



Organisations and individuals working together to  
reduce isolation and loneliness amongst older  
people across Bristol

# **Delivery Partner Contract**

## ***Integrated Community Clinic Project***

In two parts:

**Partnership Agreement**

**Service Level Agreement**

Between

Age UK Bristol (Lead Partner)

and

***Delivery Partner*** (Provider)

**BRISTOL – A BRILLIANT PLACE TO GROW OLD**

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## **Part 1: Partnership Agreement**

# BRISTOL – A BRILLIANT PLACE TO GROW OLD

## 1. Background & General Information

### 1.1. About BAB

Bristol Ageing Better (BAB) is a wide Partnership of older people and organisations across Bristol who are working together to develop services and support for older people that address isolation and loneliness.

BAB has developed a strategic Programme for this purpose which was submitted to the Big Lottery Fund's Fulfilling Lives; Ageing Better Programme in April 2014. In September 2014 the Big Lottery Fund awarded BAB £5.9million for the initial 5 year Programme which began in April 2015.

BAB is committed to putting older people "in the driving seat" by significantly involving them in every aspect of the Programme including governance, development, management and delivery. The initial Programme includes:

**1**  
**Creating the Conditions**

- Age Friendly City
- Public Understanding
- Asset Based Training
- Preparing for Later Life



**3**  
**Working with Communities**

- Community Development for Older People
- Schools for All Ages
- Community Kick-start Fund
- Community Researchers

Bristol Ageing Better (BAB) is a partnership of local organisations working to reduce social isolation and loneliness among older people and help them live fulfilling lives.

**2**  
**Identifying and Informing**

- GP Case Finding
- Social Prescribing
- Community Navigators
- Community Case Finding
- First Contact Checklist

**4**  
**Supporting Individuals**

- Wellbeing Service
- Group work and Peer Support
- Combining Personalisation with Community Empowerment (CPCE)

## **1.2. BAB Values and Commitments**

These include:

- Older people will play a lead role throughout the process.
- Organisations will work together in/through the Partnership to build services that can be sustained after Big Lottery funding ends.
- Providers will be sought who can build community assets and work closely with local organisations and older people.
- The Partnership will be fair, transparent and high quality.
- BAB partners will be highly engaged throughout the Programme.
- Service and activity proposals will demonstrate value for money.
- Service specifications will be refined and developed working closely with all our partners and not just those interested in providing them.
- Our local third sector organisations will be encouraged to provide as much of the BAB plan as possible – and be supported to do so.

## **1.3. Purpose of the Bristol Ageing Better Partnership**

Bristol Ageing Better is a Partnership Programme funded by the Big Lottery Fund which aims to deliver:

- 1.3.1. an increase in the number of older people who report that they have the amount and type of social contact that they want to reduce isolation and loneliness
- 1.3.2. a greater number of older people respondents who say that they can influence decisions that affect their local area and how services are designed and delivered.
- 1.3.3. More older people are able to contribute to their community through such mechanisms as volunteering, belonging to a forum, steering group or other activity.
- 1.3.4. Evaluation and learning from BAB projects/initiatives will help to build an evidence base to ensure that future services in Bristol are better planned and

more effective in reducing loneliness and social isolation.

#### **1.4. Lead Partner (the Grant Holder)**

1.4.1. Age UK Bristol is the Grant Holder of the Ageing Better Grant from the Big Lottery Fund (referred to as 'the Fund') and is the Lead Partner of the Bristol Ageing Better Partnership.

1.4.2. Age UK Bristol is therefore the body responsible for delivering the Ageing Better Programme in accordance with the terms and conditions of the Fund (appended at Schedule 1). This means that Age UK Bristol, as Lead Partner will:

- be solely responsible for ensuring that all the partners comply with the Fund's terms and conditions
- be the only body that liaises with the Fund regarding the Partnership
- notify the Fund of any delays to the Programme
- not make grants to delivery partners but rather enter into Service Level Agreements for the provision of goods and services

#### **1.5. The Parties**

Parties to this Partnership Agreement (referred to as 'the Partners') are:

<b>Organisation</b>	<b>Address</b>	<b>Telephone</b>	<b>Contact / email</b>
<b>Lead Partner</b>	Canningford House	0117 928 1539	Adam Rees
Age UK Bristol	38 Victoria Street		<a href="mailto:adamrees@ageukbristol.org">adamrees@ageukbristol.org</a>
Ltd.	Bristol BS1 6BY		<a href="http://ageukbristol.org">ageukbristol.org</a>

<b>Delivery Partner</b>	<b>Address</b>	<b>Telephone</b>	<b>Name (project lead)</b>
<b>Name of organisation</b>	<b>Postcode</b>	<b>number</b>	<b>Email (project lead)</b>

#### **1.6. Partnership Working Arrangements and Governance**

Age UK Bristol is the legally accountable body to the Big Lottery Fund. The Age UK Bristol Board signs off all key decisions including applications to Big Lottery Fund. The Age UK Bristol Board delegates decision making around the development and ultimately the delivery of Bristol Ageing Better (BAB) Programme to the BAB Programme Board.

The BAB Programme Board meets bi-monthly and comprises key partners from the voluntary, statutory and private sectors as well as older people. Selection of Board members takes into account the breadth of knowledge, experience and influence required for the leadership of the Programme.

The BAB Partnership includes over 200 self-selected partners who all have a major interest in the health and wellbeing of older people and capacity to contribute to addressing their loneliness and isolation. The Partnership meets prior to BAB Board meetings and its deliberations inform and influence Board decisions. It contains all the significant organisations supporting older people in the city.

