

# DRAFT Initial Budget Equality Impact Assessment

## 1. The Project

**Directorate:** Adults Social Services & Housing

**Theme or area:** **Social Care Funding**

**Lead Officer:** Ros Cox

**Date:** 26 November 2025

		Budget reduction (£)		
Budget Reference	Budget Proposal	2026/27	2027/28	2028/29
ASH15	Policy Change for Self-Funders requiring LA funding	£200,000		

### Description of the project:

#### [Choice in Care and Support Strategy](#)

This strategy sets out how we approach exceptional payments. It sets out clearly that we will not fund non-eligible needs and where a person wants to opt for a more expensive care and support package, they can fund a “third party top up”.

Where a person requires a “third party top up” to meet their care and support needs e.g. they are not residing in a care home or specific room that accepts North Somerset rates. Or that they wish to use a care agency that is not one of North Somerset Council’s Strategic Providers, an assessment of need is completed through the Care Act Assessment process. Only if there are exceptional circumstances why the specific care home/room or agency are required to meet eligible needs will funding be approved.

This decision is then brought to the Eligibility Resource Forum for joint discussion to explore alternatives and ultimately senior managers sign off.

### Summary of changes

The Choice in Care and Support Strategy sets out how we will financially support and meet eligible needs

We will apply additional scrutiny to all situations where North Somerset Council provides an "Exceptional Payment", so that a wider range of options are explored to meet the person's eligible needs.

Where it is found that non-eligible needs are met, a Care Act Review would be required to ensure the Choice in Care and Support Strategy is being met and we make legally defensible decisions.

**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

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

<<Text here>>

## 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: Families of the person in care		X				

### 3. Explanation of customer impact

People who receive funded care and support come to rely on the level of support provided to them. Reducing or changing a package of support can be empowering but can also be distressing. There may be some level of disagreement between the person, the family and the assessment of needs.

If we ask for the third party top up to be paid for non-eligible needs, where we previously paid this. The person may feel unable to afford the top up.

Where exceptional support is offered to a self-funder that subsequently meets the financial threshold for support, but lives in a care home that declines to take North Somerset rates, alternative cheaper solutions will be considered to support a move to a new care home unless that care home is the only place that can meet their needs or is the equivalent cost to an alternative. A move for anyone who has lived in the same place can be distressing as they have built relationships with the staff/owners/residents.

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

Individual assessments will be needed for all potentially affected people, to identify if we are meeting non-eligible needs through our funded support. All changes would be considered by the Eligibility Resource Forum and communicated via the allocated Social Work staff member.

### 4. Staff equality impact summary

<b>Are there any staffing implications for this proposal?</b>	Yes	<b><u>No</u></b>
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#### **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.

Reviews currently take place every 12-18 months. More staff resource would be needed to hold earlier reviews of care and support.

### 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.

ASH 01 Reablement: Widening community access to reablement should have a positive equality impact if the therapy team can support with promoting independence.

ASH 10: Person's Journey: Any reviews associated with ASH15 will be competing for staff resource allocated to the Person's Journey project.

## 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
Scale of impact not known	<p>Audit all care and support packages where exceptional support is offered.</p> <p>Identify a cohort of people where a review may support a saving from the list of all people receiving an Exceptional Payment.</p>	Jo Hopkins	
Staff are unclear when exceptional circumstances will be accepted	<p>Reminder to be sent to all staff re: The Choice in Care and Support Strategy.</p> <p>Produce practice guidance with examples, that do not fetter discretion. All staff to be informed to work to the cheapest solution possible that meets eligible needs.</p>	Jo Hopkins/ Ric Orson	
Identify a staffing resource to complete Care Act Assessment Reviews for any person identified in the audit	<p>Look at co-dependencies of saving proposals to prioritise highest saving potential before allocating staff resource.</p> <p>E.G People residing in care homes where there are no block beds in a home, as these are not routinely monitored by brokerage.</p> <p>Existing process (ERF) will be used for any potential changes with significant scrutiny.</p>	Ros Cox	
There may be no cheaper alternative to the care and support already in place.	<p>Joint work will be required across adult social care teams to identify alternative cheaper solutions. The ERF Forum will be used for</p>	Ros Cox	

	<p>collaborative decision making.</p> <p>Brokerage team already seek to move people from Non-NSC rates to block bed rates where these arrangements are in place.</p> <p>Where there is a shortage of a specific type of placement, this will be noted in the routine ERF report.</p>		
<p>We do not currently report on the qualitative reasons for payments in exceptional circumstances in an easily reportable method.</p>	<p>Produce a report for DLT using ERF data.</p> <p>Escalate implications of the data at Wider DLT to discuss solutions.</p> <p>ERF chairs to record exceptional circumstances in authorisation notes to enable quick audit.</p> <p>Build automated reporting into new LAS model</p>	Ros Cox	
<p>Self-funders do not understand the details of how decisions are made when thresholds are met.</p>	<p>Expectation management for people moving into a care home who are self-funding by working collaboratively with care navigators and providers that do not accept North Somerset rates.</p>	Gerald Hunt	

## 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

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.

**January 2026**

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

**Service Manager:**

Jo Hopkins

**Date:**

1 December 2026