

Summons to attend meeting of Full Council



Budget

Date: Tuesday, 20 February 2024

Time: 2.00 pm

Venue: The Council Chamber - City Hall, College Green,
Bristol, BS1 5TR

To: All Members of Council

Issued by: Oliver Harrison, Democratic Services

City Hall, PO Box 3399, Bristol, BS1 9NE

Tel: 0117 3526162

E-mail: democratic.services@bristol.gov.uk

Date: Friday, 9 February 2024



Agenda

1. Welcome and Introductions

(Pages 4 - 10)

2. Apologies for Absence

3. Declarations of Interest

To note any declarations of interest from the Councillors. They are asked to indicate the relevant agenda item, the nature of the interest and in particular whether it is a **disclosable pecuniary interest**.

Any declarations of interest made at the meeting which is not on the register of interests should be notified to the Monitoring Officer for inclusion.

4. Minutes of the Previous Meeting

To agree the minutes of the previous meeting as a correct record.

(Pages 11 - 30)

5. Lord Mayor's Business

To note any announcements from the Lord Mayor

6. Public Petitions and Statements

Under the Council's constitution, there is no provision for public forum at the Budget Council meeting. However, in consultation with the Mayor and other party group leaders, the Lord Mayor has determined that public petitions and written statements will be accepted for this meeting on the following basis:

1. Petitions and statements for this meeting must be about the budget/reports included on the agenda.
2. The wording of all petitions and all written statements must be submitted by the deadline of 12 noon on Friday 16 February. Petition details / written statements should be sent to: democratic.services@bristol.gov.uk
3. Questions are not permitted on this occasion.
4. Details of all petitions and statements submitted will be sent to the Lord



Mayor, Mayor and all councillors as soon as possible after the above deadline.

5. At the meeting, the Lord Mayor will permit a brief opportunity for petitions to be presented at the start of the meeting (up to 1 minute for each petition), to allow petitioners to formally present their petitions and to confirm the final number of signatures. The Lord Mayor will ask Full Council to receive and formally note all petitions and written statements received.

7. Budget Report 2024/25

Includes Equalities Impact Assessments.

(Pages 31 - 644)

The budget report from the Resources Scrutiny Commission will be published separately.

Signed



Proper Officer
Friday, 9 February 2024



Public Information Sheet - Full Council

Inspection of Papers - Local Government (Access to Information) Act 1985

You can find papers for all our meetings on our website at www.bristol.gov.uk.

Attendance at Full Council

Bristol City Council welcomes public attendance and participation at Full Council. When attending the meeting please behave with courtesy, tolerance and respect at all times to Councillors, Council Officers and other meeting participants. Attendees who cause disturbance may be asked to leave or, may be removed from the meeting.

Members of the press and public who plan to attend Full Council are advised that you will be **required to sign in** when you arrive and you will be issued with a visitor pass which you will **need to display at all times**.

Please be advised that you may be asked to watch the meeting on a screen in another room should the numbers attending exceed the maximum occupancy of the meeting venue.

Fire Safety Information

In event of a fire alarm please calmly leave by the nearest fire exit. The assembly point is by the side of the Cathedral.

COVID-19 Prevention Measures

We request that no one attends a Council Meeting if they:

- are suffering from symptoms of COVID-19 or
- have tested positive for COVID-19

Public Forum – Budget Full Council

Members of the public who live or own a business in Bristol may submit a written petition or statement to Budget Full Council. Please submit it to democratic.services@bristol.gov.uk.

Petitions and Statements submitted **must** relate to the budget report presented to Council.

- By contributing to the public forum process the participant acknowledges that any content submitted is at the authors own risk and the Council disclaims any obligation or responsibility for it.



- Questions, Statements and Petitions should be factually based and should not contain anything that could be construed as being defamatory, frivolous or offensive. Any submission including such information shall be redacted prior to publication without notice to the author.
- The Council reserves the right to reject any submission it deems defamatory, frivolous or offensive at its sole discretion.
- Sensitive personal information may be deleted or redacted.
- Officer's names below Head of Service, will be replaced by the Officer's job title.
- Company names may be deleted or redacted.

