



Equality Impact Assessments

2022/23 Medium Term Financial Plan

Corporate Services – December 2021

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Medium Term Financial Plan Initial Equality Impact Assessment 2022/23

Please add content where << XXX >> is indicated.
Please make Yes or No bold as appropriate.

1. The Proposal

Directorate:	Corporate Services Directorate
Service area:	Cross-cutting
Budget reference:	CORP S1 (a, b, c, d and e)
Budget reduction proposal:	Annual uplift to fees and charges to cover inflationary cost of services
Budget saving for this financial year:	£400,000

Description of the proposal:

The council will continue its policy to apply an annual uplift to the budgets for fees and charges it levies on its services based upon published external inflationary rates.

Summary of changes:

Customers currently pay specific fees and charges for a wide range of activities and services such as building control services, planning application or land charges fees, car parking, leisure activities or care related charges.

Some of these fees and charges are set nationally and the council is legally required to adopt these levels, whilst other fees and charges are set at local levels using the council's discretion.

It is proposed that the budgets associated with the fees and charges levied by the council will be inflated by 1.25% with effect from April 2022 to reflect the council's financial policy of annually inflating charges to cover the increased costs for goods and services.

It should be noted that whilst this increase may be lower than some current national inflationary measures such as the Retail Prices Index or the Consumer Prices Index, the proposed budget increase reflects the average increase in income budgets that is realistically feasible to achieve, and well as the average level of increased costs that the council will incur. For example;

- Not all services can increase their fees – exclusions would include planning fees

- Not all services can generate an increase in the level of income even if fees are inflated by more than the 1.25% - examples include adult social care fees which are limited to the individual circumstance of a customer and their ability to pay

This budget saving sum will be shared across all relevant service area budgets.

Is this a continuation of a previous medium-term financial plan saving?

Yes No

If yes, please insert reference number and year of assessment?

CORP S1 – 2021/22 MTFP budget proposal to increase income budgets

2. Customer equality impact summary

Will the proposal have a disproportionate impact on any of these groups?

Insert X into one box per row, for impact level and type.

H = High, M = Medium, L = Low, N = None

+ = Positive, = = Neutral, - = Negative

Impact Level

Impact type

	H	M	L	N	+	=	-
Disabled people				X		X	
People from different ethnic groups				X		X	
Men or women (including those who are pregnant or on maternity leave)				X		X	
Lesbian, gay or bisexual people				X		X	
People on a low income			X				X
People in particular age groups				X		X	
People in particular faith groups				X		X	

People who are married or in a civil partnership	X		X	
Transgender people	X		X	
Other specific impacts, for example: carers, parents, impact on health and wellbeing. Please specify:	X		X	

3. Explanation of customer impact

Please describe the reasons for the impact level in the table above.

There will be a minimal impact on customers although it is accepted that this may impact on customers with lower income levels should they access a service which has a charge associated with it.

4. Staff equality impact summary

Are there any staffing implications for this proposal? Yes No

Explanation of staff impact

If yes, please describe the nature of the impact, including how many posts could be affected. Please state whether they are vacant, or filled permanently or temporarily.

N/A

5. Consolidation savings

Please complete for medium or high impact areas

Does this budget saving include many service areas/savings/projects?

If so, please identify the areas included in this proposal that could potentially have a medium or high impact for equality groups

Service area	Value of saving
<hr/>	
	Total

6. Review and Sign Off

Service Manager Review

Insert any service manager comments here:

N/A

Is a further detailed equality impact assessment needed? Yes **No**

If 'yes', when will the further assessment be completed? N/A

Service Manager:

Melanie Watts

Date:

24 November 2021

**Medium Term Financial Plan
Initial Equality Impact Assessment 2022/23**

**Please add content where << XXX>> is indicated.
Please make Yes or No bold as appropriate.**

1. The Proposal

Directorate:	Corporate Services
Service area:	Support Services Contract
Budget reference:	CSD S1
Budget reduction proposal:	Increase in trading income – Inspire opportunities
Budget saving for this financial year:	£20,000

Description of the proposal:

To increase external income via the existing trading of the NS Inspire branding.

Summary of changes

Trading 'support services' in association with the Agilisys / Liberata contract with other local authorities via the council's Inspire branding for services such as ICT platform provision & support, exchequer, payroll & HR, customer services (contact centre), business support, Risk, and FOI. It is anticipated that the council will experience a protection and growth in its local support resources to reinforce the additional income.

Is this a continuation of a previous medium-term financial plan saving?

Yes **No**

If yes, please insert reference number and year of assessment?

2020/21 CSD S7

2. Customer equality impact summary

Will the proposal have a disproportionate impact on any of these groups?

Insert X into one box per row, for impact level and type.

H = High, M = Medium, L = Low, N = None

+ = Positive, = = Neutral, - = Negative

Impact Level	Impact type						
	H	M	L	N	+	=	-
Disabled people (Including consideration of neurodiversity)				X		X	
People from different ethnic groups				X		X	
Men or women (including those who are pregnant or on maternity leave)				X		X	
Lesbian, gay or bisexual people				X		X	
People on a low income				X		X	
People in particular age groups				X		X	
People in particular faith groups				X		X	
People who are married or in a civil partnership				X		X	
Transgender people				X		X	
Other specific impacts, for example: carers, parents, impact on health and wellbeing. Please specify:				X		X	

3. Explanation of customer impact

Please describe the reasons for the impact level in the table above.

There should be no impact on customers either internally or externally

Please describe how you will communicate these changes to your customers
N/A

4. Staff equality impact summary

Are there any staffing implications for this proposal? Yes No

Explanation of staff impact

If yes, please describe the nature of the impact, including how many posts could be affected. Please state whether they are vacant or filled permanently or temporarily.

N/A

5. Consolidation savings

Please complete only for medium or high impact areas.

Does this budget saving include many service areas/savings/projects?

If so, please identify the areas included in this proposal that could potentially have a medium or high impact for equality groups

Service area	Value of saving
<hr/>	
Total	

6. Review and Sign Off

Service Manager Review

Insert any service manager comments here:

The proposals will be consistently applied to all teams who manage and deliver internal support services within the corporate services directorate.

Is a further detailed equality impact assessment needed? Yes No

If 'yes', when will the further assessment be completed?

