



Equality Impact Assessments

2023/24 Medium Term Financial Plan

Corporate Services – January 2023

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1. The Proposal

Directorate:	Corporate Services
Service area:	Senior Management
Budget reference:	CSD1
Budget reduction proposal:	Reduce senior management within the directorate, along with external resources previously used to support transformation
Budget saving for this financial year:	£159,000

Description of the proposal:

This saving will remove a vacant post (Assistant Director, Transformation) from the directorate leadership structure and remove base budget to support transformation activities.

Summary of changes:

Following the retirement of the post holder, the Assistant Director role and accompanying budgets to support transformation have been held vacant for the remainder of 2022/23 and utilised for the Accommodation Strategy, which is one of the council's key change programmes. Removing these budgets from the base budget will have an ongoing impact on the strategic capacity of the directorate and the ability to effect change. In the future, transformation activity will be taken forward on an "invest to save" basis, using one off resource when available. These changes have no direct impact on residents or service users.

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

If yes, please describe what steps you have taken to review the equality impacts from previous years?

N/A

2. Customer equality impact summary

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

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			
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, armed forces community, 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. Please describe both positive and negative impacts.

It is not anticipated that there will be any customer impact because of this budget proposal.

Please describe how you will communicate these changes to your customers

N/A – internal customers engaged through budget setting process

4. Staff equality impact summary

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

Explanation of staff impact

The vacant Assistant Director (Transformation) post will be deleted via this proposal

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
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: Amy Webb
Date: 25th November 2022

1. The Proposal

Directorate:	Corporate Services
Service area:	Corporate Contracts
Budget reference:	CSD2
Budget reduction proposal:	Review the scope and scale of support provided to the council through external contractual arrangements in respect of Internal Audit and Archiving, i.e., the storing of historic artefacts
Budget saving for this financial year:	£10,000

Description of the proposal:

This saving will review the scope of internal audit and archiving services provided to the council; it will consider the opportunities for efficiencies in terms of approach taken to deliver the service.

Summary of changes:

Seeking efficiencies in the way that contracts operate, including review of levels of activity and scope of contracts. These changes are yet to be defined but a review of scope has been initiated. The changes are unlikely to have a direct impact on communities.

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

If yes, please describe what steps you have taken to review the equality impacts from previous years?

N/A

2. Customer equality impact summary

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

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			
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, armed forces community, 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. Please describe both positive and negative impacts.

It is not anticipated that there will be any negative impact on customers because of this proposal.

Please describe how you will communicate these changes to your customers

N/A – internal customers engaged through budget setting process

4. Staff equality impact summary

Are there any staffing implications for this proposal? Yes No

Explanation of staff impact

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
	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:

Amy Webb

Date:

29th November 2022

1. The Proposal

Directorate:	Corporate Services
Service area:	Business Insight, Policy and Partnerships
Budget reference:	CSD3
Budget reduction proposal:	Review the scope and scale of the Business Intelligence and Policy & Partnerships teams and the delivery of consultation and research activity
Budget saving for this financial year:	£80,000

Description of the proposal:

Review the scope and scale of the Business Intelligence and Policy & Partnerships teams and provide a saving of £100,000 to be delivered across 2023/24 (£80,000) and 2024/25 (£20,000).

The Business Insight, Policy and Partnerships Service includes the council's centralised Business Intelligence Service and the corporate Policy and Partnerships team. The Business Intelligence Service is a one-council service which undertakes data collection, data analysis, data visualisation, performance reporting and Geographical Information Systems support across the council. The majority of the work undertaken is either a statutory requirement e.g., government returns, or is in support of statutory duties e.g., data and performance reports for front line teams. The Policy and Partnerships team is responsible for the delivery of the Empowering Communities transformation programme, strategic partnerships such as the North Somerset Partnership, and Town and Parish council support and engagement.

Savings will be made across the teams by a reduction in staffing full time equivalents (FTE). This reduction will be achieved by reviewing all work to further embed self-serve models for data and performance reports, cease all non-statutory returns, and reduce all non-statutory development work. Transformation activity will be rationalised following a review of all strategy action plans.

Summary of changes:

Review the scope and scale of the Business Intelligence and Policy & Partnerships teams and provide a saving of £100,000 to be delivered in 2023/24 (£80,000) and 2024/25 (£20,000).

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

If yes, please describe what steps you have taken to review the equality impacts from previous years?

N/A

2. Customer equality impact summary

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

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, armed forces community, impact on health and wellbeing.	X			X

3. Explanation of customer impact

Please describe the reasons for the impact level in the table above. Please describe both positive and negative impacts.

The impact on customers because of this proposal will be low but there will be some impacts internally for services and for partners.

Please describe how you will communicate these changes to your customers

There will be a low impact for customers (residents) but some impacts internally for services and for partners. Impacts for services and partners will be communicated via refreshed Service Level Agreements where appropriate or refreshed strategy action plans.

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.

5.6 FTE roles in the BIPP service are temporary roles which will cease from April 2023 onwards. These are not part of the £100,000 budget saving identified within this proposal. In addition to the removal of those temporary roles, an additional 2 FTE roles will need be removed from the staffing structure. This reduction in capacity will impact on delivery of all non-legal, non-statutory or non-statutory support services.