For further information about procedure rules please refer to our Constitution
<https://www.bristol.gov.uk/how-council-decisions-are-made/constitution>

Petitions from members of the public

- Petitions will be presented to the Council first.
- Petitions must include name, address and details for the wording of the petition.
- It is not permitted to speak to the petition in person at this meeting.
- A written reply will be provided to the lead petitioner within 10 working days of the Full Council meeting.

Statements

- Statements should be received no later than **12.00 noon two working days before the meeting**.
- For this meeting statements will not be invited to be read out. They will be circulated to the Lord Mayor, Mayor and Councillors in advance and noted at the meeting.
- There can be only one statement per person and any statement submitted should be no longer than one side of A4 paper.
- For copyright reasons, we are unable to reproduce or publish newspaper or magazine articles that may be attached to statements.

Questions

- There are no public forum questions at this Budget Meeting.

By participating in public forum business, we will assume that you have consented to your name and the details of your submission being recorded and circulated to the Committee and published within the minutes. Your statement or question will also be made available to the public via publication on the Council's website and may be provided upon request in response to Freedom of Information Act requests in the future.

We will try to remove personal and identifiable information. However, because of time constraints we cannot guarantee this, and you may therefore wish to consider if your statement contains information that you would prefer not to be in the public domain. Committee information on the council's website may be searchable on the internet.



Other formats and languages and assistance for those with hearing impairment

You can get committee papers in other formats (e.g. large print, audio tape, braille etc) or in community languages by contacting the Democratic Services Officer. Please give as much notice as possible. We cannot guarantee re-formatting or translation of papers before the date of a particular meeting.

Committee rooms are fitted with induction loops to assist people with hearing impairment. If you require any assistance with this please speak to the Democratic Services Officer.

Arrangements for Full Council

The allocated public gallery for Full Council is available for members of the public to observe the Full Council meeting.

The Lord Mayor has determined:

- Attendees should please be quiet and not interrupt proceedings.
- Large bags will be left at reception.
- All loud hailers, banners, and placards must be left at the main entrance and will not be permitted to be brought into the building.
- The Council reserves the right to remove any person who disrupts the proceedings. In appropriate circumstances, the police may be called.

Under our security arrangements, all members of the public (and bags) will be searched. This applies to all members of the public attending the meeting in the interests of helping to ensure a safe meeting environment for all attending. Visitors' bags are liable to be searched prior to entry, and entry is conditional upon visitors consenting to be searched. Searches are carried out to ensure that no items which may interrupt proceedings are brought into the building. Small notices may be acceptable if they are not obstructive or offensive (no more than A4 size).

The privacy notice for Democratic Services can be viewed at www.bristol.gov.uk/about-our-website/privacy-and-processing-notice-for-resource-services



Full Council Budget Meeting Tuesday 20 February 2024

You can find papers for all our meetings on our website at www.bristol.gov.uk. For further information about procedure rules please refer to our Constitution <https://www.bristol.gov.uk/how-council-decisions-are-made/constitution>

Opening Session

1. The Mayor will introduce the report, summarise, and move it.
2. The Cabinet Member - Finance, Governance and Performance will second the report.
3. Each party group will be given the opportunity to respond to the budget proposals in order of size of group
4. The Chair of Overview and Scrutiny Management Board (OSMB) and/or the Chair of Resources Scrutiny Commission will then be given an opportunity to present comments on behalf of the Board.

Amendments

Amendments have been accepted on the following basis:

- The amendment is technically possible.
 - The net financial impact of the amendment on the budget in any financial year must be zero.
 - The amendment cannot use capital budgets in place of revenue.
 - All amendments have been subject to an overview of the potential impact with the assessment outlined alongside the specific amendment.
5. Each amendment will be moved, seconded, debated and voted on in the order shown in the agenda papers. Reasons for the proposed amendment will be clearly stated. The Mayor or relevant Cabinet member will respond to each amendment and sum up, before it is voted on. The vote on each amendment is carried on a simple majority of those voting.
 6. As the amendments are voted on, the Lord Mayor will be advised as necessary if certain amendments effectively “fall by default” due to an earlier amendment(s) being carried.
 7. Once all amendments have been voted on, after consultation with the Section 151 officer (the Director: Finance) the Lord Mayor will confirm the position as necessary in terms of which budget amendments were carried. The Lord Mayor (seconded by Deputy Lord Mayor) will then move that Full Council note the Section 151 Officer’s statement as required under the Local Government Act 2003.