The BAB Programme Management Team is lead by the BAB Programme Director who reports to the Age UK Bristol Chief Executive, BAB Programme Board and through the Chief Executive to the Age UK Bristol Board. The Programme Management Team includes the BAB Programme Manager, Communications Officer, Contracts & Finance Officer, Age Friendly Officer, Learning & Evidence Officer, Partnership Support Officer and Programme Administrator. The Programme Director and Programme Manager between them will manage the formal contracts (including legal and financial agreements) with the BAB delivery partners once commissioning of services has occurred and Partnership Agreements/Service Level Agreements (SLAs) are in place for the individual BAB projects.

The BAB Sponsors Group will support the BAB Director and Manager in their work. The Sponsors Group includes the BAB chair and key partners: Age UK Bristol, Bristol Older People's Forum and Bristol City Council

## **1.7. BAB Programme Board Responsibilities**

- 1.7.1. to provide strategic leadership to the Bristol Ageing Better Programme
- 1.7.2. to approve key decisions including agreement of: Vision and Strategy, Programme Plan, commissioning arrangements, staffing structures and recruitment
- 1.7.3. to agree Programme and annual plans and budgets maximising value for money and working within Big Lottery Fund guidelines and agreements
- 1.7.4. to support the key activities of the project as fully as they are able to, including the BAB Programme's 16 interventions, evaluation and sharing of learning through local and Ageing Better networks
- 1.7.5. to act as champions and connectors for the project using their influence to bring appropriate activities and interventions, organisations and structures into the BAB strategic framework
- 1.7.6. to provide management and support to the BAB Programme Director
- 1.7.7. to exchange and share best practice both from and about the project and from and about their own work/expertise in working with older people
- 1.7.8. to receive regular reports on: achievement of outcomes; income and expenditure; individual Programme projects; evaluation and learning and use those to monitor the progress of the Programme

In doing so the Board will:

- 1.7.9. meet as frequently as they and the Lead Partner determine is necessary (but not less regularly than quarterly), dependent on workloads, project milestones and any other relevant factors. Meetings will also be timed to support critical milestones.



- 1.7.10. be quorate if 60% of partners are in attendance. Failure to secure a quorate meeting of the Board Partnership will not preclude the Lead Partner from taking such decisions as are necessary in order to ensure the timely management and functioning of the project.
- 1.7.11. ensure older people are involved in the governance of the project at all levels, including that of the Board and will receive support, empowerment and training to enable this to happen. There will be dedicated activities and support and it will be the responsibility of the Lead Partner and Board to ensure that:
- older people are receiving the support they need in order to be meaningfully involved in project governance
  - meetings, decision-making and other project governance activities are conducted in such a way as to enable and include older people
  - Older people who attend or are involved in meetings (or any other activities that require them to travel to a place outside the home) are able to do so safely and conveniently and at no out-of-pocket expense to themselves.
- 1.7.12. be chaired by the Age UK Bristol Chair or BAB Deputy Chair in his/her absence
- 1.7.13. be supported by Age UK Bristol to service these meetings, ensuring that all relevant documentation – whether advance papers, minutes of meetings or other reports or materials – are produced and sent by email to the designated individual representing each key partner
- 1.7.14. ensure that direct partners disclose any and all conflicts of interest or personal interests in any business or matter to be discussed or proposed at the meetings

## **1.8. Roles & Responsibilities of Delivery Partners**

The purpose of this Partnership Agreement (the “Agreement”) is for Delivery Partners to understand their roles and responsibilities in helping the Lead Partner deliver the Programme in budget, on time and in accordance with the Fund’s terms and conditions of grant.

The detailed schedule of roles and responsibilities, including names and contact addresses and key contacts, timeline, deadlines to be met, implementation plan, expected outputs and deliverables is included in the Service Level Agreement (attached).

In general the Delivery Partners will:

- be responsible for the development and delivery of an agreed work programme for the project
- contribute effectively to project partnership working by sharing expertise and learning and making decisions on behalf of their organisation and network
- report back about the project and the Ageing Better Programme through the relevant management structures in their respective organisations
- disclose any and all conflicts of interest or personal interests in any business or matter relevant to the project or to the Ageing Better Programme
- attend regular Bristol Ageing Better meetings as arranged
- provide support and advice to other partners about their project/activities and roles within the Programme
- accurately record, retain and provide evidence of time spent, resources expended, outputs achieved and outcomes met on the activities directly related to the Programme, using agreed frameworks and reporting forms for the purposes of monitoring and/or audit
- work with the Lead Partner to evaluate the Programme and complete the Fund’s End of Grant requirements
- support the Lead Partner to use the Bristol Ageing Better website to distribute project updates and information about the delivery of the project for other partners, service users and stakeholders
- agree to use their reasonable endeavours to ensure that any information provided to the project (whether directly or via the Lead Partner) is not knowingly misleading or inaccurate.

- The Lead Partner is required of itself and its partner organisations to openly advertise all new grant-funded posts being recruited that are funded through Bristol Ageing Better (pursuant of clause 7.2 of the BIG Lottery Terms & Conditions). In all cases where procurement processes need to be followed, selection decisions will be made by the appointed Delivery Partner.
- An exception to the above applies if it is determined that a specially convened Assessment Panel is required in order to remove any potential conflict of interest. In this case, powers will be delegated to an Assessment Panel comprising two Board Partners (normally including Age UK Bristol) and two independent representatives assembled for this purpose and having no connection with the contract in question.