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
Total	

6. Review and Sign Off

Service Manager Review

Is a further detailed equality impact assessment needed? Yes No

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

Service Manager:

Emma Diakou

Date:

28th November 2022

1. The Proposal

Directorate:	Corporate Services
Service area:	Strategic Procurement Service
Budget reference:	CSD5
Budget reduction proposal:	Review and reduce resources required to deliver Procurement services, reflecting reduced demand as a result of lower overall external spend
Budget saving for this financial year:	£54,000

Description of the proposal:

£24,000 to be saved by reviewing the current Head of Procurement post and sharing with BANES. A further £30,000 saving to be secured through restructuring the Procurement Team and/or identifying alternative funding sources.

Summary of changes:

There is one vacant post within the team, this post is currently the substantive post for an individual who is seconded to a fixed term post that expires in April 23.

Discussions are currently ongoing about continuing funding for the fixed term post which would enable the vacant post to be released to fund the saving. Should this not be possible then we would need to reduce one of the other posts within the team by 22 hours to fund the saving. This will result in the team being able to provide a reduced service.

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

If yes, please describe what steps you have taken to review the equality impacts from previous years?

N/A

2. Customer equality impact summary

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

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			
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, armed forces community, 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. Please describe both positive and negative impacts.

Although changes to the way that we support projects will change, this is not anticipated to have any external impact on the councils' customers.

Please describe how you will communicate these changes to your customers.

Not needed as no external impact.

4. Staff equality impact summary

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

Explanation of staff impact

There is one vacant post within the team, this post is currently the substantive post for an individual who is seconded to a fixed term post that expires in April 23.

Discussions are currently ongoing about continuing funding for the fixed term post which would enable the vacant post to be released to fund the saving. Should this not be possible then we would need to reduce one of the other posts within the team by 22 hours in order to fund the saving. This will require a consultation with support from HR to identify the posts and individuals that are potentially affected.

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
N/A	
Total	

6. Review and Sign Off

Service Manager Review

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

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

Service Manager: Mark Roddan

Date: 1st December 2022

1. The Proposal

Directorate:	Corporate Services
Service area:	Communications
Budget reference:	CSD6
Budget reduction proposal:	Review of the Comms Team and release capacity from vacant post
Budget saving for this financial year:	£35,000

Description of the proposal:

The saving will be achieved by not filling a vacant post.

Summary of changes:

While the review will aim to achieve better alignment to corporate goals through team structure, there will no change to the amount of resource within the team.

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

If yes, please describe what steps you have taken to review the equality impacts from previous years?

N/A

2. Customer equality impact summary

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

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			
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, armed forces community, impact on health and wellbeing.				X			

3. Explanation of customer impact

Please describe the reasons for the impact level in the table above. Please describe both positive and negative impacts.

Given that we have never filled the post that is now being deleted there will be no immediate customer impact. However, the team's ability to deliver all its objectives

will be limited, potentially leading to less effective communications with the residents of North Somerset. We will continue to deliver on our commitments to support equality groups.

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

Impact is pressure on team through not filling post, this will be monitored regularly through team meetings and one to one discussions.

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
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: Vanessa Andrews
Date: 29th November 2022

Medium Term Financial Plan Equality Impact Assessment 2023/24

Service area:	Marketing and Communications
Budget reference:	CSD7
Budget reduction proposal:	Reduce the number of editions of North Somerset Life from 3 to 2 per year. Also look to increase income opportunities
Equality impact assessment owner:	Vanessa Andrews
Assistant Director/Director sign off:	Amy Webb
Review date:	June 2023

Budget Ref.	Budget Reduction Proposal	Budget Reduction £			Staffing Reduction (FTE) 2023/24
		2023/24	2024/25	2025/26	
CSD7	Reduce printed edition of Life magazine from three to two per year, and increase income opportunities	£39,000			0

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

1. The Proposal

1.1 Background to proposal

Life magazine is delivered to about 104,000 households across North Somerset so continues to be one of our important channels of communication. However, paper and distribution costs are rising rapidly so each edition is costing more and more to produce. Reducing to two issues a year would help mitigate this and save the council money.

This could mean that our customers have less access to council news. However, we will continue to grow and develop our digital e-newsletter version and other communications channels. The digital newsletter currently goes out to about 75,000 email addresses monthly and regularly has an open rate of about 45 per cent. We will continue to gather email addresses where possible to increase this digital growth, as well as developing the North Somerset Life web microsite.

1.2 Please detail below how this proposal may impact on any other organisations and their customers

Within the magazine we often run articles/adverts promoting different organisations and charities throughout North Somerset, and the services they provide. There would be less opportunity for these to appear if we only have two issues. However, these articles could go within the digital Life newsletter instead.

Section 2 – What Do We Know?

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

Throughout the years we have asked questions about readership via the Citizen's Panel, and previously through Place Surveys and the BVPI General Survey.

Data from the most recent survey (autumn 2021 Citizens Panel) tells us that printed Life has a regular readership of 56 per cent of adults (reading every issue) and 87 per cent reading it at least once a year. Only 14 per cent are lapsed readers or never read it. There is a 'Life effect', whereby readers have clearly felt better informed about council activity than non-readers.

