

DRAFT Initial Budget Equality Impact Assessment

1. The Project

Directorate:	Adult Social Services and Housing
Theme or area:	Income
Lead Officer:	Graham Booth
Date:	3 December 2025

Budget Reference	Budget Proposal	Budget reduction (£)		
		2026/27	2027/28	2028/29
ASH14	Introduce Online Financial Assessments	75,000	25,000	

Description of the project:

In January 2025 we introduced a new tool embedded into our website that allows people to use a calculator to find out what they may need to pay towards the cost of their care. The calculator can be used stand alone for fact finding, or details can be submitted for a full Financial Assessment following a Care Assessment.

If the calculator is used no information is stored unless it is submitted. When details are submitted, they are processed and stored securely and linked to the persons record on our Social Care Case Management System. The Financial Assessment team will receive completed OFA details and then a full financial assessment can be completed.

The idea is that we start to encourage people to use this from the first time they contact us about an assessment or are on a hospital discharge pathway that may involve some chargeable social care. The tool can be completed by the person themselves, or, with the persons consent by someone who supports them such as friends or family.

We have processes in place to ensure that care is not delayed in an emergency situation or where the person is unable to complete the financial assessment themselves and does not have a representative.

Are any of the proposals within this theme a continuation of a previous medium-term financial plan saving?

Yes No

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

Budget Proposal	Year of assessment	Budget Reference
Introduce Online Financial Assessments	2024/25	ASH12

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

Initial impact last year was deemed low so no EIA completed.

2. Customer equality impact summary

Will the changes proposed in this project have a disproportionate impact (or bias) for 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, - = Negative

Protected or significant group	Impact Level				Impact type	
	H	M	L	N	+	-
Disabled people (Including the consideration of neurodiversity)			X		X	
People from different ethnic groups				X		
Men or women (including those who are pregnant or on maternity leave)				X		
People who are LGBTQ+				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		
People who are undergoing gender reassignment				X		
Other significant groups, for example: Armed Forces Community, care experienced young people, carers, parents. Please specify:						

3. Explanation of customer impact

The aim of the project is to let people know the level of their contributions towards their care as early in the process as possible. Before online financial assessment there

were often delays in confirming the contribution amounts and some people may have built up a debt in the time they had received a service but weren't able to be charged until the Financial Assessment was completed. The tool also gives an early indication if the person may be self-funding and can therefore organise their own care or engage with a care navigator rather than wait for a Care Act assessment.

Please describe how you will communicate these changes to those impacted.

Website has been updated to signpost to this new feature, all staff who have contact with potential service users have been briefed to introduce the tool and encourage it's use at the earliest opportunity.

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. Cumulative equality impacts

Is this project linked to or likely to have an impact on any other service areas?

For example are you moving the location of a service that may also be impacted upon by a change to public transport provision.

n/a

6. Action Plan

Are there any further actions that should be taken because of this Equality Impact Assessment?

Issue Identified	Planned Action	Lead Officer	Time for review

7. Review and Sign Off

Service Manager Review

Insert any service manager comments here.

<<Text here>>

Is a further detailed equality impact assessment needed?	Yes	No
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Please note that if this assessment indicates a potential 'medium' or 'high' impact on any protected or significant group a further, more detailed assessment will be required.

If 'yes', when will the further assessment be completed?	N/A
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Service Manager:	Graham Booth
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Date:	3 December 2025
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