### **1.9. Service Level Agreement**

This Agreement should be read together with the Fund Terms and Conditions of Grant (Schedule 1) and the Delivery Partner's individual Service Level Agreement (SLA) (Part 2). The SLA details:

- the amount and purpose of any funding
- the specific role of the Delivery Partner and agreed deliverables, outputs, outcomes, performance levels, deadlines and indicators
- any timings and method of payments
- how providers will share learning on impact with Age UK Bristol and the wider Partnership
- who is responsible for setting up meetings, how these will be organised, how often and what records will be kept

### **1.10. Approach to Sustainability**

One of our measures of success for the BAB Programme is the continuation of the Partnership and BAB projects after the initial BIG funding ends in 2020. In order to achieve this, our lasting impact strategy (Sustainability Plan) includes:

- developing and implementing a well conceived and resourced communications plan, a significant amount of which will be focussed on communicating new ways of working to key stakeholders including statutory bodies and potential funders

- Linking the evolution of BAB projects and the overall Programme to the communications strategy
- The 'Creating the Conditions' strand of BAB's strategy will influence others and have long lasting impacts that go far beyond the duration of the five-year Programme:
  - Age Friendly City work will change the extent that public sector agencies address ageing.
  - The animation produced by Aardman will seek to raise aspirations of older people and create lasting change in people's thinking about loneliness.
  - Asset Based Training will change the policy and practice of front line staff working with older people.
- plans for BAB Community Researchers to be developed into a self-sustaining social enterprise providing services to public and private sectors
- Age UK Bristol is committed to leadership of the BAB Programme being incorporated into the core work of the organisation.
- BAB has already started to and will continue to create good links with the other 14 Ageing Better areas to share learning and contribute to other local initiatives.
- The Evaluation and Evidence sub group will have a focus on evaluating and recording evidence about what works. There is an expectation that commissioners can be influenced by this data. In order for this to happen:
  - BAB is well linked into the Older People's Partnership Board and Health & Wellbeing Board.
  - The Programme Board includes representation from Bristol City Council and Bristol Clinical Commissioning Group.
- building in a responsibility of providers to engage in regular sustainability workshops throughout the life of the Programme
- Most of the initiatives are expected to be delivered by volunteers. Whilst there will be a level of ongoing resource required to maintain this, it is expected to be at an affordable level.
- It is expected that the BAB wider Partnership will continue to grow throughout the Programme, with more organisations joining as they become aware of BAB.

- Age UK Bristol will maintain links with stakeholders over a long term project by holding regular meetings and events to share learning and to ensure BAB is incorporated into existing and emerging local strategies

## **2. Terms & Conditions of the Partnership Agreement**

### **2.1. Partnership Agreement Conditions**

- 2.1.1. The duration of this Agreement will be from the date of its signatures by both parties until 31<sup>st</sup> March 2020 unless terminated earlier under the terms of this Agreement.
- 2.1.2. In the event of conflict between the interpretation of the terms and conditions of grant and those of the Agreement, the Fund's terms and conditions (appended at Schedule 1) will take precedence.
- 2.1.3. The Agreement will be terminated if for any reason the Big Lottery Fund ('the Fund') needs to suspend or terminate the grant.

### **2.2. Financial, Managerial and Monitoring Conditions**

- 2.2.1. The Partner will be responsible for the delivery of the Partner's own activities, deliverables and associated outputs and outcomes and will be responsible for collecting and collating performance monitoring information relating to deliverables, outputs and outcomes in accordance with the Service Level Agreement (which will outline how the Delivery Partner shares learning on impact with Age UK Bristol and the wider Partnership).
- 2.2.2. The Partner should submit agreed performance monitoring information on a quarterly basis to Age UK Bristol's named Contract Manager, using the agreed monitoring framework which sets out provider responsibility to work with the Programme-level evaluator.
- 2.2.3. The Delivery Partner will enter into a separate Service Level Agreement (as

attached at Part 2).

- 2.2.4. Age UK Bristol will manage and administer a payment system in respect of Partner claims or invoices relating to any previously agreed expenditure for the Bristol Ageing Bristol Programme Delivery Partner's Service Level Agreement (attached at Part 2).
- 2.2.5. Age UK Bristol undertakes to make payment within 30 days of receipt of satisfactory invoices or claims once Age UK Bristol has received grant funding from the Fund.
- 2.2.6. Age UK Bristol is not liable to make any payments to the Partner until Age UK Bristol has received grant funding from the Fund.
- 2.2.7. The Partner must keep records relating to the Agreement for a period of seven years from the end of the Agreement. This includes financial records (personnel and payroll records). The Partner must allow the Fund and the National Audit Office access to these records if required. The Lead Partner will provide BIG with information and documents as required and comply with any reasonable requirements of BIG in relation to visits and meetings within working hours.
- 2.2.8. At the end of each calendar year, as part of the budget setting process for the following financial year, Partners shall have the opportunity to review the level of involvement that they will have in the project including any services they intend to offer and the amount of accommodation they require to utilise. Any planned change shall be deemed to be confirmation of the Partner Roles for that period.
- 2.2.9. In the event that the Partner wishes to withdraw from or make any reduction to their involvement in the Partnership, then it shall give not less than 6 months notice to the Lead Partner (or less notice with agreement of Age UK Bristol) at the address provided at A5. Age UK Bristol and the Partner will meet as soon as practical after the Partner's intention is declared to agree

the best way forward, minimising impact on the service and service users and allowing time for replacing the elements of delivery as required. Agreements reached will be recorded and signed off by both parties as a variation of the Agreement. The Big Lottery Fund will be informed of any changes and possible impact. In the event the Partner indicates its intention to withdraw, the Lead Partner shall then consider whether it is necessary to recruit a replacement partner. If this proves to be the case then an Expression of Interest process the same as that originally used to select and subsequently extend the Partnership will be instigated.