General Debate on budget proposals

8. The Lord Mayor will then invite general debate on the budget proposals as they stand (i.e. the revenue and capital budget).
9. The Mayor to sum up at the end of the debate.

Following the debate

If budget amendments were carried, proceed to point '10' below.

In the event that no budget amendments were carried and the budget is proposed as set out in the agenda, proceed straight to point '11' below.

10. If the Mayor decides to accept the amended budget, then he will indicate to the meeting and the Monitoring Officer accordingly.
11. If the budget is amended, the Mayor has until Tuesday 27 February 2024 to consider any amendments and his response. He may:
 - a. accept the budget as now amended; or
 - b. he may resubmit his original (unchanged) proposals, stating his reasons; or
 - c. he may submit alternative proposals, stating his reasonsA reserve meeting date of Wednesday 28 February 2024 is available should it be required.

When the budget recommendations (amended or not) are to be put to the vote

12. The Lord Mayor will propose the recommendations (as amended or not) and these will be seconded by the Deputy Lord Mayor.

The Mayor's Budget Proposals

The approval of the Mayor's budget proposals to Council in respect of 2024/25 as set out in this report, subject to any agreed amendments:

To note:

- a) The report from Overview and Scrutiny Management Board (OSMB) and/or the Resources Scrutiny Commission that will be published separately.
- b) The budget consultation process that was followed and feedback as outlined in Section 18 and Appendix 6.
- c) The categorisation of earmarked reserves and provisions set out in Section 15.
- d) That the budget consultation feedback and equality impact assessments have been taken into consideration and have informed the final budget proposals.

- e) The feedback provided by Bristol Schools Forum for Cabinet and Council, for consideration in making final decisions on the Dedicated Schools Budget for 2024/25 as set out in Appendix 14.
- f) The Section 25 Statement of the Chief Finance Officer (s151 Officer) on the robustness of the budget and adequacy of reserves as set out in Section 17.

To agree:

- g) Subject to (h) below, the Bristol City Council levels of Council Tax increase of 4.99%; which includes 2% precept to support Adult Social Care, noting the precepts of the Police and Crime Commissioner for Avon and Somerset and the Avon Fire Authority.
- h) In relation to determination of Council Tax, in the event that Avon Fire Authority has not set its precept by 20 February, Full Council agrees to constitute a subcommittee of the Council, with membership to be agreed, and to delegate authority to the committee to note the precept subsequently set by Avon Fire Authority and approve the calculations for determining the Council Tax requirement for the year 2024/25 (the levels of council tax as set out in recommendation g) to be outlined in an updated Appendix 11 and in accordance with the Local Government Finance Act 1992.
- i) The Council's General Fund net revenue budget for the year 2024/25 as £530.1 million and expenditure allocations as set out in Appendix 1; subject to any budget amendments properly notified to and approved by the council in line with the Constitution.
- j) That supplementary estimates be approved as part of the Budget 2024/25 Report in the case that they are required to meet Q3/P8 2023/24 full year forecast spending requirements (see Appendix 15)
- k) The council's capital budget and programme for the years 2024/25 – 2033/34, totalling £2.7 billion for the General Fund and Housing Revenue Account.
- l) The strategic Community Infrastructure Levy allocations in section 13 (Table 28) are approved.
- m) The proposed Treasury Management Strategy for 2024/25 in Appendix 4, incorporating the Minimum Revenue Provision policy and the prudential indicators and limits.
- n) To approve the Strategy for the Flexible use of Capital Receipts as set out in Appendix 5.
- o) To approve the changes to Council Tax for empty homes (long term empty dwellings that are substantially unfurnished) and for second homes (dwellings that are occupied only periodically and are substantially furnished) in Appendix 12 be applied from 1 April 2024, or as soon as possible thereafter, subject to the required legislation being in place.

