**Equality impact assessment for financial plans**

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| **Financial Plan** | Property Services - Service Plan |
| Name of directorate and service | Resources Directorate; Property Services |
| **Name and role of officers completing the EIA** | Louise Madden – Projects Liaison Officer  Julie Bromley – Resources Manager |
| Date of assessment | November 2011 |

This Equality Impact Assessment (EAI) is used to systematically analyse a financial plan to identify what impact or likely impact it will have on different groups within the community.  It should identify any discriminatory or negative consequences for a particular group or sector of the community but will also higlight beneficial impacts.

It is intended that this is used as a working document throughout the EIA process, with a final version including the action plan section being published on the Council’s and NHS Bath and North East Somerset’s websites.

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| **1.** | | **Identify the scope of the financial plan** | | | |
|  | | **Key questions** | | **Answers / Notes** | |
| **1.1** | | Briefly describe the aims of the financial plan including   * How the financial plan is delivered and by whom * If responsibility for its implementation is shared with other services or organisations * Intended outcomes | | * *To facilitate the delivery of Property Services’ responsibility for supporting the Council’s vision, core values and priorities.* * *To ensure maximum economy, efficiency and effectiveness in the use of property assets* * *To contribute to the sustainability of the Council’s budget in the medium term* | |
| **1.2** | | Provide brief details of the scope of the financial plan being reviewed, for example:   * Is it a new financial or review of an existing one? * Is it a national or legislative requirement? * How much room for review is there? | | Developed as part of the Resources MTSPR (medium term service and resource plan), this is the annual Service Action Plan for Property Services. It is submitted to Resources Policy Development & Scrutiny Panel for discussion on 16th January 2012 as part of the Resources directorate service action plan.  It is a high-level annual plan for the delivery of the key services to the Council from Property Services. | |
| **1.3** | | Do the aims of the financial plan conflict with any other financial plan or service activity of the Council or Partnership? | | No apparent conflict. | |
| **1.4** | | What steps have you taken to ensure your financial plan does not *inadvertently* affect another service? | | * Financials have been reviewed outside of the service area and the whole document has been internally reviewed for impact upon other services. * Individual discussion with Divisional Directors. * The results of a review session with Divisional Directors at an equalities workshop in Nov 2011). | |
| **2. Consideration of available data, research and information** | | | | | |
| You need to show that you have made decisions based on evidence. Monitoring data and other information can help you analyse whether you are developing fair financial proposals: a decision which is informed by relevant local and national data about equality is a better quality decision. Please consider the availability of the following as potential evidence:   * Demographic data and other statistics, including census findings * Recent research findings * Results from recent consultation or surveys * Service user monitoring data (including ethnicity, gender, disability, religion/belief, sexual orientation and age) * Information from relevant groups or agencies, for example trade unions and voluntary and community organisations * Analysis of records of enquiries about your service, or complaints or compliments about them * Recommendations of external inspections or audit reports | | | | | |
|  | | **Key questions** | | **Data, research and information that you can refer to** | |
| **2.1** | | What equality training have those who developed the financial plan received? | | Most managers involved in the plan have participated in Council-led equalities training, including training relating to EIA’s. | |
| **2.2** | | What is the equality profile of the employees who will be affected by this financial plan? Are there any particular staffing issues? (e.g. high proportion of female workers etc) | | The main affect of the plan on staff relates to the loss of a small numbers of posts across the service by a decision to delete vacant posts – this should have little direct impact. The Workplaces programme within the plan, promoting flexible working may have an impact on how all members of staff work across the Council. | |
| **2.3** | | If there are proposed staffing reductions: what are the potential knock-on effects of this on other service areas including other public services where we collectively serve our citizens? | | The assessment at this stage is that there should be very little affect upon staff, other services or the community. | |
| **2.4** | | What is the equality profile of service users who will be affected by this financial plan? | | The plan relates to services that in the main are an internal function of the Council. The exceptions being school meals and community meals where the service users are young people and, in the main, older vulnerable adults. The service interacts with various stakeholders and as identified in the plan, may see increased levels of engagement with community groups under the Localism agenda. | |
| **2.5** | | What do you know about service users’ needs in relation to this service area? (e.g. results of customer satisfaction surveys, results of previous consultations) | | Customer satisfaction for catering suggests the current service provided is right. | |
| **2.6** | | Are there any gaps in the data, research or information that is available? What additional information would assist you in developing your financial plan? | | At present, it is unclear what level of interaction there will be with community groups and the equalities profile of these groups is unknown. | |
| **2.7** | | What consultation have you carried out on your financial plan? | | Members of staff have been encouraged to review the plan and to make a contribution during drafting. The plan will be discussed at regular meeting with trades unions reps. | |
| **3. Assessment of impact** | | | | | | |
|  | Based upon any data you have analysed, or the results of consultation or research, use the spaces below to list how the financial plan:   * Meets any particular needs of each of the equality groups or helps promote equality in some way. * Could have a negative or adverse impact for each of the equality groups | | | | | |
|  | **Identify the impact / potential impact of the financial plan on** | | **Examples of how the financial plan promotes equality** | | **Examples of potential negative or adverse impact and what steps have been or could be taken to address this** | |
| **3.1** | **Age** –  different age groups | | Neutral | | The needs of young people and older people should be considered if Schools and Community meals are included within the traded services review. | |
| **3.2** | **Disability** –  Disabled people (ensure consideration of a range of impairments including both physical and mental impairments) | | Neutral | |  | |
| **3.3** | **Gender** –  women and men | | Neutral | |  | |
| **3.4** | **Gender identity -**  transgender people | | Neutral | |  | |
| **3.5** | **Race** –  People from black and minority ethnic groups | | Neutral | |  | |
| **3.6** | **Religion / belief** –  people of different religious/faith groups and those with no religion or belief | | Neutral | |  | |
| **3.7** | **Rural communities** –  people living in rural communities | | Neutral | |  | |
| **3.8** | **Sexual orientation -**  lesbian, gay, bisexual & heterosexual people | | Neutral | |  | |
| **3.9** | **Socio-economically disadvantaged** –  people who are disadvantaged due to factors like family background, educational attainment, neighbourhood and employment status | | Neutral | |  | |
| **4. Monitoring and review** | | | | | | |
| **4.1** | What arrangements have you put in place to monitor the *actual* effect of your financial plan following its implementation? | | The plan will be reviewed every three months by the department’s management team. | | | |