In the same survey we asked residents for their view on the frequency of

publication at three times a year. 64 per cent said this was just right, 24 per cent said it wasn't often enough and 12 per cent said this was too often.

When asked about the usefulness of a series of named sources, NS Life magazine ranked third highest with 80 per cent of respondents saying they found it very or fairly useful.

However, when asked how they'd like to get updates about public life in North Somerset 34 per cent stated a regular email newsletter while 18 per cent said a regular free magazine to the door.

We currently produce large print and audio editions of the magazine for visually impaired people. The audio editions are also available through a talking news service via Alexa devices. By reducing to two issues, visually impaired residents will have less regular news/information about council services in these formats.

We also expect there to be a medium negative impact for people on lower incomes, who might have restricted digital access and therefore prefer a printed copy through the door and will potentially have less access to our alternative sources of information.

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

The autumn 2021 Citizens' Panel data referenced at 2.1 above also tells us the following about the magazine:

People aged 65 and over were most likely to say the frequency was just right (68 per cent of respondents).

Disabled people (34 per cent) were more likely to say the frequency wasn't often enough.

People aged 65 and over also told us that their preferred method for council news was a regular email newsletter (45 per cent).

Disabled people told us that they preferred an 'as-it-happens email-update to your phone, tablet/iPad, computer or similar' (50 per cent).

So, while we know the magazine is popular and read by older and disabled people, we also know they have an appetite for digital news.

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

The data from the panel does not give us information about council information preferences for people whose ethnicity is described as non-white. However, we have had a conversation with a representative from the North

Somerset Race Equality Network and offered to meet with them during the year ahead (before frequency reduces) to explore routes to better meet the council news requirements for people from different ethnic groups.

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

We have conducted research through the Citizens' Panel – as shown above.

This proposal was shared with the Equality Stakeholder Group on 12 January 2023, they made the following, helpful comments:

Comment	Response
<p>When consulting on communication matters the Citizen's Panel is not the most effective as by its nature it is made up of people who are happy to engage with the council online.</p>	<p>The council comms team has offered to meet representatives from equalities groups in the coming year to explore together opportunities to improve communications methods.</p> <p>Work continues to ensure our Citizens Panel and other sources of consultation are as inclusive as possible.</p>
<p>The Council should consider the cumulative impact of this alongside changes such as a reduced number of face-to-face appointments and the ability to 'drop in' to Council gateways. This will have a particular impact on disabled people, those from BAME groups and older people.</p>	<p>In discussion with the consultative group, we agreed that the council services featured in council news should be able to provide more support and print information out and post it to those who are unable to access information digitally.</p> <p>We recognise that digital cannot meet every need. However, promoting digital services allows us to use our limited resources to support our most vulnerable or digitally excluded customers through other channels such as telephony and face-to-face.</p> <p>We understand that we have a duty to provide reasonable adjustments for those who can't. We also acknowledge that we need to make sure that our digital services are good enough and provide enough</p>

	<p>information so that customers don't have to contact us another way to follow up. We continue to offer contact centres for customers to contact us by phone, face to face appointments at the Town Hall and a range of drop-in services are being piloted across North Somerset.</p>
<p>The EIA should consider the impact on those who are on a low income and who may not have access to data to seek council information online.</p>	<p>In consultation with the equalities group we agreed that we would make information available in libraries to signpost to 'eLife' – e.g. website on the home screen of the public access computers so people can keep up to date when they go online at libraries (free access to internet)</p>
<p>The EIA includes a lack of information/knowledge about how North Somerset's ethnically diverse population are accessing council information.</p> <p>Consider how you will grow the readership of eLife amongst equality groups.</p>	<p>Marketing and Communications Team to link with equality groups to try and understand the impact/actions in more detail.</p>
<p>Make it explicit within the EIA that alternative formats of Life will continue to be provided.</p> <p>Make sure that eLife always has an alternative way to contact the council for more information, for example by signposting people to the council's switchboard so they can contact key services.</p>	<p>Noted.</p> <p>We agreed that in both printed Life and eLife we will signpost to how people can contact the council (switchboard) if they would like help to access additional info about any of the subjects covered.</p>
<p>Consider how we can use council spaces including libraries to raise awareness of the information shared in eLife</p>	<p>We will include this as a mitigation within the EIA and review the best way to do this.</p>

Consider venues where North Somerset Life could be distributed, for example in community living rooms, The Other Place, The Advice Shop etc.	We have already begun to compile a list of potential venues and will contact them to see if they would like to receive paper copies.
The size of the font in digital comms needs to be reviewed to ensure it is accessible to a wider audience	We will review this as there may be a simple way of adding an option to enable the site user to adjust the font size to suit their needs, or to increase the size for all.

2.5 What has this told us?

Please see above, actions have been included within our mitigation plans below.

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

Through implementation, we will develop the magazine to tailor more of the content towards groups who may be adversely affected by the reduction in frequency. We will use readership data obtained through the North Somerset Citizens' Panel to inform our thinking.

We still plan to issue three editions in 2023 so any negative impact will be deferred until 2024. We can achieve this as follows:

March 2023 edition - funded from 2022/23 budget

July 2023 edition - funded from 2023/24 budget

December 2023 edition - funded from 2023/24 budget.