Service Manager:

Stuart Anstead

Date:

8th December 2021

Medium Term Financial Plan Initial Equality Impact Assessment 2021/22

Please add content where << XXX>> is indicated.
Please make Yes or No bold as appropriate.

1. The Proposal

Directorate:	Corporate Services
Service area:	Customer Services
Budget reference:	CSD S2
Budget reduction proposal:	Transformation - Introduce a new Target Operating Model for Customer Services.

Budget saving for this financial year: £25,000

Description of the proposal:

Please note this is second year of the implementation of the changed target operating model for Customer Services. Planned changes took effect from the 1 July 2021.

The Town Hall gateway reception is no longer staffed full time and the enquiry desk is only open for pre-booked appointments.

Face-to-face appointments are available by prior arrangement, with the request triaged over the phone to check whether a visit is necessary. This will mean that the contact centres will first assess whether the matter can be dealt with either over the phone or digitally. If it cannot (example, help completing a blue badge application), then an appointment is arranged.

Due to Covid 19 we trialled this approach by default. We found that there are very few enquiries which can't be dealt with over the phone or digitally. Customers can contact us in multiple ways: by telephone, by online enquiry form, complaint request, online reporting, etc.

Support for completing blue badge applications was trialled with the Library service in 2021 as this is the area of highest demand and it would be beneficial to customers if support was available more locally to them through the Library network. However, the Library team found that the process was too lengthy, and this returned to the appointments process.

During 2021/22 it has become apparent that changing the behaviour of customers will require further messaging and reinforcement due to a small number of customers dropping into the Town Hall Gateway without appointments. Additionally, there are a small number of changes required to support the concierge service to assist in triaging visitors, supporting drop-in visitors and providing security to the extended opening hours of Weston Library.

It feels inevitable that making such a change will take time to embed and we need to change the environment to reflect the new service, for example removing the large reception desk and improving signage and communications.

Volume comparisons for the month of September each year are shown below:

Year (Sept only)	Appointments
2019	2781
2020	11
2021	85

In terms of consultation, the proposal was taken to the Community and Corporate organisation policy and scrutiny panel in November 2020 and will be discussed at an online session with the Citizens Panel in December 2020. It is anticipated that there will be consultation in January 2021 with the Equalities Group and further consultation as we move forward with the proposal.

Summary of changes:

Appointments which are usually carried out by the Agilisys reception team will be by appointment only and arranged after triage. Arrangements for support with Blue badge enquiries will be reviewed further.

Some investment will be made into the Council Connect contact centre to support any additional calls and to triage and arrange appointments.

Is this a continuation of a previous medium-term financial plan saving?

Yes **No**

If yes, please insert reference number and year of assessment?

CSD S3 - Gateway

2. Customer equality impact summary

Will the proposal have a disproportionate impact on any of these groups?

Insert X into one box per row, for impact level and type.

H = High, M = Medium, L = Low, N = None

+ = Positive, = = Neutral, - = Negative

Impact Level	Impact Level				Impact type		
	H	M	L	N	+	=	-
Disabled people		X					X
People from different ethnic groups			X				X
Men or women (including those who are pregnant or on maternity leave)				X		X	
Lesbian, gay or bisexual people				X		X	
People on a low income		X					X
People in particular age groups			X				X
People in particular faith groups				X		X	
People who are married or in a civil partnership				X		X	
Transgender people				X		X	
Other specific impacts, for example: carers, parents, impact on health and wellbeing. Please specify:							

3. Explanation of customer impact

Please describe the reasons for the impact level in the table above.

Some investment has been made into the Council Connect contact centre to support additional calls and to triage and arrange appointments.

- Whilst the opportunity to have a face-to-face appointment still exists, it requires a phone call in order to be triaged.
- It is no longer possible to walk into the building and expect to be seen immediately. Having said that, in practice we have helped those in most need as quickly as possible, for example those presenting as homeless.
- There are more limited times in which people can be seen face to face, although in reality we could be flexible where needed.
- It may be more expensive for some people to call than to walk in if they live locally.
- If English is not your first language, you may have a preference for seeing someone face to face. This is still be possible, but not on demand.
- Some older people may have a preference for talking directly to someone, but again, this is possible but not on demand.
- There may be an impact on some disabled people, for example those who have poor motor skills so cannot complete forms online or those with hearing impairments that cannot use the phone may prefer to talk to someone face to face.
- Discussions are ongoing with Libraries Services over the wider provision of elementary customer contact services at all Libraries across the authority.
- The 2022 Customer Service Strategy will consider the adoption of a community hub model which would provide targeted support for vulnerable customer groups via dispersed in locations around the authority.

Through consultation and review of the information held about the service thought is being given to the mitigating actions that will be implemented to continue to support those who cannot access services online and or over the phone.

4. Staff equality impact summary

Are there any staffing implications for this proposal? No Yes

Explanation of staff impact

If yes, please describe the nature of the impact, including how many posts could be affected, please state whether they are vacant, or filled permanently or temporarily.

There will be an impact on the staff who currently provide the service. More detailed information will be provided in the detailed Equality Impact Assessment.

5. Consolidation savings

Please complete for medium or high impact areas

Does this budget saving include many service areas/savings/projects?

If so, please identify the areas included in this proposal that could potentially have a medium or high impact for equality groups

Service area	Value of saving
Total	

6. Review and Sign Off

Service Manager Review

Insert any service manager comments here:

Is a further detailed equality impact assessment needed? No **Yes**

If 'yes', when will the further assessment be completed?

January 2022

Service Manager: Simone Woolley

Date: 6 December 2021

Medium Term Financial Plan

Initial Equality Impact Assessment 2022/23

Please add content where << XXX>> is indicated.
Please make Yes or No bold as appropriate.

1. The Proposal

Directorate:	Corporate Services
Service area:	Support Services
Budget reference:	CSD S3
Budget reduction proposal:	Contracted Support Services - Business Support
Budget saving for this financial year:	£50,000

Description of the proposal:

The budget reduction proposed relates to the opportunity to reduce costs in areas positively impacted by changed working arrangements through the increased use of Teams and Microsoft 365 and working from home. They relate to the costs of physical and electronic storage, business support requirements (both those contracted and provided in-house) and a reduction in print.

