. The Voluntary and Community Sector framework will thus be linked to the council's corporate plan. This will enable the council to continue to move forward in a measured way, reviewing priorities and progress with the Voluntary and Community Sector as part of a programme of increased engagement.

The framework is supported by the Partnership Improvement Action Plan produced by a group of senior officers and practitioners within the public and the voluntary and community sector which participated in the IDeA/IVAR Partnership Improvement Programme (PIP) during 2010.

Key partners who will be invited to support the implementation of this framework are:-

- Community First For Portsmouth
- LSP's Community Involvement Partnership Board (CIPB),
- The Third Sector Leadership group
- Portsmouth Third Sector Development Consortium
- Compact Review group
- Community Network
- Providers Network
- PCC third Sector Commissioning Network

1. Introduction

This Framework sets out how the council intends to work with the local voluntary and community sector. It builds on the work the council has been undertaking with the voluntary and community sector in the past and lays good foundations to respond to emerging national policies and developments following change in national government.

In recent years nationally, the government has introduced a wide range of drivers to strengthen the role of the Voluntary and Community Sector in service delivery. It has introduced capacity building programmes to ensure that the Voluntary and Community Sector is further developed and sustained as a deliverer of local services.

Locally, the council has a long history of supporting, working and consulting with the local Voluntary and Community Sector. Its focus for development in the past few years has been on building the capacity of the voluntary and community sector to take on a bigger service delivery role and to deliver to higher standards. This work was developed initially through the Portsmouth Local Area Pathfinder (building public service partnerships with the voluntary and community sector). The multi-agency Partnership Improvement Programme has continued this work and a Third Sector Leadership Group will now be responsible for ensuring its implementation.

The council recognises the Voluntary and Community Sector's role in:

- Local governance through active citizenship, civil renewal and economic regeneration
- The design and delivery of Innovative, flexible and accessible services
- Strong and active participation in the Local Strategic Partnership
- Volunteering and the role of small voluntary and community groups and community service
- Public service delivery
- Voice for local communities in Lobbying, campaigning and influencing policy

The framework is applicable to all statutory and voluntary and community sector organisations. It is particularly aimed at senior managers, members, staff and trustees who may be engaged in the design or approval of policies, strategies, and commissioning of services.

The council will:

Continue to work with the voluntary and community sector through the Customer Community and Democratic Services, voluntary sector team, the Community Involvement Partnership board, the Third Sector Leadership Group and the local infrastructure organisation Community First for Portsmouth. It will seek new and innovative ways to support the voluntary and community sector in helping deliver the Portsmouth vision and proactively identify opportunities where the voluntary and community sector can take a leading role.

In addition, the council intends to work with the voluntary and Community sector and local infrastructure organisations to develop tools and methodologies for measuring the contribution and impact of the voluntary and community sector in realising the Portsmouth vision, supporting the council and LSP priorities

The council will encourage all statutory organisations, particularly those that are part of the Portsmouth Local Strategic Partnership, to adopt the principles of this framework, the Portsmouth Compact and the associated codes of good practice in order to deliver the shared vision for Portsmouth.

The LSP meeting in Jan of 2010 approved principles to guide funding decisions by LSP organisations in Portsmouth, those principles are represented in this framework

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2. The Voluntary and Community Sector in Portsmouth

The voluntary and community sector is vital to the prosperity of Portsmouth. It makes a valuable contribution to the economic and social life of the city. It plays a key role in:

- Building 'social capital', both by promoting self-organised community and collective action and by encouraging volunteering and active citizenship
- Providing services to local people and to particular groups in the community, thereby meeting social and individual needs
- Advocacy on behalf of communities and the individuals they serve and represent, for example through campaigning and lobbying activities or formal representation in decision-making forums
- Contributing expertise and experience to policy formulation, through dialogue with the council and the wider statutory sector
- Providing employment and income, thereby contributing to overall economic output
- Delivering public and publicly-funded services and offering greater customer/consumer choice

The voluntary and community sector comprises organisations that:¹

- Are non-statutory
- Are 'value-driven' – that is, they are primarily motivated by the desire to further social, environmental or cultural objectives rather than to make a profit *per se*
- Principally reinvest surpluses to further their social, environmental or cultural objectives

¹ Exploring the role of the Voluntary and Community Sector in public service delivery and reform
- HM Treasury (February 2005)

For the purpose of this framework, the Voluntary and Community Sector includes:

'All Independent voluntary or community groups which are often registered charities. It includes religious organisations that are involved in community work. Organisations that only make profits to support growth, such as social enterprises and co-operatives, may also be considered part of the Voluntary and Community Sector.'

Voluntary and Community Sector organisations generally have a clear purpose that is relevant to local people and includes a community development role'²

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3. Aims of the Framework

The aims of this framework are to:

- Ensure meaningful **strategic engagement**, understanding and partnership working between the council and the voluntary and community sector.
- Support the role and scope of the voluntary and community sector in **service provision and delivery** while respecting the independence of Voluntary and Community Sector organisations.
- Contribute to **service improvements and the regeneration** of Portsmouth.
- Encourage other statutory organisations to embrace **partnership working** in the spirit of the Portsmouth Compact, by signing up to the Compact and working in partnership within it to deliver the community strategy.
- Promote **equity, equality, diversity** and fair access for Black and Minority Ethnic organisations, those representing disabled people, women and other socially excluded groups; and for the people they represent.
- Provide a framework for supporting and developing a vibrant voluntary and community sector in the city.

4. Strategic Engagement

The council is developing mechanisms, which will allow it to identify and properly engage with as many active Voluntary and Community Sector organisations within the city as possible. It seeks to improve dialogue with the Voluntary and Community Sector and increase opportunities for groups to engage with the council.

The council will seek to rationalise, improve and co-ordinate its consultation and engagement methodologies in the context of the Portsmouth Local Strategic Partnership following the review of the voluntary and community sector engagement model in April 2010. This will make it easier for the voluntary and community sector to be heard on matters of importance to them. It will provide an even stronger focus on developing strategies to engage with traditionally harder to reach groups, and faith groups.

The council seeks to build mutual trust and a deeper understanding within the council itself and the Voluntary and Community Sector of the issues and concerns on both sides. To develop this the council will work with leaders in the voluntary and community sector, the local infrastructure organisations and forums (e.g. Community First for Portsmouth, the Community Empowerment Network and Faith Forums) to involve service users, residents and communities

5. Service Provision and Delivery

The council's aspirations are firmly rooted in a desire to improve the quality of life for people living and working in Portsmouth and to ensure performance and sensitivity of services delivered to local people.

The council recognises that by engaging the voluntary and community sector in the design and delivery of services the voluntary and community sector can sometimes bring additional benefits, for example by:

- Involving local people to build community 'ownership'
- Building the skills and experience of volunteers – especially young people
- Increasing trust within and across communities, thereby building social capital
- Making use of voluntary and community sector information and community intelligence

The council is seeking to improve the performance of public services in co-operation with stakeholders and the community whilst ensuring that the use of public funds is accountable, transparent and conducted with probity. It will seek to support organisations that have the capacity to become partners in the delivery of excellent public services for local people.

The council recognises that for many of its services there is a clear choice about how they can be delivered and the fundamental tests will be performance and value for money. It regards the voluntary and community sector as a key partner in a mixed economy of local public services provision, alongside the public and private sectors.