- 2.2.10. Changes shall not be made to this Agreement without prior consultation with and the agreement of the Partners. The Partners agree that any such changes must comply with the BIG Lottery Terms & Conditions and in the event that they do not, the BIG Lottery Terms & Conditions shall take precedence and apply.

### **2.3. General Conditions**

- 2.3.1. In delivering the Programme activities and projects or services, the Partner must agree to adhere rigorously to all relevant and applicable internal policies, procedures and codes of practice. Policies in place should include: Equal Opportunities Policy, Health and Safety Policy, Data Protection/Freedom of Information Policy, Vulnerable Adult Protection Policy or Older Persons Safeguarding Policy, Volunteering Policy and Conflict of Interest.
- 2.3.2. The Partner must hold all appropriate insurance cover.
- 2.3.3. The Partner must meet all health and safety regulations and requirements for employees, volunteers and members of the public, and be able to demonstrate that the Delivery Partner can do so.
- 2.3.4. The Partner must comply with the requirements of the Data Protection Act 1998 and the Freedom of Information Act 2000. The Delivery Partner must take due consideration to protect any sensitive information and to maintain

user confidentiality. Where the Partner is providing personal services, advice or counselling and if the Delivery Partner holds any personal information, the Partner must have and implement a written policy of confidentiality.

- 2.3.5. The Partner must take all reasonable steps in the provision of the services, involvement in the Partnership and in any other of the Partner activities to ensure that there is equality of access, use and involvement for everyone and that the Partner does not discriminate directly or indirectly on grounds of any protected characteristic as defined in the Equality Act 2010. This does not mean that the Partner's services cannot be targeted at particular equalities groups, where there is evidence of need and a targeted service is the best way of meeting those needs.
- 2.3.6. The Partner must comply with the requirements of its safeguarding vulnerable adults and children policy by ensuring that all people who use the Partner's services/activities and those who come into contact with staff providing support and care (including any children) are, as far as possible, enabled to experience lives which are free and safeguarded from abuse or exploitation.
- 2.3.7. The Partner will undertake to permit the copying and use, for the general benefit of the Bristol Ageing Better Partnership, delivery partners and service users, of agreed reports and materials generated by the Project with the aim of evidencing their work, providing:
- they are not sold to a third party
  - they are not used to the detriment of the Lead Partner or other Partners' copyright and the fact that they were funded by the Big Lottery Fund is acknowledged
- 2.3.8. The Bristol Ageing Better Partnership intends to share and build on the successful learning, capacity building, networking and working models that its partners develop together through the funding support so that these can be sustained beyond the period of funding for the benefit of service users. The Partner will work in the spirit of this intended approach to sustainability.



- 2.3.9. The Partner will direct any strategic media enquiries pertaining to Bristol Ageing Better to the Bristol Ageing Better Programme Manager. The Partner may deal with local media enquiries about their project but must inform us of any such enquiry.
- 2.3.10. The terms and conditions of this Partnership Agreement may not be altered except with the agreement in writing of all parties and subject to the consent of the Fund.
- 2.3.11. This is a Partnership Agreement with the aim of collaboration in the delivery of the Bristol Ageing Better Programme and does not constitute a legal partnership as defined in the Partnership Act 1890.

### **3. Communication**

- 3.1. Both Age UK Bristol and the Partner will appoint a representative or contact person.
- 3.2. The Age UK Bristol representative will be the first point of contact and provide advice or information as appropriate and carry out monitoring visits.
- 3.3. The Partner's representative will undertake to keep Age UK Bristol informed of any changes within the organisation affecting the Partner's service delivery, management functions or financial viability, including any legal claims against the Partner.
- 3.4. Any communication about this Agreement will be in writing and sent to the postal or email address of the contacts named in the Service Level Agreement (unless an alternative address has been notified to the other by either party). Delivery of any such communication will be taken as the business day on which it is received.
- 3.5. If there is a dispute between the Partner and other Bristol Ageing Better

Partners or the Lead Partner then the Lead Partner will in the first instance arrange a meeting or meetings to reach a resolution of the dispute in question.

**3.6.** If the meeting(s) referred to in 3.5 does not resolve the matter in question then the parties will attempt to settle it by mediation in accordance with the Centre for Effective Dispute Resolution Model Mediation Procedure or any other model mediation procedure as agreed by the parties.

**3.7.** Age UK Bristol retains the right to act unilaterally to resolve any conflict in the best interest of The Programme.

**3.8.** All materials that are produced from Bristol Ageing Better will make reference to Delivery Partners in relation to their delivery of projects and their involvement in any activities that contribute to the Programme within the Programme.