**5. Bath and North East Somerset Council & NHS B&NES Equality Impact Assessment Improvement Plan**

The outcome of this EIA will fall into one of four categories:

Please tick which is appropriate:

|  |  |  |
| --- | --- | --- |
| 1 | No major change required |  |
| 2 | Adjustments to remove barriers identified by EIA or to better promote equality |  |
| 3 | Continue despite having identified some potential for adverse impact or missed opportunities to promote equality |  |
| 4 | Stop and rethink |  |

List actions below that you plan to take as a result of this EIA. These actions should be based upon the analysis of data, any gaps in the data you have identified, and any steps you will be taking to address any negative impacts or remove barriers. The actions need to be built into your financial plan and future service planning framework. Actions/targets should be measurable, achievable, realistic and time framed. (Add rows as appropriate)

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| --- | --- | --- | --- | --- |
| **Issues identified** | **Actions required** | **Progress milestones** | **Officer responsible** | **By when** |
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**5. Sign off and publishing**

Once you have completed this form, it needs to be ‘approved’ by your Divisional Director or their nominated officer. Following this sign off, send a copy to the Equality Team ([equality@bathnes.gov.uk](mailto:equality@bathnes.gov.uk)), who will publish it on the Council’s and/or NHS B&NES’ website. Keep a copy for your own records.

**Signed off by**: Tom McBain (Divisional Director or nominated senior officer) **Date:** 13/12/2011