To agree:

- p) The distribution of the 2024/25 Dedicated Schools Grant of £491.7 million as recommended by Cabinet and the Schools Forum, summarised below, and set out in Section 9.
- i. The Schools Block budget set at £342.6 million, after transferring £1.7 million of the overall Schools Block to the High Needs Block as a contribution to the accumulated High Needs deficit.
 - ii. The Growth Fund for established schools expanding in September 2024 be set at £2.0 million (a component of the total Schools Block budget).
 - iii. The basis for distributing the funding to mainstream schools as set out and agreed by Schools Forum
 - iv. The High Needs Block budget be set at £91.3 million, after receiving transfers of £1.7 million from Schools Block.

v. The Early Years Block budget be set at £55.2 million and distributed in line with the arrangements agreed with the Schools' Forum, noting that spend and income will fluctuate, according to participation levels in each of the three school terms.

To agree:

- q) With regards to the Housing Revenue Account (HRA)
 - i. The HRA Revenue budget of £151.0 million for 2024/25 as set out in Section 11.
 - ii. A rent increase of 7.7% with effect from April 2024, applicable to HRA dwelling and non-dwelling rent.
 - iii. Note the refreshed HRA 30-year outline business plan and finance model established within the affordability principles in the capital strategy, and that this will be subject to annual review and in-depth review on a rolling 5-year basis, summarised in Section 11.

To delegate authority:

- r) To the Director of Finance after consultation with Designated Deputy Mayor with responsibility for Finance, Governance and Performance and the Mayor, to make any necessary technical adjustments that may be required to the budget with transfers to and or from reserves as appropriate.
- s) To the Corporate Leadership Board to align the transformation funding of £6.1 million to the agreed transformation programmes across the council to enable the delivery of agreed benefits and improved outcomes.
- t) To the Executive Director of Growth and Regeneration, in consultation with the Designated Deputy Mayor with responsibility for Finance, Governance and Performance, to set HRA service charges in line with the anticipated and actual cost of running each service.
- u) To Cabinet to approve (subject to consultation where required) any further DSG mitigation proposals for commencement in 2024/25.

Bristol City Council Minutes of the Full Council

9 January 2024 at 2.00 pm



Members Present:-

Councillors: Mayor Marvin Rees, Amal Ali, Donald Alexander, Jenny Bartle, Nicola Beech, Marley Bennett, Mark Bradshaw, Fabian Breckels, Andrew Brown, Craig Cheney, Jos Clark, Sarah Classick, Amirah Cole, Asher Craig, James Crawford, Carla Denyer, Kye Dudd, Tony Dyer, Richard Eddy, Emma Edwards, Jude English, Tessa Fitzjohn, Martin Fodor, John Geater, Paul Goggin, Geoff Gollop, Zoe Goodman, John Goulandris, Katy Grant, Fi Hance, Tom Hathway, Helen Holland, Gary Hopkins, Katja Hornchen, Jonathan Hucker, Philippa Hulme, Chris Jackson, Ellie King, Tim Kent, Heather Mack, Mohamed Makawi, Brenda Massey, Henry Michallat, Patrick McAllister, Yassin Mohamud, Graham Morris, Paula O'Rourke, Barry Parsons, Steve Pearce, Ed Plowden, Guy Poultney, Kevin Quartley, Tom Renhard, Tim Ripington, James Scott, Sharon Scott, Steve Smith, Ani Stafford-Townsend, Lisa Stone, Christine Townsend, Andrew Varney, Mark Weston, David Wilcox, Chris Windows and Tim Wye

1 Welcome and Introductions

The Lord Mayor welcomed all attendees to the meeting and issued the safety information.

2 Apologies for Absence

Apologies for absence were heard from Councillors Lesley Alexander, Bailes, Davies, Francis and Hussain.

3 Declarations of Interest

None received.

4 Minutes of the Previous Meeting

On the motion of the Lord Mayor, seconded by Councillor Parsons, it was

RESOLVED:



That the minutes of the meeting of the Full Council held on the 12 December 2023 be confirmed as correct record and signed by the Lord Mayor.