This gives us a calendar year to develop our digital channels further and ensure relevant content remains in the paper versions of NS Life.

We will keep developing the e-newsletter, so people can get updates straight to their email inbox, outlining the latest news and information about our services,

We also aim to develop the Life microsite with more features and news, giving us more opportunity to put up-to-date content on there.

Section 3 – Assessment of Impact

Will the proposal have a disproportionate impact on any of these groups? Please describe the nature of the impact in 'Summary of Impact' column. You should describe both negative and positive impacts.

Assessment of impact should include the consideration of Public Sector Equality Duties as listed in [section 149 of The Equality Act 2010](#), specifically:

A public authority must, in the exercise of its functions, have due regard to the need to—

- eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under this Act;
- advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it;
- foster good relations between persons who share a relevant protected characteristic and persons who do not share it.

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 (including consideration of neurodiversity)		x					x	Less frequent access to council news in printed format through the door, large print and podcast
People from different ethnic groups			x				x	
Men or women (including pregnant women or those on maternity leave)				x				
Lesbian, gay or bisexual people				x				
People on a low income		x					x	Less frequent access to council news in printed format through the door
People in particular age groups		x					x	Less frequent access to council news in printed format through the door
People in particular faith groups				x				
People who are married or in a civil partnership				x				
Transgender people				x				

Impact Level	Impact Type			Summary of Impact				
	H	M	L		N	+	=	-
Other specific impacts, for example: carers, parents, Armed Forces Community, impact on health and wellbeing.				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 service areas?

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?

Services across the organisation rely on the magazine to enable them to reach residents for many reasons, e.g.

- to promote behaviour change (e.g. recycle more, healthy behaviours)
- to help provide services (e.g. become a foster carer, become a shared lives carer, volunteering)
- to promote carbon reduction (e.g. home adaptations, travel habits)
- to promote service changes (e.g. festive recycling dates).

With fewer editions a year we will have less opportunity across the council to reach every resident with these important messages.

The Equality Stakeholder Group also commented on the potential cumulative impact of changes to the way customers can access a range of information and services.

We recognise that digital cannot meet every need. However, promoting digital services allows us to use our limited resources to support our most vulnerable or digitally excluded customers through other channels such as telephony and face-to-face.

We understand that we have a duty to provide reasonable adjustments for those who can't. We also acknowledge that we need to make sure that our digital services are good enough and provide enough information so that customers don't have to contact us another way to follow up. We continue to offer contact centres for customers to contact us by phone, face to face appointments at the Town Hall and a range of drop-in services are being piloted across North Somerset.

Section 4 – 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?
We will develop the magazine to tailor more of the content towards groups who we expect to be adversely affected by the reduction in frequency. We will use readership data obtained through the North Somerset Citizens' Panel to inform our thinking.	Content in the magazine
We will arrange to meet with representatives from equalities groups during 2023 to develop more opportunities to communicate effectively.	Feedback to the council from equalities groups
We will lessen the impact of barriers to digital news by making paper copies available in other venues and by signposting to eLife in our libraries.	Comms team to confirm annually through visual / phone / email checks.

If negative impacts remain after the above actions have been taken, please provide an explanation below.

We expect the impact to be low after mitigating actions.

Please set out how you plan to communicate these changes with your service users.

Through the magazine.

Medium Term Financial Plan

Initial Equality Impact Assessment 2023/24



1. The Proposal

Directorate:	Corporate Services
Service area:	People Services
Budget reference:	CSD 8
Budget reduction proposal:	Realign occupational health and annual leave buy back budgets to current levels
Budget saving for this financial year:	£13,000

Description of the proposal:

This proposal is made up of savings in two areas:

- The re-alignment of the Occupational Health budget to reflect current usage levels. (£3,000 saving)
- An increase in savings generated by the staff purchase of additional annual leave (£10,000)

Summary of changes:

Occupational Health - The occupational health (OH) budget pays for pre-employment fitness checks, occupational health assessments (by nurse and OH Dr), ill health advice (for pension requirements), flu clinics and our Employee Assistance Programme.

No plans are made to reduce any of these services. The budget reduction is manageable within these arrangements. Additionally, we had monies in reserves to help with any medical advice/interventions we may have needed during and post Covid. These monies have been fully released as they were not needed. It is therefore anticipated that the same levels of service can continue within a reduced budget.

Purchase of additional annual leave - The annual leave purchase scheme will remain unchanged. All staff have the option to purchase one- or two-weeks additional leave per year, in two windows. This arrangement will continue unchanged.

Managers have the option to decline the request, however they will be encouraged to approve unless there is significant impact on service delivery. HR will continue to monitor and encourage take-up of the scheme

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

If yes, please describe what steps you have taken to review the equality impacts from previous years?

N/A

2. Customer equality impact summary

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

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			
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, armed forces community, impact on health and wellbeing.	X			

3. Explanation of customer impact

Please describe the reasons for the impact level in the table above. Please describe both positive and negative impacts.

It is not anticipated that there will be any impact on our customers as a result of this proposal. In respect of annual leave buy back scheme: requests that will have a detrimental effect on service delivery will not be approved.