Summary of changes:

The review of contracted Business Support relates to a review of the council's specification for business support services to ensure that it reflects new ways of working and meets the council's requirements. Changes may be triggered by changed business requirements, the introduction of new technology (existing) or new developments in automation.

The budget reduction associated with the review for 2022/23 is £50,000. It will require engagement with all the council services that current receive business support through the support services contract. Savings from 2021/22 focused on reductions in Adults and Children's services and while the review will concentrate on the other directorates there is an acknowledged challenge to deliver this level of savings.

Is this a continuation of a previous medium-term financial plan saving?

Yes **No**

If yes, please insert reference number and year of assessment?

2. Customer equality impact summary

Will the proposal have a disproportionate impact on any of these groups?

Insert X into one box per row, for impact level and type.

H = High, M = Medium, L = Low, N = None

+ = Positive, = = Neutral, - = Negative

Impact Level	Impact type						
	H	M	L	N	+	=	-
Disabled people				X			
People from different ethnic groups				X			
Men or women (including those who are pregnant or on maternity leave)				X			
Lesbian, gay or bisexual people				X			
People on a low income				X			
People in particular age groups				X			
People in particular faith groups				X			
People who are married or in a civil partnership				X			
Transgender people				X			
Other specific impacts, for example: carers, parents, impact on health and wellbeing. Please specify:				X			

3. Explanation of customer impact

Please describe the reasons for the impact level in the table above.

The proposal outlined are not predicated on delivering different outcomes or impact to customers.

4. Staff equality impact summary

Are there any staffing implications for this proposal? **Yes** **No**

Explanation of staff impact

If yes, please describe the nature of the impact, including how many posts could be affected, please state whether they are vacant, or filled permanently or temporarily.

The proposal has no direct impact on council staff because resources form part of the Agilisys contract. Any service change effects will be managed to minimise the impact on customers (retained staff).

5. Consolidation savings

Please complete for medium or high impact areas

Does this budget saving include many service areas/savings/projects?

If so, please identify the areas included in this proposal that could potentially have a medium or high impact for equality groups

Service area	Value of saving
	Total

6. Review and Sign Off

Service Manager Review

Insert any service manager comments here:

Is a further detailed equality impact assessment needed? **Yes** **No**

If 'yes', when will the further assessment be completed?

Service Manager: Stuart Anstead

Date: 6 December 2021

Medium Term Financial Plan Initial Equality Impact Assessment 2021/22

Please add content where << XXX>> is indicated.
Please make Yes or No bold as appropriate.

1. The Proposal

Directorate:	Corporate Services
Service area:	Support Services
Budget reference:	CSD S4
Budget reduction proposal:	Contracted Support Services - Review of contracted support cost base provision
Budget saving for this financial year:	£50,000

Description of the proposal:

Changes and reductions within the Support Services contract, including Value for Money service reviews and release of inflation provision within the base budget. The proposal includes a reduce the support services budget associated with the inflation growth from the previous year.

Summary of changes:

Inflationary reduction - previous budget provision established for contract inflation is not required and can be released as an ongoing reduction of **£50,000** for 22/23. This has no impact on service delivery or detrimental customer impact.

Is this a continuation of a previous medium-term financial plan saving?

Yes No

If yes, please insert reference number and year of assessment?

CSD S5 – Support Services Contract

2. Customer equality impact summary

Will the proposal have a disproportionate impact on any of these groups?

Insert X into one box per row, for impact level and type.

H = High, M = Medium, L = Low, N = None

+ = Positive, = = Neutral, - = Negative

Impact Level	Impact type						
	H	M	L	N	+	=	-
Disabled people				X			
People from different ethnic groups				X			
Men or women (including those who are pregnant or on maternity leave)				X			
Lesbian, gay or bisexual people				X			
People on a low income				X			
People in particular age groups				X			
People in particular faith groups				X			
People who are married or in a civil partnership				X			
Transgender people				X			
Other specific impacts, for example: carers, parents, impact on health and wellbeing. Please specify:							

3. Explanation of customer impact

Please describe the reasons for the impact level in the table above.

It is not anticipated that there will be any impact on customers as a result of this proposal.

4. Staff equality impact summary

Are there any staffing implications for this proposal? Yes No

Explanation of staff impact

If yes, please describe the nature of the impact, including how many posts could be affected, please state whether they are vacant, or filled permanently or temporarily.

None.

5. Consolidation savings

Please complete for medium or high impact areas

Does this budget saving include many service areas/savings/projects?

If so, please identify the areas included in this proposal that could potentially have a medium or high impact for equality groups

Service area	Value of saving

6. Review and Sign Off

Service Manager Review

Insert any service manager comments here:

Is a further detailed equality impact assessment needed? Yes No

If 'yes', when will the further assessment be completed?

Service Manager:

Stuart Anstead

Date:

8 December 2021

**Medium Term Financial Plan
Initial Equality Impact Assessment 2022/23**

**Please add content where << XXX>> is indicated.
Please make Yes or No bold as appropriate.**

1. The Proposal

Directorate:	Corporate Services
Service area:	Whole directorate
Budget reference:	CSD S5
Budget reduction proposal:	Internal Support Services - Review of operational staffing and support costs
Budget saving for this financial year:	£100,000

Description of the proposal:

To review and reduce the costs of internally managed teams who provide support services.

Summary of changes

A review of the staffing and support costs has been undertaken for services and changes will be made to the budgets which align them to actual levels of cost and activity.

Examples of changes include;

- reducing the mileage and travel budgets as these sums are not being fully spent following changes to new ways of working;
- reducing other supplies and services budgets (e.g. conferences) as a lot of professional networking, conference activity and broader learning and development is being provided online at lower costs;
- an increase in the turnover factor from 4% to 5% for internal support service teams to better reflect recruitment profiles and timescales across the directorate; and
- a review of starters and leavers to align staffing budgets to the current establishment.

Is this a continuation of a previous medium-term financial plan saving?

Yes **No**

If yes, please insert reference number and year of assessment?

N/A

2. Customer equality impact summary

Will the proposal have a disproportionate impact on any of these groups?

Insert X into one box per row, for impact level and type.