In order to develop the role of the voluntary and community sector in the delivery of excellent public services, **the council will:**

- Aim at all times to establish a fair balance between performance and longer term impact and cost efficiency in seeking to provide excellent public services – accessible to all.
- Continue to support the voluntary and community sector to improve social capital and public services. It will agree outputs, outcomes and longer-term impacts to use as evidence of its investment.
- Continue the process of moving away from the traditional grant aid and increasingly seek to develop a robust and consistently monitored commissioning approach, which is transparent, fair and performance focussed including a range of funding mechanisms including grants, contracts and support in kind.

- Assist the voluntary and community sector where possible to increase the volume of service delivered by the voluntary and community sector as it believes that, at its best, the voluntary and community sector is very well placed to deliver excellent public services – accessible to all.
- Assist the voluntary and community sector to engage with the Joint needs strategic assessment and total place.

To achieve this council will:

- Scrutinise every service as part of its existing annual strategic and service planning processes to see whether it could benefit from greater involvement of the voluntary and community sector.
- Actively consider the role of the voluntary and community sector in meeting any gaps in services or new demands that arise.
- Identify new service areas for potential commissioning opportunities with the voluntary and community sector as part of its forward planning arrangements.

The Council seeks to secure the excellence that can be achieved by the voluntary and community sector through engaging organisations that can demonstrate:

- Value for money
- The relevant knowledge and experience and skills
- The capacity to deliver service improvements and to sustain these improvements
- Proper safeguards to secure financial and organisational propriety
- That they do not place the council at unacceptable risk

6. Service Improvements and Regeneration

The council accepts its community leadership role in driving forward service improvements and regeneration and delivering against the challenges that lie ahead. Its own contribution to realising this ambition rests in its role and responsibilities as:

- A purchaser of goods and services (the economy)
- The local education authority and one of the largest employers in the area (people)
- The local planning authority (places)
- The custodian of local assets and land marks (marketing)

The council will:

Use these statutory delegations to encourage the development of the voluntary and community sector and the role of social enterprise in delivering this ambition. It believes that by combining business acumen with the strengths of the voluntary and community sector, including social enterprise helps to create a strong, sustainable and socially inclusive local economy.

The local voluntary and community sector also adds value to the mainstream economy - particularly by providing services to disadvantaged communities, bringing external funding into the city.

The council sees commissioning as a core capacity building strategy and will continue to support the growth of social enterprise. It will further encourage LSP partners to provide business support to social enterprise effective assistance and professional support to develop its role in regenerating the city.

7. Partnership Working

The council will:

Seek to actively promote and facilitate collaborative and partnership working between the statutory sector and the voluntary and community sector in order help to deliver the goals set out in the community strategy.

The council will be further developing opportunities for involving the voluntary and community sector as a partner in the delivery of national priorities and targets within the contexts of the Local Area Agreement.

The council wishes to go beyond a minimal approach of complying with government requirements for involvement and engagement to developing innovative partnerships with the voluntary and community sector as part of its strategy for building social capital and community involvement, developing social enterprise, and combating social exclusion.

The council's aim is to improve the quality of public service delivery and create new and powerful relationships for the benefit of local people. This includes involving and engaging with local people in new and innovative ways, as part of developing community self governance and citizenship.

Organisations may not wish to become partners of the council. It recognises the significant role retained by these organisations, and will ensure that they are consulted, involved and informed about matters which affect them.

A Statement for Partnership Working in Portsmouth

The Portsmouth Compact outlines the relationship between local statutory and the voluntary and community sector, allowing them to work together more effectively to strengthen communities and improve people's lives. While there are many differences between public and voluntary sectors, which must be acknowledged and respected – the sectors have much in common.

In particular, the public sector and the voluntary and community sector share a common set of principles, which are at the heart of what they are both trying to achieve. These principles make it clear that the Portsmouth Compact is neither a set of rules not a bureaucratic burden, but a way of working that can help deliver real outcomes and improvements for people and communities. These principles have been created to help the local statutory and voluntary and community organisations build relationships and work together effectively in partnership. The Portsmouth Compact put these shared principles into practice

Shared Principles for working together:

Respect: Statutory and voluntary and community organisations are accountable in different ways, but both need to act with transparency and integrity. Effective partnerships are built on mutual understanding and an appreciation of the difference between partners of the Compact.

Honesty: It is only through open communication that strong partnership can be built and maintained. Full and frank discussions should be the basis for resolving difficulties.

Diversity: The Statutory sector and the voluntary and community sector value a thriving civil society, which brings innovation and choice through a multitude of voices.

Equality: Fairness for everyone, regardless of their background, is a fundamental goal, and statutory and voluntary and community sector will work together to achieve this.

Citizen Empowerment: By working together, statutory and voluntary and community sector can deliver change that is built around communities and people, meeting their needs and reflecting choices.

Volunteering: The energy and commitment of people giving their time for the public good contributes to a vibrant society, and should be recognised and appreciated.

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8. Equity, Equality and Diversity

Priority 9 of the Vision for Portsmouth clearly puts equality and diversity on the local agenda

“Celebrate the many diverse and different communities within Portsmouth and work together to create an inclusive city for everyone”

We are committed as an organisation to ensure that the Council’s approach to equality and diversity primarily focuses on our customers to ensure that our services meet people’s needs, both now and in the future. For the council, this means all our customers in all our communities. We are working towards making our services more accessible by planning ahead and taking action based on listening to and involving our communities. Our aim is to have a workforce that is reflective of the communities in Portsmouth, and is open to new ideas, ways of working and diversity”.

The council recognises that there are barriers and constraints faced by the voluntary and community sector in developing its full service delivery role. It also acknowledges that marginalised and disadvantaged/ discriminated groups not only experience the same barriers and constraints as the majority voluntary and community sector but more acutely. In addition, these organisations also face specific constraints such as a being part of a less developed sector and external constraints in the form of discrimination and disadvantage.

The council will continue to work with voluntary and community sector organisations (focusing particularly on those organisations consisting of and representing marginalised and/or disadvantaged/discriminated against communities) to build more effective partnerships, establish clearer mechanisms for consultation with such groups, and unlock the expertise and skills of these groups by commissioning new and innovative approaches to the delivery of services to marginalised and disadvantaged/discriminated against communities.

9. Building Voluntary and Community Sector Capacity

Building the capacity of the voluntary and community sector is about ensuring organisations have the skills, knowledge, infrastructure and resources in place to realise their full potential.

The council will continue to support and further develop a vibrant and sustainable voluntary and community sector so that it can carry on building social capital. An active and vibrant voluntary and community sector is one in which groups and organisations are mobile and able to develop and grow to meet changing local needs.

Through its approach to the development of the voluntary and community sector, the council hopes to create opportunities for local people to be involved with groups and organisations to develop skills and knowledge to enhance their life chances and employment prospects.

The council will work to develop a wider understanding about the changing roles of the voluntary and community sector and the local authority. It will work to shift central control towards shared leadership and management based on merit, capacity and the willingness to shoulder and share responsibility.

The council will use a range of approaches to developing the capacity of the voluntary and community sector. It recognises the need for investment to assist in building capacity and to help some organisations meet additional requirements.

It will utilize its community leadership, service provider, purchaser and funder roles to involve, engage and develop the Voluntary and Community Sector. Specifically, the council will help build the capacity of the voluntary and community sector through commissioning, community development, providing funding, and assisting in accessing external support.