Please describe how you will communicate these changes to your customers

Not needed.

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.

Purchase of additional annual leave - All staff have the option to request to purchase annual leave. Take up is monitored however the scheme has not been in operation long enough to determine any impact on particular staff groups, however initial analysis has not suggested any negative impact. Take up of the scheme has been highest in the Adult Services Directorate. A full report of the Annual Leave Purchase Scheme has been undertaken recently.

Take up from the 2022 scheme shows similar numbers between full time and part time staff.

Directorate	Headcount	Purchase	%	P/T	F/T	P/T	F/T
-------------	-----------	----------	---	-----	-----	-----	-----

				1wk	1wk	2wk	2wk
Adult's Services	374	10	3	4	2	2	2
Children's Services	504	6	1	2	4	0	0
Place	598	6	1	3	2	0	1
Public Health & Regs	101	3	3	1	1	0	1
Corporate Services	213	6	3	2	4	0	0
Totals	1790	31	2	12	13	2	4

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
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:

Su Turner

Date:

25th October 2022

Medium Term Financial Plan Initial Equality Impact Assessment 2023/24



1. The Proposal

Directorate:	Corporate Services
Service area:	Legal & Democratic Services
Budget reference:	CSD9
Budget reduction proposal:	Review the resources required to deliver a range of internal support services including the senior leadership support team, legal, democratic and scrutiny services as well as electoral and registration services and look to reduce costs and / or increase income.
Budget saving for this financial year:	£21,000

Description of the proposal:

Review the resources required to deliver a range of internal support services including the senior leadership support team, legal, democratic and scrutiny services as well as electoral and registration services and look to reduce costs and / or increase income.

Summary of changes:

Following retirement of one of the post holders (job-share split) of the Chief Executive Secretary & Team Leader post the team structure has been reviewed and a revised structure implemented, allowing release of part of a post (vacant).

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

If yes, please describe what steps you have taken to review the equality impacts from previous years?

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			
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, armed forces community, 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. Please describe both positive and negative impacts.

Change will not impact customers – service to be delivered to maintain services levels as previously

Please describe how you will communicate these changes to your customers

Main customers are internal staff in the Senior Leadership Team, and they have been consulted and advised.

4. Staff equality impact summary

Are there any staffing implications for this proposal? 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.

Post of retired post holder deleted from establishment. Impact on team to be monitored through team meetings and in one-to-one discussions.

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

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

6. Review and Sign Off

Service Manager Review

Insert any service manager comments here:

Change already implemented and in-year savings contributing to 2022/23 budget position

Is a further detailed equality impact assessment needed?

Yes **No**

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

N/A

Service Manager:

Nicholas Brain

Date:

21st November 2022

Medium Term Financial Plan Initial Equality Impact Assessment 2023/24



1. The Proposal

Directorate:	Corporate Services
Service area:	Support Services
Budget reference:	CSD10
Budget reduction proposal:	Review and reduce the resources required to deliver a range of internal support services such as ICT support and project management and external contract costs for bought in services. Seek further income from trading opportunities and project management activity.
Budget saving for this financial year:	£120,000

Description of the proposal:

The proposal adjusts the team structure and provides budget reductions for digital development and other small budget reductions.

Summary of changes:

The proposal removes the vacant ICT Asset Officer post from the structure with elements of the key functions being allocated to other members of the Service. Shift the basis for one Project Management post to being 100% reliant on income generation (please note: income generation will be delivered across the three project posts). Reduces the existing digital development budget (one development cycle from eight delivered each year) and other small budget reductions.

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

If yes, please describe what steps you have taken to review the equality impacts from previous years?

n/a

2. Customer equality impact summary

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

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			
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, armed forces community, impact on health and wellbeing. Please specify:							



3. Explanation of customer impact

Please describe the reasons for the impact level in the table above. Please describe both positive and negative impacts.

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

Please describe how you will communicate these changes to your customers

Internal customers of the ICT Projects service will be made aware via Directorate Engagement Boards that council resources will be used alongside Agilisys resources and will reduce the project costs.

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.

Three project posts within the Service will be required to trade their services to support the recording of time and recharging of costs linked to the projects supported by the team. It is intended that resources will be allocated and recharged to major transformation projects as delivered during the year.

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
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Total

6. Review and Sign Off

Service Manager Review

Insert any service manager comments here:

While the scope of digital development activity will be reduced by 12.5%, prioritisation and activity will continue to focus on the development of the council's website with consideration given to how changes will impact customers based on each development.

Is a further detailed equality impact assessment needed?

Yes **No**

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

n/a

Service Manager:

Stuart Anstead

Date:

29th November 2022

Medium Term Financial Plan Initial Equality Impact Assessment 2023/24



1. The Proposal

Directorate:	Corporate Services
Service area:	Support Services
Budget reference:	CSD11
Budget reduction proposal:	Reduce printing costs and equipment leases, reduce physical document storage costs
Budget saving for this financial year:	£10,000

Description of the proposal:

Reduction in printing costs because of staff printing less.

Summary of changes:

Reduction in physical printing costs associated with the corporate Multi-Functional Device (MFDs) estate by reducing overall demand and the removal of physical devices (MFDs).