#### **4. Signed Declaration (Delivery Partner)**

<b>On behalf of the organisation named below I agree to the terms of Sections 1-3 of this Agreement</b>	
<b>Partner Organisation Name</b>	<b><i>Name of organisation</i></b>
Signatory name	<b><i>Signatory name</i></b>
Role in Project Delivery	<b><i>e.g. Project Lead</i></b>
Position in organisation	<b><i>e.g. Chief Executive</i></b>
Signed	
Date	

<b>On behalf of Lead Partner</b>	<b>Age UK Bristol</b>
Signatory name	<b>Mark Baker</b>
Position in organisation	<b>Chief Executive</b>
Signed	
Date	

## **Schedule 1**

### **Terms and conditions of the Fund (BIG)**



**Organisations and individuals working together to  
reduce isolation and loneliness amongst older  
people across Bristol**

## **Part 2: Service Level Agreement**

**BRISTOL – A BRILLIANT PLACE TO GROW  
OLD**

# 1. Scope

## 1.1. Scope of the Service Level Agreement

1.1.1. This is a Service Level Agreement (referred to as the "Agreement") between :

**Age UK Bristol Ltd.** (Referred to as the "Lead Partner")

**Canningford House, 38 Victoria Street, Bristol BS1 6BY**

and

**Name of organisation** (Referred to as the "Delivery Partner")

**Address and postcode**

1.1.2. Age UK Bristol is the Grant Holder of the Ageing Better Grant from the Big Lottery Fund (referred to as 'the Fund') and is the Lead Partner of the Bristol Ageing Better Partnership.

1.1.3. The Delivery Partnership Agreement (the "Agreement") is between the Lead Partner and Delivery Partner.

1.1.4. The Delivery Partner has agreed to provide the Service Activities described in this Agreement that contribute to the Bristol Ageing Better Programme (referred to as the Programme). It is a condition of the Agreement that payments from the Lead Partner must be spent wholly and exclusively on the provision of the Service Activities.

1.1.5. Funding is for £**total contract value** for the period **dates of total contract duration e.g. 1<sup>st</sup> April 2017 – 31<sup>st</sup> March 2020** subject to satisfactory quarterly reports as described in the monitoring schedule at paragraph 4 and in accordance with the terms and conditions of the Partnership Agreement.

1.1.6. The funding for the period **date period covered by this SLA e.g. 1<sup>st</sup> April 2017 – 31<sup>st</sup> March 2018** of £**total amount of funding to be paid in period covered by this SLA** will be paid to the Delivery Partner in accordance with the budget set out at paragraph 3.3. Payments shall be made quarterly in advance subject to satisfactory quarterly reports. All payments are subject to the Delivery Partner's continuing satisfactory performance and in particular the delivery of the service

defined as the Work Programme at paragraph 3

## **1.2. The Aims of the Integrated Community Clinic project**

BAB is working with The South Bristol Primary Care Collaboration (SBPCC) to deliver the Integrated Community Clinic project. The SBPCC consists of Bristol Community Health and 6 local GP practices including: The Lennard Surgery, Grange Rd Surgery, Hillview Family Practice, Hartwood Healthcare, The Crest Family Practice and The Merrywood Practice. This group has formed with the aim of developing new ways of working together, providing services tailored to promoting independence and improving social value locally. The development of an integrated community clinic or leg club is one of a number of projects that the group are developing.

The aims of the integrated community clinic are:

To promote faster and longer lasting healing through enabling a social interaction that supports and encourages people to feel more in control of their condition.

Encourage on-going social interests in the community that people can attend that will play a part in maintaining health.

Provide consistent gold standard treatment by clinical staff working in a new and integrated way.

## **1.3. Service Values**

The overall vision of BAB is to improve the quality of life of older people. All projects should be designed and delivered to reflect a coherent set of values to include:

- **Positive Attitude:** the service will promote a positive attitude towards older people. It will actively challenge ageism and actively promote positive images of older people.
- **An Asset Based approach:** the service will adopt an asset based approach which seeks wherever possible to focus on the strengths and experience of individuals and communities and enables older people to make a positive contribution.
- **Valuing the voice of older people:** the service will put in place structures to involve older people in decision making about how and what activities are undertaken.
- **Sustainability:** the service will recognise the need to plan and deliver activities in such a way that they are sustainable over the long term.

- **Alignment of services:** the service will support and enhance the development and implementation of the BAB initiatives framework, particularly contributing towards BAB's aim of Bristol becoming a WHO Age Friendly City
- **Sharing of learning:** the delivery partner will participate in and contribute to sharing of learning to refine and share practice improvements across BAB projects and delivery partners.

#### **1.4. Service Beneficiaries**

The Integrated Community Clinics Test and Learn project will demonstrate how they will engage with those patients identified by surgeries as being suitable for inclusion in the pilot.

Estimate project beneficiary numbers: It is estimated that up to 20 people would attend any one clinic session and that treatment will take between 12 and 24 weeks to complete. The clinic will be run on a drop in basis so these are estimates and it is anticipated that it will take a while for numbers to get up to capacity.

#### **1.5. Service outcomes**

Bristol Ageing Better has four overall outcome measures that it is expected to reach by the end of the 5-year Programme. The Integrated Community Clinic service will be expected to contribute to helping Bristol Ageing Better meet one or more of the Programme Outcomes:

**Outcome 1:** A 5% increase, in the first 2 years of service delivery, in the number of older people who report that 'they have the amount and type of social contact that they want to reduce isolation and loneliness'. It is Bristol Ageing Better's intention that by March 2020 the increase will 20% and the performance indicator for Year 3 of the service will be negotiated accordingly

**Outcome 2:** A 5% increase, in the first 2 years of service delivery, in the number of older people who report that they can influence decisions that affect their local area and how services are designed and delivered. It is Bristol Ageing Better's intention that by March 2020 the increase will 20% and the performance indicator for Year 3 of the service will be negotiated accordingly

**Outcome 3:** A 10% increase, in the first 2 years of service delivery, in the number of



older people who are able to contribute to their community through such mechanisms as volunteering, belonging to a forum, steering group or other activity. It is Bristol Ageing Better's intention that by March 2020 the increase will 30% and the performance indicator for Year 3 of the service will be negotiated accordingly

**Outcome 4:** Contribution to 2 evaluation and learning reports to service planners and commissioners. This will build an evidence base to ensure that future services in Bristol are better planned and more effective in reducing loneliness and social isolation.