(i) Commissioning

The council is clear that greater involvement of the voluntary and community sector in public service delivery is about the delivery of value for money, quality services as well as ensuring the financial security and stability of voluntary and community sector organisations themselves.

It is also about designing and delivering services in ways that play to voluntary and community sector strengths and about developing the skills, knowledge and resources of voluntary and community sector organisations to take advantage of the opportunities to engage with the public sector if they choose to do so.

The council will work with the Voluntary and Community Sector to:

- Help it access external funding and central government capacity building resources to develop its service delivery role

- Improve knowledge within the wider statutory sector of the rationale for voluntary and community sector involvement in public service delivery
- Challenge any misunderstandings and misrepresentations about the role of the voluntary and community sector in public service delivery
- Target key stakeholders to encourage greater involvement of the voluntary and community sector in public service delivery

The council will continue to support the service delivery role of voluntary and community sector organisations, which are locally governed and employ local people by reducing the initial barriers to entry. It will provide renewed focus to breaking down both internal and external barriers that voluntary and community sector organisations face in winning public sector contracts.

(ii) Community Development and Cohesion

The council recognises the importance of developing social capital and community cohesion in the city. It sees the social benefits of enabling communities to develop a common vision and a sense of belonging where people from different cultures and backgrounds feel valued for the part they can play in making their community a better place to live, work and socialise.

The council already has examples of strong neighbourhood management arrangements in place and will seek to use these to strengthen communities and build community cohesion in local neighbourhoods. It will specifically work at promoting greater knowledge, respect and contact between different communities; and establishing a greater sense of citizenship among local people.

As part of its local community leadership role, the council will continue targeting efforts to build strong, sustainable community anchor organisations which can provide a crucial focus and support for community development and change in their neighbourhoods and communities.

(iii) Funding

The council recognises that grants form a major part of the financial relationship between the council and the voluntary and community sector, and a vital element of many voluntary and community Sector organisations' funding. Although grants play a significant role, the council will move to ensure that public resources are only used where this is the most appropriate form of funding.

The council will continue its work in developing a more stable and effective funding relationship with voluntary and community sector organisations, based on the principles of simplicity and proportionality, and on commonality and co-ordination as defined in the Compact.

Through this framework, the council will:

Specifically address the four key concerns identified in the Government's guidance to funders on improving funding relationships for voluntary and community organisations.³ Namely,

- Full cost/price - ensuring that voluntary and community sector service providers include the appropriate level of overhead (or "core") costs associated with the provision of a particular service
- Streamlining access - and performance management requirements for multiple, and often very small, funding streams
- Stop End loading of payments - recognising that payment arrears often result in the voluntary and community sector bearing the upfront costs of borrowing and the risks this entails
- Stability in the funding relationship - tackling the lack of long term funding arrangements and planning by moving from one year funding to two or three year funding arrangements under service level agreements focused on outcomes, where appropriate and possible

The grants process itself will continue to be further developed to implement the commitments contained in the Portsmouth Compact.

The council will continue to seek to maximise funding and inward investment opportunities that are in line with its priorities. It will assist the voluntary and community sector by providing clear information about its own and other national funding regimes and by supporting relevant applications to succeed.

(iv) Accessing External Support

The council recognises that the local voluntary and community sector needs external support in addressing some of its core capacity needs. It also recognises that much of this support would best be delivered through the local infrastructure organisation (Community First for Portsmouth)

The council will:

Work with national and regional agencies and the local statutory sector to support a capacity building programme (identified in the local infrastructure development plan) that focuses on generic gaps in the areas of:

- (i) Leadership and workforce development
- (ii) Governance and volunteers development

³ Guidance to Funders: Improving funding relationships for voluntary and community organisations – HM Treasury (September 2003)

- (iii) Technical assistance, business support, administration, marketing, and performance management
- (iv) Information and Communications Technology (ICT)
- (v) Fundraising and income generation

The council will proactively seek inward investment opportunities for the local voluntary and community sector and support Voluntary and Community Sector organisations to secure capacity building support through existing and future national programmes.

In addition, it will work to attract national capacity building initiatives to be piloted locally, where appropriate.

10. Implementing the Framework

The council will ensure that there are strategic and operational linkages between the voluntary and community sector strategy and other corporate strategies.

11. Action Plan

To be developed with the third sector leadership group to support the implementation of this strategy, and incorporating the Partnership Improvement Action Plan (Appendix A)

Section 2

PCC Voluntary and Community Sector Framework

The Portsmouth Compact Commitments

Involvement in policy development

Voluntary and community organisations have expertise in many areas, often because they work directly with people and groups on the ground. This allows them to understand the needs of their beneficiaries and provide new and effective answers to problems. Involving and consulting the voluntary and community sector can help statutory authorities develop policies that meet the needs of people and communities.

Involving the voluntary and community sector in policy development is a continuous process right from the earliest stages of policy development. It includes a range of methods – from informal engagement to full-scale public consultation.

Commitments for statutory sectors

1. When to involve

Involving the voluntary and community sector in policy development at the earliest stages of policy development at the earliest stage possible will allow statutory sector to get the most out of the process. This will lead to more effective policies and programmes being developed.

Statutory Sector undertakes to:

- 1.1 Involve the voluntary and community sector from the earliest stages of policy development, on all relevant issues likely to affect it. This can include empowering voluntary and community organisations to start discussions within affected communities themselves.
- 1.2 Inform the sector of progress in developing policy.
- 1.3 Identify implications for the voluntary and community sector when assessing the impact of new policies, legislation and guidance.

2. Who to involve?

Spending time and resources helping voluntary and community sector organisations makes their voices heard helps ensure that their knowledge can contribute to policy development.

Statutory Sector undertakes to:

- 2.1 Identify and remove barriers, such as language barriers, which may prevent voluntary and community organisations from contributing to policy development.

- 2.2 Encourage and facilitate responses from the full range of voluntary and community organisations that are likely to have a view.
- 2.3 Support the development of voluntary and community sector infrastructure. Infrastructure bodies enable voluntary and community organisations to help people and communities effectively, through services such as capacity building, representation and other forms of support.
- 2.4 Identify where there are costs to voluntary and community sector organisations as a result of partnership work with the statutory sector and offer support on a clear and consistent basis. This can be especially important for infrastructure bodies that are helping to organise or run consultations.

3. How to Involve?

Voluntary and Community Organisations can provide stronger and better-informed responses if the consultations methods used are suited to the purpose and audience, and if enough time is given for people to respond. Either formal or informal consultation methods may be appropriate depending on the circumstances and on the type and size of organisation.

Statutory Sector undertakes to:

- 3.1 Avoid compromising or undermining the independence of the voluntary and community organisations (whatever financial or other relationship exists between them).
- 3.2 Give notice of forthcoming consultations so that organisations can plan ahead.
- 3.3 Publicise consultation exercises widely and make sure they are accessible to the people they are intended to reach.
- 3.4 Use a variety of different consultation methods and explain the reasons for selecting them.
- 3.5 Explain which matters are open to change as a result of the consultation and which are not. Provide feedback to explain how respondents have influenced policy decisions, including where respondents views have not been acted upon.
- 3.6 Allow enough time for voluntary and community organisations to involve their service users, beneficiaries, members, volunteers and trustees in preparing responses.
- 3.7 Conduct 12 week formal written consultations where possible, providing an explanation for shorter time frames.
- 3.8 Make voluntary and community organisations aware the consulting organisation's obligations under the Freedom of Information Act 2000. Where appropriate protect the confidentiality of information that has been supplied by a voluntary and community organisation for the consultation.