5 Lord Mayor's Business

There was none.

6 Public Petitions, Statements and Questions

Public Petitions and Statements:

Full Council received and noted the following petitions and statements (which were referred to the Mayor for his consideration)

Ref No	Name	Title
PP01	Adam Streames	Stop Bristol City Council from taking a % of your Turnover if you're a mobile park trader

Ref No	Name	Title
PS01	Jenny Ross	Four Fact Statement
PS02	Pam Patterson	Three Asks Statement
PS03	Jen Smith	LGO Decisions
PS04	Hasina Khan	Bristol City Council, swallow your pride and join the call to end the genocide
PS05	Paul Becker	Golden motion on empty homes
PS06	Nigel Varley	Gilton House, Brislington
PS07	Katy Taylor	A call for change: Value the Caring economy
PS08	Mubashar Chaudhry	In support of Gaza Israel conflict petition
PS09	Hilary Rydon	Golden Motion by the Green Party
PS10	Christina Biggs	Funding of rail-bus interchange for MetroWest stations
PS11	David Redgewell and Gordon Richardson	The of City and County of Bristol new committee structure
PS12	Danica Priest	Golden motion
PS13	WITHDRAWN	
PS14	Alderman Mhairi Threlfall	Childcare is infrastructure.
PS15	Mary Page	Item 13 Members' Allowances.
PS16	Sarah Freeman	Bristol city council allotment consultation 11/12/23 – 22/1/24



Within the time available, Petition PP01 and statements PS01, 02, 04, 06, 07, 08, 11, 12 and 14 were presented by individuals at the meeting.

Public Questions

Full Council noted that the following questions had been submitted:

Ref No	Name	Title
PQ01	Mhairi Threlfall	Family Hubs & the Social Care Precept
PQ02	Claire Charras	Money for Care in all Strategies
PQ03	Katy Taylor	Will you value the caring economy
PQ04	Troy Tanska	Time to Care with Dignity
PQ05	Sue Cohen	Social Care Workers
PQ06	Liz Potter	Nursery Provision in Crisis
PQ07	Dahlia von Coralath	Council Accountability for Contractor Performance
PQ08	Sophie Peart	Worker Conditions in Commissioned Contracts
PQ09	Bonny Chung	Coproduction with Carers
PQ10	Josephine Benefield	Gaza Ceasefire
PQ11	Hasina Khan	Gaza Ceasefire
PQ12	Suzanne Audrey	Mayor's TED Talk
PQ13	Suzanne Audrey	Fujitsu Post Office Horizon Scandal
PQ14	Jenny Etches	Uncollected Waste and Recycling
PQ15	Emma Swain	Blenheim Court
PQ16	Sally Kent	Special School Places
PQ17	Caroline Gooch	St Christopher's School
PQ18	Mubashar Chaudhry	City Hall Lights
PQ19	Jack Whittaker	Pitches for Traders in Bristol Docks and Parks
PQ20	Mike Oldreive	Value and Ethics Sub-Committee
PQ21	David Redgewell	Transport Levy
PQ22	Jen Smith	Homechoice / Housing Associations
PQ23	Danica Priest	Development Control
PQ24	Danica Priest	Committee Model
PQ25	Dan Ackroyd	Value and Ethics Sub-Committee
PQ26	Dan Ackroyd	Barton House
PQ27	Leona Dennehy	Pitches for Traders in Bristol Docks and Parks
PQ28	Shaban Ali	Barton House
PQ29	Laura Stone	Barton House
PQ30	Andy Watt	Barton House
PQ31	Cam Hayward	Daventry Road School
PQ32	Cam Hayward	Redcatch Park Tennis Courts
PQ33	Nuh Sharif	Barton House



PQ34	Jez Olpin	Tender Submissions
PQ35	Becky Watkins	Pitches for Traders in Bristol Docks and Parks
PQ36	TRESA CIC	Totterdown Bridge Tower Block

Within the time available, the Mayor responded verbally to questions PQ01, 02, 03, 04 and 05 also responding to supplementary questions.