## **2. Terms & Conditions of the Service Level Agreement**

### **2.1. Service Level Agreement Conditions**

2.1.1. Once this Agreement is signed, it will become effective when the funding is received from the Big Lottery Fund.

2.1.2. The Delivery Partner must observe the following conditions. If the Delivery Partner does not, the Lead Partner may by notice require the Delivery Partner to do so.

2.1.3. If the Delivery Partner's failure to do so is material, or if the Delivery Partner's failures are persistent or cumulative, Age UK Bristol may terminate this agreement. If Age UK Bristol terminates this Agreement, the Lead Partner will withdraw funding and may require the Delivery Partner to repay funding that has not been used for the purposes for which the Lead Partner gave it.

2.1.4. The Lead Partner will normally give the Delivery Partner a written notice of a failure or failures that the Lead Partner regard as potentially grounds for termination, and state what the Lead Partner require the Delivery Partner to do to avoid this. However if a failure is serious the Lead Partner may suspend this agreement with immediate effect.

2.1.5. The Lead Partner accepts no liability for any consequences, whether direct or indirect, that may come about from the Delivery Partner's use of this funding, or

withdrawal of this funding. The Delivery Partner shall indemnify the Lead Partner, our employees, agents, officers and sub-contractors with respect to all claims, demands, actions, costs expenses, losses, damages and all other liabilities arising from or incurred by reason of the Delivery Partner's actions and/or omissions in relation to the funding, the non-fulfilment of the Delivery Partner's obligations under this agreement and the Delivery Partner's obligations to third parties.

2.1.6. In the event of conflict between the interpretation of the terms and conditions of grant and those of the Agreement, the Fund's terms and conditions (appended at Schedule 1) will take precedence.

2.1.7. The Agreement will be terminated if for any reason the Big Lottery Fund ('the Fund') needs to suspend or terminate the grant.

## **2.2.Financial, Managerial and Monitoring Conditions**

2.2.1. The Delivery Partner will be responsible for the delivery of their own activities, deliverables and associated outputs and outcomes and will be responsible for collecting and collating performance monitoring information relating to deliverables, outputs and outcomes in accordance with this Agreement

2.2.2. The Delivery Partner must submit performance monitoring information to the Lead Partner's named Contract Manager, using the agreed monitoring framework in section 6 which sets out provider responsibility to work with the Programme-level evaluator.

2.2.3. The Delivery Partner will have full responsibility for ensuring that their own staff and Board members are knowledgeable about the Bristol Ageing Better Programme and will ensure that they receive regular reports and updates to enable them to maximise the opportunities for successful Programme delivery.

2.2.4. The Delivery Partner must not sub-contract any part of the project to other organisations, bodies, individuals or other partners without the written consent of the Lead Partner.

- 2.2.5. The Delivery Partner must not make any changes in the way the Delivery Partner delivers the project without the written consent of the Lead Partner.
- 2.2.6. The Delivery Partner must keep proper accounts in permanent form in order to keep records of all project expenditure and be able to provide evidence of spending to the Lead Partner and the Big Lottery Fund if required.
- 2.2.7. The Lead Partner will pay the Delivery Partner in accordance with the funding letter that shall reflect the funding arrangements agreed between the parties.
- 2.2.8. All payments are subject to the Delivery Partner meeting agreed service activities of the Agreement and compliance with the Partnership Agreement and The Big Lottery Fund's terms and conditions of funding.
- 2.2.9. The Lead Partner will manage and administer a payment system in respect of Delivery Partner claims or invoices directly relating to the Agreement
- 2.2.10. The Lead Partner undertakes to make payment within 30 days of receipt of satisfactory invoices or claims in line with the Payment Schedule in the Service Level Agreement once the Lead Partner has received grant funding from the Fund.
- 2.2.11. The Lead Partner is not liable to make any payments to the Delivery Partner until the Lead Partner has received grant funding from the Fund.
- 2.2.12. The Delivery Partner must give the Representative of the Lead Partner or anyone else the Lead Partner nominates reasonable access to the Delivery Partner's financial records and details of the Delivery Partner's contracts, PAYE/NI deduction sheets and anything else the Lead Partner may need to see to satisfy itself that the Delivery Partner is complying with this Agreement. The Lead Partner must give reasonable notice in this regard and to attend at the Delivery Partner address within usual business hours only.

2.2.13. The Delivery Partner must keep records relating to the Agreement for a period of seven years from the end of the Agreement. This includes financial records (personnel and payroll records). The Delivery Partner must allow the Fund and the National Audit Office access to these records if required. The Lead Partner will provide the Fund with information and documents as required and comply with any reasonable requirements of the fund in relation to visits and meetings within working hours.

2.2.14. At the end of each calendar year, as part of the budget setting process for the following financial year, the Delivery Partner shall have the opportunity to review the level of involvement that they will have in the Project including any services they intend to offer and the amount of accommodation they require to utilise. Any planned change shall be deemed to be confirmation of the Partner Roles for that period.

2.2.15. In the event that the Delivery Partner wishes to withdraw from or make any reduction in the level of the Service agreed at Schedule 2, then it shall give not less than 6 months notice in writing to the Lead Partner (or less notice with agreement of the Lead Partner) at the address provided at 1.1 of this agreement. The Lead Partner and the Delivery Partner will meet as soon as practical after the Delivery Partners intention is declared to agree the best way forward, minimising impact on the service and service users and allowing time for replacing the elements of delivery as required. Agreements reached will be recorded and signed off by both parties as a variation of the Agreement.