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

If yes, please describe what steps you have taken to review the equality impacts from previous years?

n/a

2. Customer equality impact summary

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

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				
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, armed forces community, impact on health and wellbeing. Please specify:								

3. Explanation of customer impact

Please describe the reasons for the impact level in the table above. Please describe both positive and negative impacts.

The 'new ways of working' project which is derived from the Accommodation Strategy will reduce the occupied office space and establish new hybrid working arrangements. Therefore, staff are now printing lower volumes of hard copy documents as they become accustomed to working digitally. This proposal will not have an impact on our duty to print accessible formats for staff and customers.

Please describe how you will communicate these changes to your customers

The Accommodation Project will include change management resources to communicate the new office environment and expected operating model.

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
Total	

6. Review and Sign Off

Service Manager Review

Insert any service manager comments here:

This change is formalising the reduction in printing demand since the workforce has been working remotely due to Covid.

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

Service Manager:

Stuart Anstead

Date:

29th November 2022

Medium Term Financial Plan Initial Equality Impact Assessment 2023/24



1. The Proposal

Directorate:	Corporate Services
Service area:	Support Services
Budget reference:	CSD13
Budget reduction proposal:	Increase income from Carelink users – aligned to inflation
Budget saving for this financial year:	£10,000

Description of the proposal:

Increase Carelink costs by 1.75% above the normal level of indexation to cover increased costs.

Summary of changes:

Increase the service cost by 1.75% above the normal annual increase which is linked to the NJC pay award and Retail Price Index to create additional growth in income. The current full weekly charge is £5.48 or £285.74 annually, customers in receipt of pension credits pay a subscription which is 50% of the full-service cost, therefore the annual costs are £143.87.

The likely total indexation including the additional 1.75% (the subject of this EIA) is forecast to be 10.1%. for 2023/24. Hence, the total annual increase in costs are estimated at £28.86 for the full service or £14.43 for the half price service. Included in these values are the increases which are directly linked to this increase in CareLink cost by 1.75% which equate to £5.00 or £2.50 for the half price service.

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

If yes, please describe what steps you have taken to review the equality impacts from previous years?

n/a

2. Customer equality impact summary

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

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			
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				X
People in particular age groups			X				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, armed forces community, impact on health and wellbeing. Please specify:							

3. Explanation of customer impact

Please describe the reasons for the impact level in the table above. Please describe both positive and negative impacts.

Customers will be required to pay an elevated cost for the CareLink service which will have an impact on customers, specifically those with a low income. Currently the estimate is an increase of 10.1% on the existing service cost. The scheme already has a discounted tariff/subsidised rate for customers in receipt of benefits, this will continue but there will be a modest increase in the cost of the service.

The service currently generates income of over £500,000 per annum.

By 2024 the service will be required to migrate completely to digital devices which whilst providing enhanced services to customers, will have higher delivery costs.

Please describe how you will communicate these changes to your customers

The increased fees will be published in the council's annual fees and charges booklet and notifications will be sent to all existing 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.

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

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

n/a

Service Manager:

Stuart Anstead

Date:

29th November 2022

Medium Term Financial Plan Initial Equality Impact Assessment 2023/24

1. The Proposal

Directorate:	Corporate Services
Service area:	Support Services
Budget reference:	CSD14
Budget reduction proposal:	Implement a range of changes and cuts to the Support Services Contract through reductions to the scope and scale of services and capacity available to the council. Areas of change include Facilities, Digital Support, Cash Collection, Revenues and Benefits, Accounts Payable, Carelink and ICT
Budget saving for this financial year:	£133,000

Description of the proposal:

Reduction in Agilisys contract costs linked to service efficiencies.

Summary of changes:

Reduction in Agilisys contract costs to align the contract with changes in demand and non-essential services:

- **Facilities Management** will provide a saving linked to the reduced occupation of Castlewood and the associated cleaning costs.
- Lower **cash collection** costs are linked with the implementation of the Cashless council initiative, which will see a reduction in the volumes of scheduled collections from parking machines.
- The **Benefits service** will experience a continued reduction in caseload volumes linked to the migration of working-age benefits cases to the DWP and Universal Credit.
- Efficiencies in **Accounts Payable** service will enable a reduction in contract costs.
- The new case management system for **CareLink** will provide efficiency savings via a reduction in the contract price.
- A small reduction in the revenue budget for the provision of the **Welfare Support** scheme will be offset by an increased level of external welfare

funds, such as the Household Support Fund which will provide an estimated £2.6m for local residents in 2023/24.

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

If yes, please describe what steps you have taken to review the equality impacts from previous years?
 n/a

2. Customer equality impact summary

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

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			
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				X
People in particular age groups			X				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, armed forces community, impact on health and wellbeing. Please specify:				

3. Explanation of customer impact

Please describe the reasons for the impact level in the table above. Please describe both positive and negative impacts.

Savings will be achieved via service efficiencies, reduced demand or the provision of a new external service or funding. For example, Universal Credit will be administered by the DWP & the Welfare Provision Scheme will see an increase in available funds from external sources to support vulnerable residents.

Please describe how you will communicate these changes to your customers

Benefits customers who transition across to Universal Credit will be notified and engaged as part of the benefits process. Other service changes will not impact customers directly.