7 Petitions Notified by Councillors

The Full Council received and noted the following petitions:

Ref No	Name	Title	Number of signatures
CP01	Cllr Hopkins and Davies	Investment in Redcatch Park	477

8 Petition Debate: Israel - Gaza Conflict

The Full Council considered a report of the Director – Legal and Democratic Services setting out details of a petition ‘Israel – Gaza Conflict’. The petition had reached the 3,500 signature threshold to qualify for a Full Council debate.

Councillor Zoe Goodman, the petition organiser, was invited by the Lord Mayor to present the objectives of the petition.

The Full Council debated the petition.

Following the debate it was:

RESOLVED: That the petition and the comments from the debate be noted and referred to the Mayor for response.

9 Youth Council Update Report

This item was deferred.

10 Council Tax Base 2024/25

Full Council considered a report on the Council Tax Base 2024/25.

Councillor Craig Cheney moved the reports for item 10 and item 11.



11 Collection Fund Surplus / Deficit 2023/24

Full Council considered a report on the Collection Fund Surplus / Deficit 2023/24.

Following debate for items 10 and 11, there were two votes, and it was:

RESOLVED (63 For, 0 Against, 0 Abstentions):

That Full Council agreed:

In accordance with the Local Authorities (Calculation of Council Tax Base) (England) Regulations 2012, the amount calculated by Bristol City Council as its Council Tax base for the financial year 2024/25 shall be 134,752.

RESOLVED (61 For, 0 Against, 0 Abstentions):

That Full Council agreed:

- 1. That an estimated surplus as at 31 March 2024 on the Council Tax element of the Collection Fund of £0.835m be declared for 2023/24 and shared between this Council, the Police and Crime Commissioner for Avon and Somerset and the Avon Fire and Rescue Service in proportion to their 2023/24 precepts on the Collection Fund.**
- 2. That an estimated deficit as at 31 March 2024 on the Non-Domestic Rates (NDR) element of the Collection Fund, net of grants, of £4.545m be declared for 2023/24 and shared between this Council, Avon Fire and Rescue Service and the West of England Combined Authority (WECA) in proportion to the appropriate year demands (Bristol 95%, WECA 4%, Avon Fire and Rescue Service 1%).**

12 Flax Bourton Mortuary Bylaw

Full Council considered a report on the Flax Bourton Mortuary Bylaw.

Councillor Craig Cheney moved the report and Councillor Tim Rippington seconded the report.

There was no debate, and it was:

RESOLVED: That Full Council passed a bylaw enabling the council to commence charging for storing of deceased people at Flax Bourton Mortuary where the funeral director delays collection.

13 Members Allowance Scheme



Full Council considered a report on the Members Allowance Scheme.

The Lord Mayor moved the report and Councillor Paula O'Rourke seconded the report.

There was no debate, and it was:

RESOLVED: That Full Council adopted the Members' Allowances Scheme for publication within the Constitution.

14 Local Government Ombudsman Decisions

Full Council considered a report on Local Government Ombudsmen Decisions.

The Lord Mayor moved the report.

Following debate, it was:

RESOLVED: That Full Council noted the report.

15 Audit Committee Half Year Report

Full Council considered the Audit Committee Half-Year Report.

Councillor Andrew Brown moved the report as Chair of the Audit Committee.

Following debate, it was:

RESOLVED: That Full Council noted the report.

16 Constitution for the Committee Model

Full Council considered a report on the Constitution for the Committee Model.

Councillor David Wilcox moved the report and Councillor Andrew Brown seconded the report.

Following debate there was a vote, and it was:

RESOLVED: (61 For, 0 Against, 1 Abstention) That Full Council adopted the Constitution for the Committee Model of governance which will come into effect on 6 May 2024.

17 Motions



Following a short adjournment, it was then moved by the Lord Mayor that standing order CPR2.1(xi) be suspended to allow the meeting to go past the 30 minutes time limit for motions. Following a vote, it was agreed to proceed up until 6.00pm.