Commitments for the voluntary and community sector

4. Effective Involvement

When the voluntary and community sector engages actively in policy development, it helps build the statutory sector's trust in the sector, establishing valuable links between the two sectors and encouraging the statutory sector to commit actively to listening to voluntary and community sector views.

Voluntary and Community Sector Undertake to:

- 4.1 Involve service users, beneficiaries, members, volunteers and trustees when preparing responses to consultations.
- 4.2 Give feedback on what information is presented to statutory sector and what the outcome is to everyone involved in responding to the consultation
- 4.3 Be clear about whose views are being represented and what those views are. This includes explaining whether views have been gathered directly (and from what audience), or whether the response is based on the organisation's knowledge and experience of the issues.
- 4.4 Make sure all research and information that is presented to statutory sector is accurate and credible. Explain where the information comes from and if there is conflicting evidence.
- 4.5 Be aware of the consulting organisation's obligations under the Freedom of Information Act 2000. Where appropriate, respect the confidentiality of information that has been supplied by statutory sector for the consultation.
- 4.6 Promote statutory sector consultations across the voluntary and community sector, where appropriate.
- 4.7 Accept that, in rare cases, consultations may need to take place in shorter time-frames than 12 weeks.

Allocating Resources

Voluntary and community organisations, including those that receive no public funding are often in a good position to understand what people want and how their needs can be met. By working together and co-designing programmes, government and voluntary and community organisations can deliver policies and programmes that are built around communities and individuals, meeting their needs and reflecting their choices.

(This section reflects good practice in commission, and is relevant to the entire commissioning cycle. It is consistent with, and reflected in, the following publications:

- HM Treasury, Improving financial relationships with the third sector: guidance to funders and purchasers, May 2006
- National Audit Office, Financial relationships with third sector organisations, a decision support tool for public bodies in England, May 2006
- HM Treasury, Managing public money, October 2007
- National Audit Office, Intelligent monitoring, June 2009
- Cabinet Office, Principles of proportionate monitoring and reporting

Commitments for Statutory Sector

5. Planning

Voluntary and community organisation are often in a good position to understand people's need and to provide innovative solutions to those needs. Involving voluntary and community organisations in designing new programmes and services, and focussing on results, can help statutory sector provide the right resources, identify risks and solutions, and achieve better outcomes. When done appropriately, this does not affect competitive neutrality.

Statutory Sector undertakes to:

- 5.1 Plan new programmes and services with a focus on outcomes, providing scope for innovation wherever possible.
- 5.2 Work with voluntary and community organisations to understand public service reform and support the sector to changes
- 5.3 Begin planning programmes and services well in advance of the expected start date, based on consultation with the voluntary and community sector.
- 5.4 Ensure that those voluntary and community organisations that are likely to have a view on the programme of service are involved from the beginning.

6. Choosing finance and funding options

Choosing the most appropriate funding mechanism will help to secure the most appropriate organisation to deliver the outcomes.

Statutory Sector undertakes to:

- 6.1 Consider different ways of funding organisations working with statutory sector. These methods could include grants, procurement, loan finance, training, use of premises or other support. A clear rationale should be provided for the decision.
- 6.2 Ensure that the size and scale of the funding arrangement reflects the project's objectives and attracts those organisations best placed to deliver the required outcomes
- 6.3 Advocate that prime and sub-contractors and all other public and private bodies distributing public money work within the Compact by making it a requirement of funding arrangements.
- 6.4 Apply the Compact when distributing European funding. Where conflicts arise with European regulations, discuss the potential effects and possible solutions with the voluntary and community organisations.

7. Application and bidding processes

A well-managed application process that is proportionate to the desired objectives will encourage a diverse range of organisations to apply, helping to ensure that the most.

Statutory sector undertakes to:

- 7.1 Ensure that application documents are:
 - Publicised widely
 - Proportionate to the nature of the risk and amount of funding being allocated
 - Contain enough information to allow organisations to make informed decisions
- 7.2 Require the application and bidding processes are consistent with overarching guidance on public procurement.
- 7.3 Allow enough time for organisations of all sizes to apply, as well as for consortia and partnership working bids.
- 7.4 Be clear about how bids will be assessed.
- 7.5 Make decisions on the basis of value for money. This may include taking into account the wider community benefits at the award stage or when identifying procurement needs.

8. Understanding costs

Funding bodies have an interest in ensuring that organisations can manage and administer their activities effectively. Support functions are vital to achieving this.

Statutory sector undertakes to:

- 8.1 Recognise that it is appropriate to include reasonable relevant overhead and administrative costs in applications.
- 8.2 Accept the recovery of costs associated with volunteering, such as managing volunteers and reimbursing expenses.
- 8.3 Be consistent across sectors when requesting cost breakdowns from organisations.

9. Making Decisions

Award criteria should be designed to allow the funder to select the provider that is best placed to achieve best value for money.

Statutory Sector Undertake

- 9.1 Commit funding for three years or more. If this is not the best way to deliver the best value for money, statutory sector should explain

clearly, what alternative funding arrangements could deliver the same outcomes.

- 9.2 Make funding decisions and inform organisations at least three months in advance of the expected start date. Any departure from that time-scale should be justified and explained.
- 9.3 Provide constructive feedback to unsuccessful organisations.

10. Agreeing the delivery terms

Agreeing terms in advance ensures a clear and shared understanding of respective responsibilities and allows the organisations involved to focus on delivery.

Statutory Sector undertakes to:

- 10.1 Discuss the risks of the project and agree delivery terms before a financial agreement is signed.
- 10.2 Allocate risks to the organisation(s) best equipped to manage them. Ensure that delivery terms and risks are proportionate to the nature and value of opportunity.
- 10.3 Agree a process for managing performance and responding to changing circumstances before signing a financial agreement.
- 10.4 For grants, agree how under spend will be managed.

11. Making Payments

Payment terms which suit the type of service and the organisation involved will increase the likelihood of the desired outcomes being achieved.

Statutory Sector undertakes to:

- 11.1 Make payments in advance of expenditure where there is a clear need and where this represents value for money. This may be particularly relevant for grants.
- 11.2 Make payments within 10 working days of invoices being received.

12. Monitoring and reporting

Appropriate monitoring reduces costs, time and resources for both sides, and means that time and effort can be focussed on delivering results.

Statutory sector undertakes to:

- 12.1 Discuss and agree how outcomes will be monitored before a contract of funding agreement is signed
- 12.2 Be clear about what information is being requested, why, and how it will be used.

- 12.3 Ensure that monitoring and reporting is proportionate to the nature and value of the opportunity. Focus on evidence that is meaningful to the beneficiaries of organisations, as well as to funders.
- 12.4 Consider how service users can be involved by getting their perspective of performance
- 12.5 Aim to standardise monitoring and reporting arrangements.
- 12.6 Ensure that monitoring is consistently applied to organisations in all sectors
- 12.7 If the project is encountering problems, discuss and agree a timetable of actions to improve performance before making a decision to end a financial relationship

13. Concluding a financial relationship

It is important to plan ahead for the end of funding, in order to reduce its negative impact on the people involved, the stability of the voluntary and community organisation and future partnerships.