2.2.16. Changes shall not be made to this Agreement without prior consultation with and the agreement of the Partners. The Partners agree that any such changes must comply with the BIG Lottery Terms & Conditions and in the event that they do not, the BIG Lottery Terms & Conditions shall take precedence and apply.

## **2.3.General Conditions**

2.3.1. In delivering the Programme activities and projects or services, the Delivery Partner must agree to adhere rigorously to all relevant and applicable internal

policies, procedures and codes of practice. Policies in place should include: Equal Opportunities Policy, Health and Safety Policy, Data Protection/Freedom of Information Policy, Vulnerable Adult Protection Policy or Older Persons Safeguarding Policy, Volunteering Policy and Conflict of Interest.

2.3.2. The Delivery Partner must hold all appropriate Insurance cover.

2.3.3. The Delivery Partner must meet all health and safety regulations and requirements for employees, volunteers and members of the public, and be able to demonstrate that the Delivery Partner can do so.

2.3.4. The Delivery Partner must comply with the requirements of the Data Protection Act 1998 and the Freedom of Information Act 2000. The Delivery Partner must take due consideration to protect any sensitive information and to maintain user confidentiality. Where the Delivery Partner is providing personal services, advice or counselling and if the Delivery Partner holds any personal information, the Delivery Partner must have and implement a written policy of confidentiality.

2.3.5. The Delivery Partner must take all reasonable steps in the provision of the Service Activities in the Agreement and in any other of the Delivery Partner activities to ensure that there is equality of access, use and involvement for everyone and that the Delivery Partner does not discriminate directly or indirectly on grounds of any protected characteristic as defined in the Equality Act 2010. This does not mean that the Delivery Partner's services cannot be targeted at particular equalities groups, where there is evidence of need and a targeted service is the best way of meeting those needs.

2.3.6. The Delivery Partner must comply with the requirements of its safeguarding vulnerable adults and children policy by ensuring that all people who use the Delivery Partner's services/activities and those who come into contact with staff providing support and care (including any children) are, as far as possible, enabled to experience lives which are free and safeguarded from abuse or exploitation.

2.3.7. The Delivery Partner will undertake to permit the copying and use, for the general benefit of the Bristol Ageing Better Partnership, delivery partners and service users, of agreed reports and materials generated by the project providing:

- they are not sold to a third party
- they are not used to the detriment of the Lead or other Partners
- the Delivery Partners' copyright and the fact that they were funded by the Big Lottery Fund is acknowledged

2.3.8. The Bristol Ageing Better Partnership intends to share and build on the successful learning, capacity building, networking and working models that its partners develop together through the funding support so that these can be sustained beyond the period of funding for the benefit of service users. The Delivery Partner will work in the spirit of this intended approach to sustainability.

2.3.9. The Delivery Partner will direct any strategic media enquiries pertaining to Bristol Ageing Better to the Lead Partner contact person named in the Agreement. The Delivery Partner may deal with local media enquiries about their project but must inform the Lead Partner of any such enquiry.

2.3.10. The Delivery Partner must use the Bristol Ageing Better logo and the Fund's branding and logo (which includes use of the National Lottery 'Crossed Fingers' logo) in project literature and marketing material in accordance with the Fund's guidelines; as amended by the Fund from time to time by way of future versions or guidelines which it shall provide to Age UK Bristol.

2.3.11. The Delivery Partner must provide Age UK Bristol with information about the Service described in the Service Level Agreement as may be reasonably required and requested by the Fund, which as public body has to respond to any request for any information about the grant under the Freedom of Information Act.

2.3.12. The terms and conditions of this Partnership Agreement may not be altered

except with the agreement in writing of all parties and subject to the consent of the Fund.

## **2.4.Communication**

- 2.4.1. The Lead Partner representative will be the first point of contact and provide advice or information as appropriate and carry out monitoring visits.
- 2.4.2. The Delivery Partner's representative will undertake to keep the Lead Partner informed of any changes within the organisation affecting the Delivery Partner's service delivery, management functions or financial viability, including any legal claims against the Delivery Partner that relate to the service activities.
- 2.4.3. Any communication about this Agreement will be in writing and sent to the postal or email address of the contacts named in the Service Level Agreement (unless an alternative address has been notified to the other by either party). Delivery of any such communication will be taken as the business day on which it is received.
- 2.4.4. If there is a dispute between the Delivery Partner and other Bristol Ageing Better Partners or the Lead Partner then the Lead Partner will in the first instance arrange a meeting or meetings to reach a resolution of the dispute in question.
- 2.4.5. If the meeting (s) referred to in 2.4.4 does not resolve the matter in question then the parties will attempt to settle it by mediation in accordance with the Centre for Effective Dispute Resolution Model Mediation Procedure or any other model mediation procedure as agreed by the parties.
- 2.4.6. The Lead Partner retains the right to act unilaterally to resolve any conflict in the best interest of The Programme at the direction of the Age UK Bristol Board or the Bristol Ageing Better Programme Board.
- 2.4.7. All materials that are produced from Bristol Ageing Better will make reference to Delivery Partners in relation to their delivery of projects and their involvement

in any activities that contribute to the Programme within the Programme.