H = High, M = Medium, L = Low, N = None

+ = Positive, = = Neutral, - = Negative

Impact Level

Impact type

	H	M	L	N	+	=	-
Disabled people (Including consideration of neurodiversity)				X		X	
People from different ethnic groups				X		X	
Men or women (including those who are pregnant or on maternity leave)				X		X	
Lesbian, gay or bisexual people				X		X	
People on a low income				X		X	
People in particular age groups				X		X	
People in particular faith groups				X		X	
People who are married or in a civil partnership				X		X	
Transgender people				X		X	
Other specific impacts, for example: carers, parents, impact on health and wellbeing. Please specify:				X		X	

3. Explanation of customer impact

Please describe the reasons for the impact level in the table above.

There should be no impact on customers either internally or externally

Please describe how you will communicate these changes to your customers
N/A

4. Staff equality impact summary

Are there any staffing implications for this proposal? Yes No

Explanation of staff impact

If yes, please describe the nature of the impact, including how many posts could be affected. Please state whether they are vacant or filled permanently or temporarily.

Although there will be no direct impact on current staff within this proposal, the increased vacancy management targets may result in slightly longer periods before recruitment activity is completed.

5. Consolidation savings

Please complete only for medium or high impact areas.

Does this budget saving include many service areas/savings/projects?

If so, please identify the areas included in this proposal that could potentially have a medium or high impact for equality groups

Service area	Value of saving
<hr/>	
	Total

6. Review and Sign Off

Service Manager Review

Insert any service manager comments here:

The proposals will be consistently applied to all teams who manage and deliver internal support services within the corporate services directorate.

Is a further detailed equality impact assessment needed? Yes No

If 'yes', when will the further assessment be completed?

Service Manager:

Amy Webb

Date:

24th November 2021

Medium Term Financial Plan Initial Equality Impact Assessment 2022/23

Please add content where << XXX>> is indicated.
Please make Yes or No bold as appropriate.

1. The Proposal

Directorate:	Corporate Services Directorate
Service area:	Corporate Finance
Budget reference:	CSD S6 and S7
Budget reduction proposal:	Reductions in Former Employees Pension Costs & Premises
Budget saving for this financial year:	£50,000 and £50,000

Description of the proposal:

To reduce the expenditure budgets associated with former employees and operational buildings.

Summary of changes:

The council's revenue budget currently has provision of approximately £1.5m to cover the costs associated with employees leaving, or those that have historically left the organisation.

The majority of the budget relates to ongoing pension related costs of former employees and it is this cost which reduces naturally over time as the council's obligations cease. The savings proposal does not relate to a change in policy or approach, it reflects the realignment of the budget mapped to actual levels of cost.

The savings proposal also seeks to realign the budgets associated with the council's operational building costs that are likely to be incurred in the future following changes to the way the council works and how services are delivered.

The Covid-19 pandemic has shown that there are different ways of working and that it is not necessary for staff to attend the office as much, which means that there have been some natural efficiencies associated with the buildings and it has not been necessary to incur as much cost – this change of approach also supports the council's vision for climate change. It is

anticipated that the new ways of working will continue into the future and become part of the council's updated target operating model.

Is this a continuation of a previous medium-term financial plan saving?

Yes No

If yes, please insert reference number and year of assessment?

CSD S8 – 2021/22 MTFP budget reduction proposal to reduce pension costs

2. Customer equality impact summary

Will the proposal have a disproportionate impact on any of these groups?

Insert X into one box per row, for impact level and type.

H = High, M = Medium, L = Low, N = None

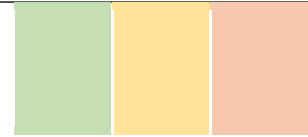
+ = Positive, = = Neutral, - = Negative

Impact Level

Impact type

	H	M	L	N	+	=	-
Disabled people				X		X	
People from different ethnic groups				X		X	
Men or women (including those who are pregnant or on maternity leave)				X		X	
Lesbian, gay or bisexual people				X		X	
People on a low income				X		X	
People in particular age groups				X		X	
People in particular faith groups				X		X	
People who are married or in a civil partnership				X		X	
Transgender people				X		X	
Other specific impacts, for example: carers, parents, impact on health and wellbeing.				X		X	

Please specify:



3. Explanation of customer impact

Please describe the reasons for the impact level in the table above.
There should be no impact on customers either internally or externally

4. Staff equality impact summary

Are there any staffing implications for this proposal? Yes **No**

Explanation of staff impact

If yes, please describe the nature of the impact, including how many posts could be affected. Please state whether they are vacant, or filled permanently or temporarily.

Although there are no posts effected by this proposal, the council's New Ways of Working will impact upon the way that our employees work, any equality impacts of this are being given careful consideration through the development of the Council's Accommodation Strategy.

5. Consolidation savings

Please complete for medium or high impact areas

Does this budget saving include many service areas/savings/projects?

If so, please identify the areas included in this proposal that could potentially have a medium or high impact for equality groups

Service area	Value of saving
<hr/>	
<hr/>	
Total	

6. Review and Sign Off

Service Manager Review

Insert any service manager comments here:

N/A

Is a further detailed equality impact assessment needed?

Yes

No

If 'yes', when will the further assessment be completed?

N/A

Service Manager:

Melanie Watts

Date:

24 November 2021

Medium Term Financial Plan

Initial Equality Impact Assessment 2022/23

Please add content where << XXX>> is indicated.
Please make Yes or No bold as appropriate.

1. The Proposal

Directorate:	Corporate Services Directorate
Service area:	Corporate Finance
Budget reference:	CSD S8 and S9
Budget reduction proposal:	Increase in investment interest following rise in market rates AND Reduction in debt costs and charges (Avon Loan Debt & RIF)
Budget saving for this financial year:	£281,000 (£162,000 and £119,000)

Description of the proposal:

The council will seek to achieve a net reduction in the amount it pays for its capital financing costs and also increase the investment yields it achieves on its external investments.

Summary of changes:

The council currently generates interest on its surplus cash balances by investing these sums in accordance with the approved treasury management strategy – it is anticipated that more income could be generated through a combination of rising bank interest rates and also changes within levels of cash-flow and the portfolio mix.

The council has a series of long-term loans which have been taken out in previous years to finance expenditure charged to the capital programme, which are largely fixed in terms of both interest rate and repayment period. The revenue budget is charged with the associated capital financing costs, which include the annual interest payable to the lender, as well as a sum set aside in respect of the repayment of the principal sums. The council is also responsible for a share of the long-term debt balance for the former Avon County Council, which is managed by Bristol City Council. Both of these debt balances show that some loans will mature in future years which will reduce

the charge to the annual revenue budget.