Statutory Sector undertakes to:

- 13.1 Assess the impact on beneficiaries, service users and volunteers before deciding to reduce or end funding.
- 13.2 Where there are restrictions on future resources, discuss the potential implications as early as possible with voluntary and community organisations.
- 13.3 Give a minimum of three months notice in writing when ending a funding relationship or other support and provide a clear rationale for why the decision has been taken.
- 13.4 Give organisations an opportunity to respond to the end of funding and consider the response before making a final decision.
- 13.5 Review programmes and services with relevant voluntary and community sector organisations to inform future practices.

Commitments for the voluntary and community sector

14. Contribution to planning

When voluntary and community organisation contribute to the planning and design of programmes and services, it helps ensure that they reflect the need of beneficiaries.

Voluntary and community organisations undertake to:

- 14.1 Involve users, beneficiaries, members, volunteers and trustees when designing or reviewing programmes and services.
- 14.2 Provide feedback to contributors on information to contributors on information that is presented to statutory sector and on what the outcomes are.
- 14.3 Be clear about whom they are representing, in what capacity, and on what basis they are making the representation.

15. Making applications and bids

Organisations should ensure that they are eligible to apply for funding and should check the objectives of the funding programme of service are in line with the organisation's mission before applying.

Voluntary and community organisations undertake to:

- 15.1 Be clear on their reasons for bidding or applying to deliver programmes or services
- 15.2 Show that they understand how new funding will impact on their organisation, relate to its mission, and contribute to its income mix
- 15.3 Ensure they have a robust and clear understanding of the relevant overhead and associated costs to include when applying for resources.
- 15.4 Be clear which organisation is the accountable body in a partnership or consortia working arrangements.
- 15.5 Apply compact principles when sub-contracting to other voluntary and community sector organisations.

16. Agreeing delivery terms

Delivery and payment terms should be proportionate, in order to ensure that the project can run smoothly and focus on maximising the **outcomes** for beneficiaries.

Voluntary and community organisations undertake to:

- 16.1 Be clear about the risks associated with delivering programmes and services, and agree delivery terms before a contract or funding agreement is signed.
- 16.2 Have appropriate governance arrangements in place and ensure that everyone involved understands and agrees delivery terms.
- 16.3 Be clear about payment terms and, if appropriate, demonstrate why payment in advance is required.
- 16.4 Recognise that it is legitimate for funders to ask for public recognition of their funding.
- 16.5 Have appropriate systems in place to manage and account for finances.

17. Monitoring and reporting

Managing funding effectively requires good monitoring. It promotes better working relationships with funders and ensures that performance is managed properly.

Voluntary and community sector undertake to:

- 17.1 Negotiate monitoring and reporting requirements before a financial agreement is made.
- 17.2 Recognise that monitoring, both internally and externally, is an element of good management practice.
- 17.3 Ensure that systems are in place to deliver the reporting required.
- 17.4 Give early notice to funder of significant changes in management or financial or other risks
- 17.5 Be open and transparent in reporting

18. When a financial relationship ends

Contingency planning for the end of a contract or grant helps minimize the impact of beneficiaries. Planning in this way can help with long term sustainability.

Voluntary and Community Sector organizations undertake to:

- 18.1 Plan for the end of funding to reduce any potential impact on beneficiaries and the organisation.
- 18.2 Contribute positively to reviews of programmes or services to inform future practice.

ADVANCING EQUALITY

Working together for equality

Equality for everyone, regardless of their background, is a core value of our society, shared by the public and voluntary and community sectors. Over the last four decades, discrimination legislation and related policy have played an important role in helping to make Britain a more equal society. As both society itself and equality legislation continue to evolve, it is crucial that the public and voluntary and community sectors work well together to achieve equality and fairness for everyone.

This section of the Compact recognises the vital role that the voluntary and community sector plays in helping to create a more equal society and sets out commitments that will help both sectors achieve their equality goals.

The law protects people from discrimination on a number of different characteristics, including race, gender, age, sexual orientation, religion or belief, disability and gender reassignment. These are referred to in this document as 'protected characteristics'. The histories and issues facing people who share these characteristics are complex and often unique. This diversity should be understood and respected.

The role of the voluntary and community sector in promoting equality

In order to work towards its equality objectives, statutory sector needs the insight and knowledge of the voluntary and community sector organisations working at the front line with people who have protected characteristics. These groups have unique experiences and different issues around access to services and involvement in civil society, which should be taken into account in policy making.

Whether or not voluntary and community sector organisations focus their activities on people with a protected characteristic, they can provide a vital role in delivering programmes and services. They also promote community cohesion by giving people the tailored support they need to play a full part in the community.

A good working relationship between the voluntary and community sector and the public sector will help to meet the needs of the people they serve or represent and reduce inequality. The Compact plays a key role in helping this relationship to work, not just through the commitments within this section, but by ensuring that organisations which promote equality are allocated sufficient resources and benefit from effective and relevant policy development, as set out in the other sections of the Compact.

Commitments for the Statutory Sector

19. Promoting equality and diversity

Promoting equality and diversity is a shared goal of the public and voluntary and community sector.

Statutory sector undertakes to:

- 19.1 Work with the voluntary and community sector towards eliminating unlawful discrimination and promoting equality of opportunity. Put strategies in place to help achieve these aims in line with existing public duties.
- 19.2 Where appropriate, work with organisations in the voluntary and community sector that represent people with protected characteristics, to understand their specific needs and design appropriate services.
- 19.3 Ensure that all voluntary and community organisations including those that serve people with protected characteristics have equal opportunities to access statutory funding programmes. This includes access to funds to build capacity, and to prepare and deliver projects.
- 19.4 Be clear about any actions on equality that voluntary and community organisations will be expected to undertake if they are funded to deliver programmes.
- 19.5 If a strategic grant is withdrawn from an organisation serving people with a specified protected characteristic, assess the need to reallocate the grant to another organisation serving the same group.
- 19.6 Work with the voluntary and community sector to identify and remove and barriers that prevents volunteering by people with protected characteristics.
- 19.7 Continue to ensure that it is free for volunteers to access Criminal Record Bureau (CRB) checks and commit to free registration of volunteers with the Independent Safeguarding Authority (ISA). Work towards a single check for volunteers who are volunteering for more than one cause.

20. Representation and Infrastructure

Both central and local government already support voluntary and community sector organisations that give a voice to diverse groups. The public sector can take some simple steps to improve the effectiveness of engaging these organisations

Statutory sector undertakes to:

- 20.1 acknowledge that funding for organisations that serve people with only one protected characteristic can promote cohesion
- 20.2 Enable infrastructure organisations representing people with protected characteristics to participate in policy development, consultation or other activities, by supporting them appropriately.
- 20.3 Recognise that groups which involve people with protected characteristics at community level may be small or informal, and engage with these groups in a way that suits their working methods.

Commitments for the voluntary and community sector**21. Promoting equality and diversity**

An important way in which the voluntary and community sector can promote equality effectively is by working with the statutory sector on equality issues.

Voluntary and community sector organisations undertake to:

- 21.1 Take practical action in partnerships with statutory sector to eliminate discrimination, advance equality of opportunity and build community links.
- 21.2 Show committed leadership to promote equality and, where necessary, put strategies in place to achieve it.

22. Representation and infrastructure

Voluntary and community sector organisations are ideally placed to represent the views of people with protected characteristics. However, it is important that these organisations carry out this role effectively and transparently, and that their activities serve all relevant groups.