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
Total	

6. Review and Sign Off

Service Manager Review

Insert any service manager comments here:

Most of the changes will not impact customers directly because demand has changed.

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

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

n/a

Service Manager:

Stuart Anstead

Date:

29th November 2022

Medium Term Financial Plan Initial Equality Impact Assessment 2023/24



1. The Proposal

Directorate:	Corporate Services Directorate
Service area:	Finance Service
Budget reference:	CSD17
Budget reduction proposal:	Undertake a review of the Finance Service to evaluate core areas of responsibility, reduce the scope and scale of services currently provided and efficiencies.
Budget saving for this financial year:	£103,000

Description of the proposal:

Implement a series of proposals that ensures that the Finance Service can reduce its net cost by up to 10%.

Summary of changes:

It will be necessary to undertake a complete review of the Finance Service to evaluate core areas of responsibility and its current cost base to make a series of recommendations which reduce the net budget by approximately 10%.

This process will therefore assess the resources used to deliver the service, i.e. review of internal staffing, external contract support and also system type costs, linking them to deliverable outputs and functions used by services across the organisation as well as by other stakeholders.

Recommendations will aim to ensure that back-office processes such as system generated downloads, reports and working papers are as efficient as possible and that the introduction of new systems will unlock future savings, although it should be recognised that cost reductions of up to 10% cannot be delivered purely through efficiencies and so there will need to be reductions in both the scope and scale of Finance related services available to the council.

Given that this proposal will result in lower levels of capacity it does mean that services and functions will need to be prioritised and focus will be given to statutory functions and priority areas of the council. The review will also

ensure the remaining services are deliverable within reduced capacity levels and that any revisions are clearly shared and communicated to both staff and service users.

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

If yes, please describe what steps you have taken to review the equality impacts from previous years?

n/a

2. Customer equality impact summary

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

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			
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, armed forces community, 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. Please describe both positive and negative impacts.

It is not anticipated that this proposal will have a notable impact on our customers.

- Internal customers – may not receive the same levels of services as now
- External customers – similarly may not receive the same levels of service as now or within similar timescales

Please describe how you will communicate these changes to your customers

There is no need to communicate externally, internally customers will be notified of any change in service levels so they can plan accordingly.

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.

Until the review has been completed it is not possible to confirm the outcome or describe the impact in detail however an initial assessment has been made which shows there are currently 45.01 budgeted fte within the Finance Service.

Staff consultation is underway in accordance with the council's HR processes and customers will be advised of the revised service offer.

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
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?	n/a	

Service Manager: Melanie Watts

Date: 24th January 2024

Medium Term Financial Plan Initial Equality Impact Assessment 2023/24

1. The Proposal

Directorate:	Corporate Services Directorate
Service area:	Office Accommodation
Budget reference:	CSD19
Budget reduction proposal:	Align income budget from tenants to current levels at Castlewood and reduce premises related costs within office accommodation sites by 10% e.g., paper supplies, maintenance etc
Budget saving for this financial year:	£235,000

Description of the proposal:

To reduce the expenditure budgets associated with the council's operational office buildings and to realign the income budgets current levels

Summary of changes:

Review of existing costs and reduction in current provision to align to core service offer. Ensure that income is received from current tenancy arrangements.

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 S7 – reduction in building costs

If yes, please describe what steps you have taken to review the equality impacts from previous years?

There are no specific equality impacts assessed for specific users or groups.

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			
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, armed forces community, 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. Please describe both positive and negative impacts.

There should be no impact on customers either internally or externally.

Please describe how you will communicate these changes to your customers

Users of the building should not experience any significant changes; all health and safety and accessibility measures will be retained.

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 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
	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:

13th November 2022

Medium Term Financial Plan Initial Equality Impact Assessment 2023/24



1. The Proposal

Directorate:	Corporate Services Directorate
Service area:	Commercial Investments
Budget reference:	CSD20
Budget reduction proposal:	Reduce budgets associated with the Sovereign Centre including the removal of resources set-aside to fund the capital financing costs of potential future investment and contract management costs
Budget saving for this financial year:	£290,000

Description of the proposal:

Reduce budgets associated with the council's commercial investment portfolio including the external management and support contract costs for both sites as well as specific provision currently included within the base in respect of the Sovereign Centre. This sum was initially set aside to fund the capital financing costs of potential future investment in the site, whereas new investment will be required to satisfy a business case demonstrating a cash-able pay-back which would be sufficient to cover such costs.

Summary of changes:

The council will be required to scope the revised requirements which are to be delivered by asset managers who currently provide strategic oversight and direction of these assets on behalf of the council.

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

If yes, please describe what steps you have taken to review the equality impacts from previous years?

n/a

2. Customer equality impact summary

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

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				
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, armed forces community, 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. Please describe both positive and negative impacts.

There should be no impact on customers either internally or externally.

Please describe how you will communicate these changes to your customers

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.

There should be no impact on staffing.