Is this a continuation of a previous medium-term financial plan saving?

Yes No

If yes, please insert reference number and year of assessment?

CSD S27 – 2020/21 MTFP budget reduction proposal to reduce borrowing costs

2. Customer equality impact summary

Will the proposal have a disproportionate impact on any of these groups?

Insert X into one box per row, for impact level and type.

H = High, M = Medium, L = Low, N = None

+ = Positive, = = Neutral, - = Negative

Impact Level

Impact type

	H	M	L	N	+	=	-
Disabled people				X		X	
People from different ethnic groups				X		X	
Men or women (including those who are pregnant or on maternity leave)				X		X	
Lesbian, gay or bisexual people				X		X	
People on a low income				X		X	
People in particular age groups				X		X	
People in particular faith groups				X		X	
People who are married or in a civil partnership				X		X	
Transgender people				X		X	
Other specific impacts, for example: carers, parents, impact on health and wellbeing. Please specify:				X		X	

3. Explanation of customer impact

Please describe the reasons for the impact level in the table above.
There should be no impact on customers either internally or externally

4. Staff equality impact summary

Are there any staffing implications for this proposal? Yes No

Explanation of staff impact

If yes, please describe the nature of the impact, including how many posts could be affected. Please state whether they are vacant, or filled permanently or temporarily.

N/A

5. Consolidation savings

Please complete for medium or high impact areas

Does this budget saving include many service areas/savings/projects?

If so, please identify the areas included in this proposal that could potentially have a medium or high impact for equality groups

Service area	Value of saving
<hr/>	
Total	

6. Review and Sign Off

Service Manager Review

Insert any service manager comments here:

N/A

Is a further detailed equality impact assessment needed? Yes No

If 'yes', when will the further assessment be completed? N/A

Service Manager:

Melanie Watts

Date:

24 November 2021

Medium Term Financial Plan

Initial Equality Impact Assessment 2022/23

Please add content where << XXX>> is indicated.
Please make Yes or No bold as appropriate.

1. The Proposal

Directorate:	Corporate Services Directorate
Service area:	Corporate Finance
Budget reference:	CSD S10
Budget reduction proposal:	Transformation initiatives relating to contracted support services
Budget saving for this financial year:	£75,000

Description of the proposal:

To reduce expenditure across the directorate following the implementation of projects within the directorate transformation programme.

Summary of changes:

Over the past 18 months the Covid-19 pandemic has shown that there are many different ways of working to deliver services and so change that was previously considered as difficult to implement or potentially not possible, has been delivered and potentially at a much faster pace than would have been thought possible.

The directorate has therefore developed a series of individual projects aimed at delivering change, efficiencies and improvements within its services. These projects form the basis of the directorate priorities for the year ahead and have been categorised into the following themes as part of its overarching transformation programme;

- Digital and ICT strategy
- Customer and communications
- Smarter working
- Information management and data insight
- Service reviews
- People's strategy

Several of the projects link with each other and so there are dependencies and cross cutting benefits, although the outcomes for each project vary,

which means that some of the benefits will unlock operational capacity (e.g.

smarter working and people's services proposals), whilst others will bring cashable savings (e.g. digital proposals).

Is this a continuation of a previous medium-term financial plan saving?

Yes **No**

If yes, please insert reference number and year of assessment?

N/A

2. Customer equality impact summary

Will the proposal have a disproportionate impact on any of these groups?

Insert X into one box per row, for impact level and type.

H = High, M = Medium, L = Low, N = None

+ = Positive, = = Neutral, - = Negative

Impact Level

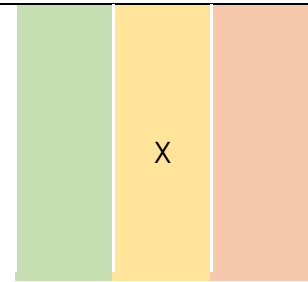
Impact type

	H	M	L	N	+	=	-
Disabled people			X				X
People from different ethnic groups				X		X	
Men or women (including those who are pregnant or on maternity leave)				X		X	
Lesbian, gay or bisexual people				X		X	
People on a low income			X				X
People in particular age groups			X				X
People in particular faith groups				X		X	
People who are married or in a civil partnership				X		X	
Transgender people				X		X	

Other specific impacts, for example: carers, parents, impact on health and wellbeing.

Please specify:

X



3. Explanation of customer impact

Please describe the reasons for the impact level in the table above.

The projects within the transformation programme are aimed at improving customer experiences, whether that be internal or external customers. Examples include; implement changes to MyAccount, introduction of Chatbox facilities, improving the council's website, updating the corporate training database system.

However, we are aware of the potential for a negative impact on some of our customer groups including disabled people, those who are older and who may have a low income so each project listed in the Summary of Changes will be subject to a separate Equality Impact Assessment as the project develops to ensure thorough analysis and consideration of mitigating actions is taken.

4. Staff equality impact summary

Are there any staffing implications for this proposal? Yes No

Explanation of staff impact

If yes, please describe the nature of the impact, including how many posts could be affected. Please state whether they are vacant, or filled permanently or temporarily.

N/A

5. Consolidation savings

Please complete for medium or high impact areas

Does this budget saving include many service areas/savings/projects?

If so, please identify the areas included in this proposal that could potentially have a medium or high impact for equality groups

Service area	Value of saving
<hr/>	
	Total

6. Review and Sign Off

Service Manager Review

Insert any service manager comments here:

N/A

Is a further detailed equality impact assessment needed?	Yes	No
If 'yes', when will the further assessment be completed?	N/A	

Service Manager:

Melanie Watts

Date:

24 November 2021

Medium Term Financial Plan Equality Impact Assessment Updated for 2022/23

Please add content where << XXX>> is indicated. Please make Yes or No bold as appropriate.