Voluntary and community sector organisation undertake to:

- 22.1 Be clear on who is being represented and how their views have been gathered.
- 22.2 When selecting representatives from organisations and communities, be clear who they represent and with what legitimacy
- 22.3 Where appropriate, support infrastructure organisation that can promote the interests of people with protected characteristics.
- 22.4 Identify groups that are in danger of being marginalised, excluded, or are currently under-represented in voluntary activity, and put in place measures to promote their involvement.

Appendix A

**Partnership Improvement
Action Plan
2010**

**Portsmouth Public Sector
& Voluntary and Community Sector**

Partnership Improvement Group

March 2010

Contents

1. Introduction.....	2
2. Expectations of the Partnership Improvement Programme	3
3. Local benefits of cross-sector partnership working	4
4. Local drivers of cross-sector partnership working	4
5. Obstacles and barriers to effective cross-sector partnership working.....	6
6. Local objectives for Portsmouth Partnership Improvement Plan	6
7. Action plan to meet local partnership improvement objectives	7
8. Implementation of action plan.....	10
9. Partnership Improvement Programme participants.....	11

1. Introduction

1.1 This Partnership Improvement Action Plan has been produced by a group of senior officers and practitioners within the public sector and the voluntary and community sector which participated in the IDeA/IVAR Partnership Improvement Programme (PIP) during 2010. Portsmouth was invited by the IDEA to participate and the group members were put forward by senior personnel from each sector, on the basis of their engagement and involvement in cross-sector partnership working.

1.2 The Action Plan is based upon material presented and discussed by the participants during the four sessions of the programme.

1.3 The PIP is a national programme which aims:

- To build trust and mutual understanding across sectoral divides
- To enable senior staff in the public sector (PS) and the voluntary and community sector (VCS) to take the lead in responding to the challenges of working across sectoral boundaries and in cross-sector partnerships
- To develop local improvement plans for more effective cross-sector partnership working across sectoral divides

1.4 A statement for partnership working in Portsmouth

The Portsmouth Compact outlines the relationship between local statutory and the third sector, allowing them to work together more effectively to strengthen communities and improve people's lives. While there are many differences between public and third sectors, -which must be acknowledged and respected – the sectors have much in common.

In particular, the public sector and the third sector share a common set of principles, which are at the heart of what they are both trying to achieve.

These principles make it clear that the Portsmouth Compact is neither a set of rules nor a bureaucratic burden, but a way of working that can help deliver real outcomes and improvements for people and communities. These principles have been created to help the local statutory sector and third sector organisations build relationships and work together effectively in partnership.

The Portsmouth Compact put these shared principles into practice.

Shared principles for working together are:

Respect: Government and the third sector are accountable in different way, but both need to act with transparency and integrity. Effective partnerships are built on mutual understanding and an appreciation of the difference between partners of the Compact.

Honesty: It is only through open communication that strong partnerships can be built and maintained. Full and frank discussions should be the basis for resolving difficulties.

Diversity: The Government and the third sector value a thriving civil society, which brings innovation and choice through a multitude of voices.

Equality: Fairness for everyone, regardless of their background, is a fundamental goal, and government and the third sector will work together to achieve this.

Citizen empowerment: By working together, the Government and the third sector can deliver change that is built around communities and people, meeting their needs and reflecting choices.

Volunteering: The energy and commitment of people giving their time for the public good contributes to a vibrant society, and should be recognised and appreciated.

2. Expectations of the Partnership Improvement Programme

2.1 Participants worked in mixed pairs to identify their various expectations for the programme in Portsmouth. These were summarised as:

- Partnership working is good in the city but it can be better, with practical changes
- Every session engaging and positive, not just a talking shop
- Something practicable and achievable to be achieved
- Need to have a really good plan at the end of this
- Understanding that different sectors can survive if they work in partnership
- Make partnerships more real
- Will be able to identify benefit to others in working in partnership
- Strategic and visionary – not boring
- Show ways in which big funders can better use local resources to drive partnerships
- Move agenda forward
- Build understanding and trust
- Add value to the work of the NHS

3. Local benefits of cross-sector partnership working

Participants then worked in mixed pairs to identify both positive and negative aspects of cross-sector partnership working, based on their actual experience in Portsmouth. These can be summarised as follows:

3.1 Positive aspects of cross-sector partnership working

- Different points of view leading to a better result for everyone
- Commitment to keep working at partnerships despite setbacks
- Current LSP partnership board structure does work - Shared vision across a democratic city
- Pockets of good practice
- Drive for improvement
- Passion for the city
- Can often achieve more by working together
- Good reputation for partnership working

3.2 Difficult aspects of cross-sector partnership working

- Not sufficiently inclusive
- Lack of outcomes or purpose
- Lack of consistent communication across Portsmouth City Council
- Third sector have to comply with the agenda of statutory agencies
- Nature of relationship determined by power/budget/funding
- Not all partnerships are equal – issues of tokenism
- Different partners may have different agendas
- Professional jealousy
- Difficulty in engagement due to shifts in national priorities, restructuring and short term financial planning.

4. Local drivers of cross-sector partnership working

Following a brief account of the context and concepts of partnership working, the group then went on to work in same sector groups to identify the local drivers of cross-sector partnership working in Portsmouth:

Public Sector drivers	Voluntary and Community Sector drivers
Greater accountability with reduced costs	Inclusion: VCS voices can be heard
Efficiency – reduce cost, sustain communities	Use of power and knowledge
Improve outcomes for groups and individuals across the city	Greater understanding of impact of public funding reduction
Reducing inequalities	Larger third sector organisations need to support smaller organisations to be more effective
Improving access	Contribute to more sensible commissioning decisions
Local, responsive marketplace	
Enhanced ‘deserved’ reputation	
Improved customer experience	
Understanding and influencing demand	

In a discussion regarding the distinctive features of the sectors, the following issues were identified:

Third Sector

- Within the third sector a tension is evident between becoming a “public servant” and losing independence through public service delivery or not getting involved.
- Larger charities are moving towards the public sector and there are implications in this for partnership working, as the role of the third sector is predicated on offering something different. Just winning contracts might not necessarily be linked with the distinctive features of the third sector.
- The question was posed as to whether the biggest is always the best when delivering services? Is that the desired outcome from contracting and commissioning processes? Is there some way of working with small to medium sized organisations, which on the one hand might cost more but on the other offer something unique? It was noted that small organisations are most at risk and are in danger of becoming marginalised.

Public sector

- There are distinctions within the public sector. Some parts are more driven by central government directives and policies, such as the police and the PCT, whilst other public sector structures have geographic boundaries and customer focus built into them. People are more likely to work in partnership if they are on the frontline and focused on local people – there is a disconnection in some public sector agencies but it was recognised there are exceptions.

- One challenge that emanated from this discussion was the need for a joined up approach at the top level in the public sector. Health and local authority decisions are interrelated and priorities need to be better aligned and integrated across the local authority system. This would make it easier for the VCS to engage in any strategic review process, for example, around potential public expenditure cuts.
- The representatives from the public sector believed that a public service ethos still exists. It still drives what the public sector does (for example, in social work) and it is continuing to renew itself through a desire to serve the public.
- Blurring of public, third sector and private distinctions, is becoming more evident, particularly through social enterprise models. This is an opportunity as much as it is a threat. Importance is around clarity of purpose and quality of services.