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

<u>Service area</u>	<u>Value of saving</u>
	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: 13th November 2022

Medium Term Financial Plan

Initial Equality Impact Assessment 2023/24



1. The Proposal

Directorate:	Corporate Services Directorate
Service area:	Corporate Finance
Budget reference:	CSD21 and CSD22
Budget reduction proposal:	CSD21 – Increase income from external investment activity largely as a result of higher interest rates CSD22 – Reduction in debt costs and charges (Avon Loan Debt and Revolving Infrastructure Fund)
Budget saving for this financial year:	£910,000

Description of the proposal:

The council will seek to achieve a net reduction in the amount it pays for its capital financing costs and 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 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 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 S8 and CSD S9

If yes, please describe what steps you have taken to review the equality impacts from previous years?

There are no specific equality impacts assessed for specific users or groups.

2. Customer equality impact summary

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

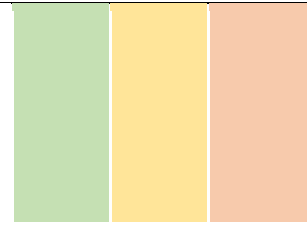
H = High, M = Medium, L = Low, N = None

+ = Positive, = = Neutral, - = Negative

Impact Level	Impact type						
	H	M	L	N	+	=	-
Disabled people (Including consideration of neurodiversity)				X			
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, armed				X			

forces community, impact on health and wellbeing.

Please specify:



3. Explanation of customer impact

Please describe the reasons for the impact level in the table above. Please describe both positive and negative impacts.

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
	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:

24th January 2024

Medium Term Financial Plan Initial Equality Impact Assessment 2023/24



1. The Proposal

Directorate:	Corporate Services Directorate
Service area:	Corporate Finance
Budget reference:	CSD23
Budget reduction proposal:	Reduction in former employee pension costs
Budget saving for this financial year:	£30,000

Description of the proposal:

To reduce the expenditure budgets associated with Former Employees.

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.

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 S6 2022/23 Reduction in pension costs

If yes, please describe what steps you have taken to review the equality impacts from previous years?

There are no specific equality impacts assessed for specific users or groups.

2. Customer equality impact summary

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

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					
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, armed forces community, 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. Please describe both positive and negative impacts.

There are no specific equality impacts assessed for specific users or groups.

Please describe how you will communicate these changes to your customers

There are no specific equality impacts assessed for specific users or groups.

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
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:

13th November 2022

1. The Proposal

Directorate:	Corporate Services Directorate
Service area:	Cross cutting
Budget reference:	CSD24
Budget reduction proposal:	Annual uplift to fees and charges to cover inflationary cost of services - Corporate
Budget saving for this financial year:	£36,000

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 2023 to reflect the council's financial policy of annually inflating charges to cover the increased costs for goods and services. This specific savings proposal relates to those fees and charges that are levied within the Corporate Services Directorate.

It should be noted that whilst this proposed increase may be lower than some current national inflationary measures such as the Retail Prices Index or the Consumer Prices Index, it 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. This budget saving sum will be shared across all relevant service area budgets within the directorate.

Please note, that where it is possible to increase income levels above this baseline sum, then a specific MTFP savings proposal will be tabled within the papers, so that it is possible to review the individual impacts of such proposal as these could be different for each service.

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 – 2022/23 MTFP budget proposal to increase income budgets

If yes, please describe what steps you have taken to review the equality impacts from previous years?

n/a

2. Customer equality impact summary

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

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			
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				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, armed forces community, 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. Please describe both positive and negative impacts.

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.

Please describe how you will communicate these changes to your customers

Annual fees and charges are approved prior to the start of each financial year with the decision maker being dependent upon the level of the increase. For example.

- increases below 5% are approved by the relevant Director
- increases between 5% and 10% are approved by the relevant Executive Member
- increases over 10% are approved by the Executive

When fee increases have been agreed they will be published on the council's website.

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
	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:

13th November 2022

Medium Term Financial Plan Initial Equality Impact Assessment 2023/24



1. The Proposal

Directorate:	Children's Services, Place, Corporate Services
Service area:	All Areas
Budget references:	CH05, CSD25 , PD39
Budget reduction proposal:	Increase vacancy management target within Corporate Services staffing budgets
Budget saving for this financial year:	£245,000 PD39 - £70,000 CSD25 – £75,000 CH05 - £100,000

Description of the proposal:

Each of the Directorates will increase its budgeted vacancy management targets to reflect the saving that will be incurred as a result of having vacancies within the staffing structures during the year.

Summary of changes:

The changes will require the management team to continue to take a proactive approach to managing vacancies to ensure that the financial target is met, although given that this represents an increase in current levels, procedures are already in place to support this. Analysis shows that historically this level of savings has been met and are therefore considered achievable, although given that in previous years additional savings have been used as a way of managing potential overspends, this proposal could bring slightly more financial risk to the overall 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?

If yes, please describe what steps you have taken to review the equality impacts from previous years?

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, armed forces community, 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. Please describe both positive and negative impacts.

The proposals are unlikely to have a significant impact on customers as vacancy management targets are always managed to ensure that staffing structures where there is a direct impact on vulnerable group are protected.

Please describe how you will communicate these changes to your customers

None, as no planned direct impacts

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.

It is not possible to identify what posts or teams will be affected as it will depend on where vacancies arise and how quickly they are filled. There is a risk that, when staff leave, the remaining staff will be asked to reprioritise workloads.

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

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: Katherine Sokol

Date: 6 January 2023

