**Equality impact assessment for financial plans**

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| **Financial Plan** | Property Services – Service Impact Statement 2013-16 |
| Name of directorate and service | Property Services, Resources and Support Services |
| **Name and role of officers completing the EIA** | Julie Bromley – Business Support Manager |
| Date of assessment | October 2012 |

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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 | | | Our guidance shows us that the plan is used to:   * *To facilitate the delivery of the Services responsibility within the Council’s Corporate Plan and Bath & North East Somerset’s Community Strategy and to achieve established policy priorities* * *To ensure maximum economy, efficiency and effectiveness in the use of financial resources* * *To ensure the sustainability of the Council’s budget in the medium term* * *To facilitate proactive, strategic management of the Council’s budget* * *To guarantee responsiveness to an ever-changing and uncertain financial climate* | |
| **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 MTSRP (medium term service and resource plan), this is the Service Impact Statement for Property Services. It is submitted to Resources Policy Development & Scrutiny Panel for discussion in November 2012 as part of the Resources directorate Medium Term Service and Resource Plan.  It is a high-level 3 year plan for the delivery of savings and income generation for 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 September 2012). | |
| **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 effect of the plan on staff relates to the loss of a number of posts across the service. Property Services employees a wide range of ages, with predominance to an older workforce. There is a wide range of educational backgrounds. At April 2012 there were 432 employees (around half of these within Cleaning and Catering). The split is approximately 72% female to 28% male. The age profile at April 2012 was  <20 = 4 / 20-39 = 104 / 40-49 = 133 / 50-59 = 128 / 60+ = 63 | | | |
| **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 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. | | | |
| **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) | n/a | | | |
| **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? | n/a | | | |
| **2.7** | | What consultation have you carried out on your financial plan? | The plan will be discussed at regular meeting with trades unions reps. The Resources MTSRP will be discussed at PDS Panel in November 2012. | | | |
| **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** | **All people covered by equality Act ‘protected characteristics’** | | | 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:

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| 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** |
| **Training**  As a Service we are committed to promote and embed an equality culture. | All managers have had equalities training however we shall ensure any refresher training is undertaken when appropriate to enable managers to advance equality of opportunity, ensure relevant respect is paid to employee identities and cultures identify any training requirements and deal with any changes post the recent Equality Act 2010. | This point will be raised at Property Senior Management Team meeting (Dec 2012) and then reviewed with managers by end of March 2013 | DD Property & SMT | March 2013 |
| **Equality analysis**  Re-prioritizing Equality Impact Assessments – as directed under the recent Equality Act 2010 – we shall undertake a full EIA with reference to the staffing reductions when finalized - which will be available to staff and unions. | As the Property Services staffing reductions progress, consultation and communication will be undertaken with all appropriate staff. Senior managers will attend team meetings and the Divisional Director will address any issues raised at Open Forum3 | When staff review is confirmed a full EIA will be untaken | DD Property & SMT | When structure confirmed |
| **Update equality impact assessments**    Previous Equality Impact Assessments will be reviewed and appropriate actions undertaken as required. |  |  |  |  |

**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)

**Date:** December 2012