Service area:	Customer Services
Budget reference:	CSD S2
Budget reduction proposal:	Transformation - Introduce a new Target Operating Model for Customer Services.
Budget saving for this financial year:	£25,000
Equality impact assessment owner:	Simone Woolley
Assistant Director/Director sign off:	Amy Webb
Review date:	5 th January 2022

1. Equality Impacts

Please make High, Medium or Low bold as appropriate

Service User Impact

Before mitigating actions	High	Medium	Low
After mitigating actions	High	Medium	Low

Staff Impact

Before mitigating actions

High

Medium

Low

After mitigating actions

High

Medium

Low

2. The Proposal

2.1 Background to proposal

(Please provide a brief explanation of the project/proposals. You should consider the impact on both customers and staff)

Please note this is second year of the implementation of the changed target operating model for Customer Services. Planned changes took effect from the 1 July 2021.

The Town Hall gateway reception is no longer staffed, and we offer an appointment only service.

Face-to-face appointments are available by prior arrangement, with the request triaged over the phone to check whether a visit is necessary. This will mean that the contact centres will first assess whether the matter can be dealt with either over the phone or digitally. If it cannot (example, help completing a blue badge application), then an appointment is arranged.

Due to Covid 19 we trialled this approach by default. We found that there are very few enquiries which can't be dealt with over the phone or digitally. Customers can contact us in multiple ways: by telephone, by online enquiry form, complaint request, online reporting, social media, etc.

Support for completing blue badge applications was trialled with the Library service in 2021 as this is the area of highest demand and it would be beneficial to customers if support was available more locally to them through the Library network. However, the Library team found that the process was too lengthy, and this returned to the appointments process.

During 2021/22 it has become apparent that changing the behaviour of customers will require further messaging and reinforcement due to a small number of customers dropping into the Town Hall Gateway without appointments. Additionally, there are a small number of changes required to support the concierge service to assist in triaging visitors, supporting drop-in visitors, and providing security to the extended opening hours of Weston Library. The role of the concierge is currently being reviewed to look for the best option going forward.

Inevitably making such a change takes time to embed and we need to change the environment to reflect the new service, for example removing the large reception desk and improving signage and communications. These arrangements are in the process of being made so we will see changes in the environment in early 2022.

Volume comparisons for the month of September each year are shown below:

Year (Sept only)	Appointments
2019	2781
2020	11
2021	85

In terms of consultation, the original proposal was taken to the Community and Corporate organisation policy and scrutiny panel in November 2020 and was discussed at an online session with the Citizens Panel in December 2020. There was consultation in January 2021 with the Equalities Stakeholder Group and further consultation in January 2022.

2.2 Please detail below how this proposal may impact on any other organisation and their customers

There may be an impact on other organisations such as the voluntary sector if customers feel that they are not able to get the service they need from the council in the way that they want it. Potentially they may refer to, for example, Citizens Advice, who similarly support customers by telephone where possible and face to face through prior appointment only. During the consultation with Equality Stakeholders in January 2022, Citizens Advice North Somerset were asked for more information about the potential impact on their services as a result of the council's approach to customer services to help us to understand this potential impact in more detail.

Section 3 – What Do We Know?

1.1 Customer/staff profile details – what data or evidence is there which tells us who is, or could be, affected?

We keep records of why people visit the Town Hall.

Looking at data for December 2021:

Blue Badge Appointments	38
Scanning Documents	15
Other	10

It is difficult to assess impact on groups, however, we have seen from recent volumes and reasons for appointment that the majority are customers who need assistance with their blue badge applications or with scanning documents, therefore people who are likely more digitally excluded.

1.2 What does the data or evidence tell us about the potential impact on diverse groups, and how is this supported by historic experience/data?

Most of the customers who are visiting us are blue badge holders or are looking for help scanning documentation. This would suggest that the customers most in need of a face-to-face service are those with a disability or those who find it difficult to use digital technology. This pattern of face-to-face customers has been consistent over the period of appointment only and therefore we can assume that these groups are those most in need of the service.

1.3 Are there any gaps in the data, for example across protected characteristics where information is limited or not available?

We do not ask our callers or visitors for their demographic information, and we do not necessarily know if someone has visited the town hall and was given a number to call, and therefore part of the group that we wish to understand more deeply. We would welcome advice from the Equality Stakeholder Group on what should be monitored and the methods to use and have made plans for further consultation in this area.

1.4 How have we involved or considered the views of the people that could be affected?

For the Council Tax and benefits service, without set appointment times our Town Hall team have been able to deal with more customers and deal with them quicker than would have previously been the case. This service has, in most cases, been very well received by the customers.

We have received two formal complaints from customers about the changes in the Town Hall gateway. The dates for these were 24/6/21 and 10/11/21. The issues raised were:

- It's harder to access services if you don't have the internet
- Older person unable to go online

Prior to going live with the service, we held a consultation exercise with the Citizens Panel to ask for their feedback on the issue of changing the face-to-face service in the town hall. We asked for their thoughts on how this change could affect people and their ability to access council services.

Feedback suggested that:

- Housing needs may be urgent (these are managed by the Housing team)
- They like the online reporting forms

- They feel that older people may prefer telephone or face to face over digital
- Face to face should continue in some way
- If a query can't be answered, then a follow up appointment should be used

We have worked with Housing to ensure that urgent needs are met, and a space has been created for the team in the pod area of the town hall gateway for emergency appointments.

We have improved the online reporting functionality.

We have not reduced our telephony offer and continue to support face to face to meet current demand of c.80 appointments a month.

If a query can't be answered over the phone, an appointment is arranged.

In January 2021 we shared this Equality Impact Assessment with a group of representatives from Equality Groups working across North Somerset. They provided helpful, constructive feedback in relation to this proposal.

Consultation Comment	Response
<p>Consideration should be given to mitigating the impact of the proposed focus on telephony services on the deaf community. This should be more explicit in the EIA. A Textphone and BSL relay service should be considered.</p>	<p>Consideration of the implementation of relevant technology will be added to the mitigation in the EIA.</p> <p>This still needs to be actioned and we would value support from the community in doing this.</p>
<p>The council should make it clearer in its communications what is meant by the contact centre. Can we publicise which number should be called for which services.</p>	<p>We reviewed the communications about the service and reviewed the website content. The switchboard number is advertised in our contact us page.</p> <p>We are in the process of developing a new customer service strategy and we will be reviewing contact methods and routes as part of this.</p>
<p>The amount of information that is given in recorded messages on the telephone seems excessive, particularly for those who have difficulty processing information. Can this information be reviewed to ensure it is all essential? Also reviewing the number of times that</p>	<p>We are reviewing all our IVR (Interactive Voice Response service) messages and will update in Q1 2022. This review has been delayed due to the constant changes to the IVR during the pandemic, the subsequent introduction of various grant</p>