### 3. Details of the Service

#### 3.1. Service Activities:

Year One Work Programme (*dates of SLA e.g. April 2017 – March 2018*). See also tender documents for more detail

	ACTIVITY	ESTIMATED TIMESCALE
1.	<u>Quarter 1</u>	
2.	<u>Quarter 2</u>	
3.	<u>Quarter 3</u>	
4.	<u>Quarter 4</u>	
5.	<u>Outputs and Deliverables</u>	
6.	<u>Monitoring, Evaluation &amp; Learning</u>  Ongoing monitoring and evaluation as agreed with the BAB Programme Management team, to include as a minimum:  - Use of Ecorys Common Measurement Framework (CMF) with all project participants (project entry, exit	



	<p>and 6 month follow up)</p> <ul style="list-style-type: none"> <li>- Two case studies from project participants/partners/volunteers</li> <li>- Work with the BAB Learning &amp; Evidence Office to capture ongoing learning from the project</li> </ul> <p>Ongoing engagement in 'test and learn' activities within the BAB programme</p>	
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### 3.2. Personnel and Roles

*Details of any staff involved in project delivery, including those of delivery partner organisations:*

Name, job title, role in project delivery

Name, job title, role in project delivery

*Etc. etc.*

### 3.3. Service Budget

#### 3.3.1. Year One Service Budget Projection ((*dates of SLA e.g. April 2017 – March 2018*).)

Financial Support	Bristol Ageing Better
<i>All costing within this section will be taken from the Tender Submission Form.</i>	
	£xxxx
	£xxxx
	£xxxx
	£xxxx
<b>Total</b>	<b>£sum of above</b>

Existing work and in kind support that complements this project	
<i>Detail of any added value listed in the Tender Submission Form.</i>	
	£xxxx

<b>Total</b>	<b>£ sum of above</b>
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### **TOTAL COSTS £total of both sums above**

\* All service costs are inclusive of any VAT chargeable.

#### **3.3.2. Year One Service Budget: Quarterly budget projection.**

Contributions	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Total
BAB	£ total in 3.3.1 / 4	£ total in 3.3.1 / 4	£ total in 3.3.1 / 4	£ total in 3.3.1 / 4	£ total BAB contribution (should match above)
Name of delivery partner	£ total in kind support above / 4	£ total in kind support above / 4	£ total in kind support above / 4	£ total in kind support above / 4	£ total delivery partner contribution (should match above)
<b>Total</b>	<b>£ Total of BAB and deliver partner above</b>	<b>£ Total of BAB and deliver partner above</b>	<b>£ Total of BAB and deliver partner above</b>	<b>£ Total of BAB and deliver partner above</b>	<b>£ total of both sums above</b>

#### **3.3.3. Year One Payment Schedule (should match table above)**

	Indicative Date	Indicative Payment
First payment	on commencement of project	£ total in 3.3.1 / 4
Second payment	1 <sup>st</sup> July 2017	£ total in 3.3.1 / 4
Third payment	1 <sup>st</sup> October 2017	£ total in 3.3.1 / 4
Fourth payment	1 <sup>st</sup> January 2018	£ total in 3.3.1 / 4
<b>Total</b>		<b>£ total BAB contribution (should match above)</b>

## **4. Monitoring Schedule**

The Delivery Partner will provide the following information to the BAB Programme Manager:

#### **4.1. Six Monthly**

Report confirming compliance with BAB values and commitments.

#### **4.2. Quarterly**

##### **4.2.1. Project Progress Report**

Progress in the delivery of the Service Activities (including project outputs) with explanations of any variance from agreed delivery activities and timescales

##### **4.2.2. Ecorys Common Measurement Framework Questionnaires (project entry, exit and six month participant follow up)**

##### **4.2.3. Service User Equalities Monitoring where appropriate**

##### **4.2.4. Budget Report**

Actual expenditure will be reported quarterly with explanations for any variance from the quarterly budget projection in Section 3.3.

##### **4.2.5. Additional evaluation data as agreed with the APCPC and the BAB Programme Manager but to include participant and volunteer case studies**

#### **4.3. Monthly**

Highlight progress reports identifying any changes to delivery and timescales. This is an opportunity to flag risks and issues at an early stage. These reports will be required initially to support the launch of the service and will be replaced by the Quarterly progress reports when Lead Partner and Delivery Partner can agree.

#### **4.4. Monitoring requirements may be revised or amended to meet the requirements of the Big Lottery Fund**

#### **4.5. Agreed Documents**

In evidencing the delivery of the Integrated Community Clinic project, the Delivery Partners will be expected to provide examples of materials for BAB funded activities including leaflets, posters and minutes of public meetings, where appropriate.

## **5. Contacts for the Agreement**

Until notified otherwise, the contacts for this Agreement are:

**For Age UK Bristol**

Name	<i>Name of BAB contract manager</i>
Address	Canningford House, 38 Victoria Street,
Postcode	Bristol BS1 6BY
E-mail address	<a href="mailto:email@ageukbristol.org.uk">email@ageukbristol.org.uk</a>

**For *name of delivery partner***

Name	<i>Name of contract lead</i>
Address	<i>Delivery partner address</i>
Postcode	<i>Delivery partner postcode</i>
E-mail address	<i>Delivery partner email</i>

## 6. Signed Declaration (Delivery Partner)

On behalf of the organisation named below I agree to the terms of this Service Level Agreement	
Partner Organisation Name	<i>Name of delivery partner</i>
Signatory name	<i>Signatory name</i>
Role in Project Delivery	<i>Role in project e.g. Project Lead</i>
Position in organisation	<i>Position in organisation e.g. Chief Executive</i>
Signed	
Date	

On behalf of Lead Partner	Age UK Bristol
Signatory name	Mark Baker
Position in organisation	Chief Executive
Signed	
Date	