5. Obstacles and barriers to effective cross-sector partnership working

5.1 In mixed groups, participants produced two lists of obstacles and barriers to effective cross-sector partnership working. These were then clustered by the whole group and included:

- *Timescales* – transformation, decision-making and consultation can be slow
- *People and power* – gatekeeping, loudest voices often win, tick-box exercises, vested interests
- *Governance* – lack of quality assurance, accountability, flexibility, authority from ‘above’,
- *Structure* - lack of common objectives, outcomes, priorities; sectors not joined up with each other or within
- *Communications* – poor information and data sharing; too few common communication channels
- *Capacity* – lack of funding; small VCS organisations lack time and resources

6. Local objectives for the Portsmouth Partnership Improvement Action Plan

An initial set of local objectives for partnership improvement was amended to two main objectives:

1. *To identify future joint priorities for the public and third sectors through which partnership working will bring better outcomes for the City.*
2. *To develop the culture, behaviours and structures which lead to positive partnership working.*

7. Action Plan

The following table shows the objectives and a series of actions, with those responsible for coordinating their implementation and the timescales involved:

Action Plan

Objectives	Actions	Lead person/group	Timescale
<p>1. <i>To identify future joint priorities for the public and third sectors through which partnership working will bring better outcomes for the city</i></p>	<p>1. Local authority, PCT and third sector to develop a written strategy for sustaining and supporting a thriving third sector, building on a refreshed and revised local Compact.</p>	<p>Mandy Lindley/Compact Working Group/Third Sector Development Consortium</p>	<p>Draft by end May 2010</p>
	<p>2. Local authority and PCT to identify joint commissioning priorities - leading to more integrated commissioning which will help establish a role for community users, following Supported People models.</p>	<p>PCC Efficiencies Board/David Williams/Tracy Sanders/ JSNA team,</p>	<p>June 2010</p>
	<p>3. Communicate to the third sector existing commissioning priorities, derived from central government for statutory agencies and their departments. Jointly review existing commissioning priorities and other key strategies to agree priorities for partnership working, ensuring communities and users are involved.</p>	<p>Paul Edmondson-Jones/Third Sector 'leadership group'</p>	
	<p>4. Promote the Joint Strategic Needs Assessment more widely to the third sector, making it relevant and sharing it at events/networks. Third sector to be involved in production of JSNA and deciding how it can be used.</p>		
	<p>5. Map Portsmouth's third sector organisations, who is doing what and terms of reference. Develop an online directory as a basis for communication across and within the sector, identifying gaps, synergies and potential partnership or cooperation and added value linked to commissioning priorities. Track 'the State of the Sector' through changing economic and social circumstances in the city; provide an online tool for Portsmouth residents seeking information, advice and support.</p>	<p>Community First (build on Merlin project)/Third Sector 'leadership group'/Matt Gummerson</p>	<p>End June 2010</p>
	<p>6. Explore, support and indicate opportunities for third sector partnerships and consortium building, to bid for tenders and funding.</p>	<p>Mandy Lindley/Community First/Providers Network/public sector funders</p>	<p>April 2010</p>

Objectives	Actions	Lead person/group	Timescale
<p><i>2. To develop the culture, behaviours and structures which lead to positive partnership working</i></p>	<p>1. Develop more comprehensive communication media – a partnership website – and a communication strategy. Identify internal/external targets; what needs to be communicated; how best to communicate, avoiding dilution of messages.</p>	<p>Third Sector 'leadership group'/ PCC communications team</p>	<p>Scope by end September 2010</p>
	<p>2. Bring more organisations together to realise their joint potential and responsibilities: hold a local event, with possible follow-up events, that has a diverse cross-sector group; challenges entrenched cultures to create a 'can-do' culture based upon 'creative problem solving'. Outcomes to include: statement of partnership values that are based on behaviours that will drive success; greater understanding and better ways of working together.</p>	<p>Mandy Lindley/Nicola Youern to develop</p>	<p>End April 2010</p>
	<p>3. Enable third sector infrastructure organisations to collaborate or merge in order to strengthen the leadership and structure of the sector. Clarify the roles and links between existing infrastructure organisations.</p>	<p>Third Sector 'leadership group' (comprising the main third sector infrastructure organisations)</p>	<p>Two meetings by end June 2010</p>

8. Implementation of the action plan

The Third Sector 'leadership group' and Community First will act as the lead to ensure the implementation of the PIP Action Plan.

The Third Sector 'leadership group' will work to build a strategic leadership able to communicate the overall partnership working vision, support achievements, manage failures and hold the public agencies to account. It would seek to foster a culture where all sectors are 'leaders', based upon networking principles and not hierarchies of control.

The 6-month review to be carried out by IVAR in September 2010 will include examination of whether the Action Plan addressed the identified obstacles and challenges and the extent of any new barriers to partnership working.

Participants in the PIP

Public sector

CLlr David Stephen Butler, PCC
Rob Dalton, Director of Corporate Affairs PCT
Sylvia Dennis Partnerships Manager JCP
Paul Edmondson-Jones, LSP Chair
Margaret Geary, Strategic Director PCC
Matt Gummerson Principal Strategy Advisor PCC
CLlr Donna Jones, PCC
Mandy Lindley, Third Sector Partnerships and Commissioning Manager PCC
Pete Roberts, Voluntary and Community Support Officer PCC
Suzannah Rosenberg, Head of Integrated Commissioning Unit PCC
Tracy Sanders, Chief Executive PCT
James Sandy, Community Engagement Manager PCC
Rob Watt, Head of Adult Social Care PCC
David Williams, Chief Executive PCC

Voluntary and community sector

Kaye Checkley, Chief Executive Age Concern
Albert Choi, Chinese Community
Tunde Bright Davis, Chief Executive Portsmouth Race Equality Network Organisation
Carole Damper, Chief Executive Roberts Centre
Kam Ip, Chinese Community
Tom Morton, Chair Community Network
John Palmer, Chair Portsmouth Third Sector Development Consortium
Ian Piper, Chief Executive Community First for Portsmouth
Geoff Philpotts, Community Regeneration Manager 1st Wessex Housing
Nicola Youern, Chief Executive You Trust

Institute for Voluntary Action Research

Sam Brier, Research Associate
Gordon McCullough, Deputy Director

GLOSSARY OF TERMS

Access: The extent to which users are able to participate in or receive the services they want. Accessibility issues include physical access to buildings, opening hours, childcare, availability of interpreters, signers and large print, for example.

Accountable: Expected to report and justify actions or decisions to another party/person. Answerable to.

Accountability: Duty to report and justify actions to others.

Advocate: to put forward a cause; to enable others to present their own views.

Beneficiaries: People who benefit from something or use a service.

Black and Minority Ethnic Groups: A group run predominately by people from Black and Minority Ethnic communities for the benefit of the same community.

Capacity Building: Activities that ensure individuals, groups and communities have access to the knowledge, skills and resources they need to take action or work efficiently and effectively. This includes: information, training, consultancy, advice and networking.

Community: Any group or organisation of people working together who identify with a common concern, interest, issue or place.

Community Cohesion: Promoting greater knowledge, respect and contact between various cultures, and establishing a greater sense of citizenship.

Community Development: Building communities at a local level by linking individuals and organizations working toward common ends. It involves forging and strengthening social ties between people, and developing the Voluntary and Community Sector.