<p>customers are asked to go online to be considered as it can be frustrating for those who cannot access services in this way.</p>	<p>schemes and during the period when we have had garden waste issues.</p>
<p>There is now too much emphasis being given to contacting the council by phone, can a text service, text phone and email address also be considered?</p> <p>Can the webchat facility be advertised/used more often?</p>	<p>We promote the use of eforms (same as email but structured). The contact us page offers this option.</p> <p>We need to review the option of a text service – this is not something we have done before.</p> <p>We are in the process of upgrading our web chat which will be live early 2022 and advertised on the website.</p>
<p>For some, particularly for those with a learning disability or for someone whose first language is not English the confidence to talk over the phone will be a barrier to accessing services.</p>	<p>This has been noted, we will continue to offer face to face appointments for customers who are unable to access services over the telephone. This issue has been included in our training plans.</p>
<p>Information about a person's well-being can be missed when you aren't able to meet face to face. What training will be provided to staff to ensure that important information is not missed. This is particularly important for people with a learning disability. Can a plan for this be added to the mitigation?</p>	<p>This important point has been noted and has been included in our training plans.</p>
<p>Can the approach to monitoring the impact on equality groups be improved as this approach is developed?</p>	<p>The data we have about people accessing customer services will continue to be considered, including the information we hold on equality groups. We categorise the customers that are visiting the town hall so that we understand their needs and can focus on supporting those in the best way possible. We will seek advice from the Stakeholder group on how else to monitor equality groups.</p>
<p>How will members of the public be able to access the police information desk?</p>	<p>The police to have their own separate space in the town hall with a separate entrance.</p>

Will the concierge be able to offer any kind of support to those who come along to the town hall?	Yes, outside of COVID restrictions the concierge will be able to offer basic information and advice, including providing access to a telephone if customers do not have phone credit or access to a phone. We have created a useful telephone number list which the concierge gives out so that customers can get through to the right department for their needs.
Equality stakeholders offered their support to discuss any access or equality issues encountered through the transformation of this service.	Service leader will attend a future Equality Stakeholder Meeting with an update.

Further consultation was facilitated with Equality Stakeholder Group in January 2022, their feedback included:

Consultation Comments/questions	Response
Members of the group were pleased to see and be involved with the ongoing consideration of equality issues in this area. Specifically, ongoing consultation with local Deaf Community, representatives from Vision North Somerset and the Disability Access Group.	Service leader to attend meetings with the deaf community on 7 February 2022 and 17 February 2022, and with the Access Group during February 2022 (date tbc).
Call for a review of the council's auto-messaging service as there is still too much emphasis on accessing online services.	Service leader to review Interactive voice response systems for all contact centres to ensure that the messages are shorter and to reduce repetition around the online offer.
How aware is the council about the demographics of those in North Somerset who are digitally excluded?	A working group has already been established as this is recognised as an area where we lack a full understanding.
As the application for Blue Badges seem to be challenging for a wide range of people how can the council improve this process?	Service leader intends to review the process in order to see how it can be made more accessible to all.
Council should acknowledge that the cost of IT equipment and 'data' will	This is acknowledged and the contact centres remain open, opening hours are

mean that some people cannot access our services digitally.	unchanged. The wider organisation is working on a number of initiatives around digital exclusion in order to work to address this.
Review of 'contact us' page on Council website to be reviewed as not all options included.	Agreed, this is part of an existing work plan and a review of contact points more generally will be included in the customer service strategy which is currently in development.

1.5 What has this told us?

It suggests that there is an understanding that we can move away from face-to-face appointments for all, but that we need to ensure that the offer is still there for people who really need it. Evidence from the contact centre would suggest that we have successfully dealt with most people's enquiries over the phone, and the lack of complaints would suggest that customers are largely satisfied, although further consultation needs to be done to ensure that this is accurate. We need to ensure that our service is appropriate for the needs of all equality groups including those who are deaf or who have a hearing impairment, who have a learning disability, visual impairment or who do not speak English as a first language.

For example, in our Council Tax and Benefit service, our letters, emails, IVR (Interactive Voice Response system) and customer service advisors will direct customers to self-serve. Where self-service is not an option the call advisor will support the customer.

All call advisors, as part of their induction, receive training on how to identify all different types of vulnerability along with details of the support organisations that customer can be referred to.

- Deaf/hard of hearing customers – Customers regularly contact us using the RNID's Relay UK service (<https://rnid.org.uk/information-and-support/technology-and-products/relay-uk/>). The customer will text an intermediary who will speak to an advisor on the customers behalf and they will relay the response back to the customer by text. We will also speak to 3rd parties on the customers behalf if we have authority to do so or the customer is able to pass data protection checks.
- Language barriers - We will also speak to 3rd parties on the customers behalf if we have authority to do so or the customer is able to pass data protection checks. Very occasionally, we have also made use of the Language line service used by the Council using our locally based customer service team.

- Vulnerable customers - We will also speak to 3rd parties on the customers behalf if we have authority to do so or the customer is able to pass data protection checks. We will also signpost customers to organisations that may be able to assist them.

Consultation with equality groups is ongoing to ensure we fully understand these issues and we are mitigating the impact wherever possible.

Average abandonment rates in the contact centre are within tolerance which demonstrates that there is good availability in terms of getting through to talk an adviser.

For Council Tax and benefits, although a telephone appointment is currently the default method of dealing with customer enquiries the Town Hall appointment service is still available if customers are unable to liaise with us by any other method. As with home visits we have a criteria for face-to-face appointments – customer has an illness/disability preventing them from using the telephone or have a vulnerability making it more effective to be dealt with face to face. This second criteria we expect to be mainly used by our First Steps service for customers who are not being assisted by external support agencies (e.g., Citizens Advice).