Community Group: An informal group or a more formal organisation of people. Community groups are formed to pursue a common interest, meet a shared need or campaign for a common cause. Most are run entirely by volunteers, and will be run by their members and a committee elected from members.

Community Ownership: Where the community takes responsibility for issues that affect them as a collective group.

Community Strategy: The community strategy for Portsmouth sets out a vision for the future of Portsmouth to 20???. It is monitored by the Portsmouth Local Strategic Partnership and was launched in April 2018

Community Sector: A general term to describe small community groups who are typically managed by volunteers, do not employ staff, and do not have regular income or funding. May also be included within the umbrella term voluntary sector.

Compact: A mutual agreement that provides a framework to guide partnership working between the statutory and Voluntary and Community Sectors.

Consultation: The aim of consultation is to inform the planning and development of more effective policies and services by listening to, and acting on, the views and needs of users and stakeholders.

Core Costs: The main costs incurred in running an organisation or services, including management, premises, administration, training, research and Information Technology.

Diversity: In this context refers to the range of views, beliefs, values and priorities that exist within the wider community.

Evaluation: Evaluation is the systematic collection of information to judge the effectiveness of activities and outcomes of an organisation, a service or a piece of work. This information is used to reflect on the how far it is achieving its aim and to inform decisions about future work, i.e. reviewing the work.

Full Cost Recovery: Full cost recovery provides a more sophisticated approach to funding the Voluntary and Community Sector than the many other approaches that have been used to date. Under full cost recovery, activities are costed to account for all expenditure associated with delivery. In this way, any additional costs associated with delivering specific service or reaching dispersed users would be incorporated into funding bids as a matter of course, offering a transparent and realistic picture of the true cost of carrying out a project.

Funder: An organisation or individual providing cash or in-kind support.

Governance: This describes the way an organisation is managed, including its power, responsibilities and decision-making processes. This is often set out in the organisation's constitution or legal identity.

Grassroots: Groups or activities run by the people who benefit from them.

In-Kind Support: Non-financial support or donations.

Local Strategic Partnership (LSP): The LSP in Portsmouth brings together a range of key local stakeholders from the public, private, voluntary and community sectors to develop a joint strategy and priorities.

Local Area Agreement: This is an agreement that focuses on a range of agreed outcomes that are shared by all the delivery partners locally and which they all agree to work towards achieving. They will simplify the number of additional funding streams from central government going into an area, help to

join up public services more effectively and allow greater flexibility for local solutions for particular local circumstances.

Milestones: Key events with dates, marking stages in the progress of a project or programme.

Monitoring: Regular collection and analysis of inputs, outputs and outcome data, along with information concerning the service being delivered.

Not-For-Profit: To make sure that any surplus unrestricted income is reinvested in the organisation/group as a whole and not distributed to individual shareholders.

Outputs and Outcomes: Outputs measure what was directly produced by a project or programme, such as additional training places or meals on wheels. Outcomes measure the longer-term changes to an area or the quality of people's lives that were brought about by the project or programme.

Participation: Participation is a process whereby individuals or groups are enabled to play an active role in decision-making processes or activities that are led by another agency.

Partnership: As in an alliance or joint work. A number of groups, organisations and individuals who agree to work towards common aims objectives and outcomes. Members of a partnership share resources and responsibilities and agree to work together in a co-operative and mutually supportive way to achieve partnership aims.

Private Sector: Businesses likely to raise profits from the sale of goods and services.

Public Sector: Also called the Statutory Sector, consisting of bodies regulated and funded through public revenues i.e. hospitals, council, police etc.

Public Services: Public services are those services provided by the government, either directly (through the public sector) or by financing private provision of services, for the benefit of the community, such as fire and police protection, education, waste disposal, health services, street cleaning, etc.

Regeneration: the re-use or redevelopment of decaying or run-down parts of older urban areas to bring them new life and economic vitality.

Representatives: People who are appointed or elected, to put forward the views of others.

Resources: A general term, which can include funding, staff, volunteers, premises, information, assets and equipment.

Service Provider: An organisation that provides a direct service to the public or support and advisory services to other organisations and groups.

Small Group: An organisation with no more than two paid staff, and frequently less. Often run entirely by volunteers.

Social Capital: The social capital of a society includes the institutions, relationships, attitudes and values that govern interactions among people. It contributes to economic and social development. It includes the shared values and rules for social conduct expressed in personal relationships, trust and a common sense of "civic" responsibility, that makes a society more than a collection of individuals.

Social Enterprises: These are organisations with objectives that benefit the community. They reinvest any surplus to achieve these objectives, or invest it in community rather than distribute it as profit to shareholders and owners.

Social Exclusion: A term used to describe the negative impact on people's lives of discrimination, poverty, deprivation and a combination of linked problems such as unemployment, poor skills, low incomes, poor housing, high crime, bad health and family breakdown. It can also have a wider meaning, which encompasses the exclusion of people from the normal exchanges, practices and rights of society.

Socially Excluded: People who are affected by social exclusion.

Social Inclusion: The action that agencies such as councils, Voluntary and Community Sector organisations etc take in order to overcome and combat social exclusion.

Stakeholders: Any group or individual who can affect or are affected by the achievement of an organisation's objectives.

Statutory Sector: Organisations that have been created through acts of parliament. The law sets out what they do.

Undertaking/Joint Undertaking: A promise made by one or more partners to other partners.

Users: Are the people who benefit from or use a service. They are also called beneficiaries, customers, clients, consumers, and recipients.

Voluntary Organisation: This is a formal non-profit-distributing and non-statutory organisation, usually set up as a charity, which aims to provide a service or meet a need that will benefit the public. Voluntary organisations often have paid employees.

Voluntary and Community Sector (VCS): A general term to describe not-for-profit neighbourhood based groups, communities of interest, faith groups, self help groups, campaigning organisations, voluntary organisations that employ staff, local charities and local branches of national charities.

Volunteer: Refers to a person who gives a portion of their time to an organisation as a worker or helper voluntarily and without payment

Appendix C

BACKGROUND DOCUMENTS

National

- (i) The Role of the Voluntary and Community Sector in Service Delivery: *A Cross Cutting Review* (HM Treasury, September 2002)
- (ii) Exploring the Voluntary and Community Sector in Public Service Delivery and Reform: *A Discussion Document* (HM Treasury, 2003)
- (iii) Voluntary and Community Sector Review 2004: *Working Together, Better Together* (HM Treasury, November 2004)
- (iv) Think Smart.....Think Voluntary Sector (Office of Government Commerce/Home Office, June 2004)
- (v) Small Business Friendly Concordat: *Good Practice Guidance* (Office of the Deputy Prime Minister/Local Government Association/Department of Trade and Industry, March 2004)
- (vi) National Strategy for Local Government Procurement (Office of the Deputy Prime Minister/Local Government Association, 2003)
- (vii) ChangeUp: Capacity Building and Infrastructure Framework for the Voluntary and Community Sector (Home Office, 2004)
- (viii) Understanding *Futurebuilders* England (NCVO, November 2004)
- (ix) Firm Foundations: *The Government's Framework for Community Capacity Building* (Home Office, 2004)
- (x) Choosing Health: *Making healthy choices easier* (Department of Health, 2004)
- (xi) Guidance to Funders: *Improving funding relationships for voluntary and community organisations* (HM Treasury 2006)

Local

- (i) The Community Strategy
- (ii) Portsmouth Compact Our Agreement to work Together

Council

- (i) Portsmouth Procurement Strategy