With regards the First Steps service, we do have criteria in place to determine whether a customer is eligible for a home visit. Details of the visit qualifying criteria for customers of the Revenues and Benefits service are as follows:

1 - Critical

- Over 70's
- Health conditions or disabilities making it difficult for customer to liaise with us by any other method

2 - Priority

- Digitally Vulnerable
- Other Vulnerability Identified such as
 - people with some mental incapacity that means it is easier to deal with them Face to Face.
 - people fleeing domestic violence if they do not feel safe talking over the telephone.
 - people with language difficulties.
 - people who have suffered a recent trauma (e.g., loss of a partner or close relative)

3 – Non-priority

- Any task that cannot be dealt with by other means (for example, a home visit may be required to validate some Council Tax discounts)

The service is primarily available to Council Tax Support claimants in Council Tax arrears. But is available to any customer where a vulnerability has been identified and support is needed to pay their Council Tax. For example, the

FirstSteps Team work closely with the Leaving Care Personal Advisors to support Care Leavers and customers adversely affected financially by COVID will also be supported.

Performance of the FirstSteps service in terms of customers supported and outcomes is reported monthly. Below demonstrates the number of customers supported through FirstSteps in December 2021.

Customer type	Number
Assist with CTS claim/CT discount	8
Customer contacted, awaiting response	34
Customer contacted, engaging	5
Debts settled	25
Deduction from benefits	8
EA cases held, pending further contact	17
Engaging with support worker/3 rd party	22
No longer engaging	61
Payment arrangement	150
Possible DRO/insolvency	9

We do get some enquiries regarding providing documents and when we do, if the customers are unable to use the online evidence upload or email facilities, we advise customers to either post the documents into us or post them through the Town Hall letterbox. Alternatively, we may arrange an appointment to assist.

We have worked with the Weston-super-Mare Library team to provide support and training to ensure that they can deal with simple enquiries.

1.6 Are there any gaps in our consultation, what are our plans for the future?

The service went live in July 2021, we have received feedback since implementation and changes put in place to improve the service. For example, we have worked with the Library service to ensure that simple enquiries can be dealt with immediately and queries are effectively signposted. We have also created a useful telephone list to give out to customers so that they can get through to the right team for their enquiry. We have worked with the Housing team to provide them with a booth to deal with any emergency appointments.

Section 4 – Assessment of Impact

Will the proposal have a disproportionate impact on any of these groups?

Insert X into one box per row, for impact level and type.

H = High, M = Medium, L = Low, N = None | + = Positive, = = Neutral, - = Negative

Impact Level

Impact type

Summary of Impact

	H	M	L	N	+	=	-	
Disabled people		X					X	It may be more difficult to access services via telephony and online. However, we will continue to meet the needs for reasonable adjustments to our services when they are requested or identified as being needed.
People from different ethnic groups			X				X	Potentially language issues over the telephone may impact ability to arrange appointment. We will continue to use an interpreter or have information provided in an alternative language to support customers whose first language is not English.
Men or women (including pregnant women or those on maternity leave)				X		X		
Lesbian, gay or bisexual people				X		X		
People on a low income			X				X	It may be that those on low income do not have access to telephony or have money to top up phones to make the call. We would make arrangements that a person presenting themselves at the Town Hall in these circumstances would be called back by the contact centre. We also suggest that the customer can use the telephone in

									reception to call services such as Council Tax and Housing.	
People in particular age groups				X					X	Older people may prefer a face-to-face service if they have been used to it. They may struggle to adapt. For this reason, we intend to maintain face to face appointments for those who really need them.
People in particular faith groups				X			X			
People who are married or in a civil partnership				X			X			
Transgender people				X			X			

Impact Level					Impact type			Summary of Impact
	H	M	L	N	+	=	-	
Other specific impacts, for example: carers, parents, impact on health and wellbeing, Armed Forces Community etc. Please specify:				X		X		

Does this proposal have any potential Human Rights implications?

Yes **No**

If 'yes', please describe

Could this proposal have a Cumulative Impact with any other budget savings?

Yes **No**

This is an impact that appears when you consider services or activities together; a change or activity in one area may create an additional impact somewhere else

If 'yes', please describe?

Section 5 – Action Plan

Where you have listed that there will potentially be negative outcomes, you are required to mitigate the impact of these. Please detail below the actions that you intend to take.

Action taken/to be taken	How will it be monitored?
1. Review impacts	Continued monitoring of feedback via the contact centres, concierge and visiting officers, and monitoring of equality issues.
2. Casual enquiries and digital assistance supported by Libraries	Feedback from the library service
3. Prompt appointment service for those that require Face to Face	Monitoring of time between booking and date of appointment. Maximum time is usually one week.
4. Prompt visiting office service for those that require it	As above
5. Telephone points in closed Gateways/ Libraries	Usage can now be monitored as a new phone system has been implemented. Waiting for a first report (volume and team)
6. Potential for video booths (zoom booths) in Libraries	Being considered as part of the future customer service strategy

7. Use of concierge and contact centres to assess need

Continuous feedback from both to ensure that needs are being met effectively

8. Customers who have an access need and require a reasonable adjustment will continue to have their access needs met through a range of methods of communication such as telephone and face to face appointments and the provision of accessible information where needed.

Continuous feedback/monitoring. Meetings arranged in order to ensure that we are meeting access needs.

9. Consideration should be given to mitigating the impact of the proposed focus on telephony services on the deaf community. This should be more explicit in the EIA. A Textphone and BSL relay service should be considered.

We will arrange a consultation session with the Deaf community to discuss ways in which we can improve our customer services that looks at website, town hall attendance and customer services more generally. To be take place in February 2022.

10. The lengthy GDPR statement at the start of the contact centre messaging will be reviewed to assess whether it can be reduced as this is seen as a potential barrier.

Switchboard – it takes 24 seconds to get through to select the option required, e.g., waste. Other messages within the IVR take approximately 30 seconds so the call will be ringing for an agent within one minute. All interactive voice response systems will be reviewed to ensure that the messages are shorter and to reduce repetition around the online offer.

11. Promotion of the other method of communication should be considered, such as web chat and eforms (email).

Eforms are available on the website and promoted on the contact us page amongst others. Web chat is

12. Put in place a training plan for contact centre staff around people with learning disabilities so that they

are aware of the importance of listening for clues and being knowledgeable about the best way to engage.

13. Equality stakeholders offered their support to discuss any access or equality issues encountered through the transformation of this service. Service lead will attend.

being upgraded and will be live in Jan 2022. The contact us page will be reviewed and ensure that we include details of all support, eg. Web chat and Relay UK.

Review training plans.

Confirmation of attendance.

If negative impacts remain, please provide an explanation below.

As listed in the action plan above.