GOLDEN MOTION (GREEN PARTY): MAXIMISING THE SUPPLY OF HOUSING FROM EXISTING BUILDINGS AND COUNCIL LAND

Councillor Tony Dyer moved the following motion:

Full Council notes that:

1. UK Government data released in March 2023 identified 1.2m families on housing waiting lists across England [1] Meanwhile the costs of providing temporary accommodation have increased by 62% in the last five years to £1.7bn. [2]
2. UK Government data released in October 2022 shows that over one million homes were classed as unoccupied in England, with over 300,000 of those reported as being long-term empty - vacant for six months or longer. [3]
3. Savills have identified that there is an oversupply of retail space nationally of approximately 150 million square feet. With the average UK flat being 625 square feet, this is enough floor space to provide up to 240,000 average size flats (including 96,000 in long term empty retail space). They forecast that the level of excess retail space will double by 2030 as the retail economy continues to evolve. While some vacant space may be valuable to diversify local centres and high streets with new uses, much could offer housing opportunities.
4. It is common for commercial letting agents to inflate quoted prices of empty properties beyond the rateable value, and/or gatekeep interested businesses from making offers, resulting in properties being empty for longer periods. This also results in areas not having the retail offering required to support sustainable communities.
5. In Bristol there are around 21,000 families are on the housing waitlist and the cost of providing temporary accommodation remains a significant budget pressure. Shelter have recently estimated that on any given night in Bristol in 2023 there are approximately 3,224 people in some form of homelessness, the overwhelming majority of whom are in temporary accommodation. This is an increase of 639 compared to 2022. [4]
6. In Bristol, between 2022/23, almost 400 council homes were empty at any one time, whilst some 400 private sector homes were brought back into occupation over the same period. [5] Live table 615 on vacant Local Authority dwelling stock- maintained by central government - show that on 3rd October 2023, 5,251 mostly privately owned dwellings in Bristol were shown as vacant, of which 1,881 were classified as long term vacant. [6]



7. In Bristol, Savills have identified some 185,000 square feet of long-term retail voids (over half of which have been vacant for over three years) – equivalent to almost 300 average size flats. Cost pressures to retrofit existing retail space, coupled with increasing use of online retail, may well see additional floorspace become available for residential use. At present over 90% of Bristol City Centre retail stock is EPC rating C or worse – with cost estimates of up to £220m to reach EPC rating A as retail. As a result, many of these retail spaces may no longer be viable. Similarly, there is a general over supply of office space.

8. In Bristol in 2021 there were around 13,500 homes with planning permission – with around 3,000 under construction and some still due to begin construction or subject to s.106. This still leaves thousands of homes that are failing to be delivered, in many cases due to viability issues. [7]

9. Bristol City Council owns or controls considerable assets including buildings, land and property amounting to over one million square metres of floorspace and over 3,600 hectares of land. Within this portfolio, that is essentially held in stewardship by Bristol City Council on behalf of the citizens of Bristol, brownfield sites that could be redeveloped should be subject to the highest levels of social value and social housing delivery.

10. An estimated 278,000 homes nationwide could be delivered via Community Land Trusts, directly involving and empowering local communities in the delivery of housing that meets their needs. 80% of these homes would be additional – they would not be built without Community Land Trusts. [8]

Full Council believes that:

1. The recently submitted Local Plan focuses on sites for the delivery of new homes. But, to reduce pressure on communities and valued green space, there is a clear need to identify the potential to bring existing empty homes into use, to convert and reuse existing buildings, and to ensure homes already with planning permission are being delivered.

2. It needs to develop its understanding, approach and prioritisation of the wider definitions surrounding empty homes, free from the boundaries that council tax definitions currently provide. Second homes for example, may be a crucial area of focus.

3. In Bristol, a combination of potential sources of new homes which is not just reliant on new planning permission is required in order to make the most efficient and effective use of the limited land the city has available.

4. There needs to be a clear understanding of how council assets can be best utilised for the benefit of the city and its residents. This includes ensuring that council owned land and buildings are only developed with the highest levels of social value provision, with a commitment to provide social housing at policy compliant levels and above. Council assets should be used strategically to ensure communities are provided with the resources and facilities required to create sustainable communities.



5. The existing Empty Homes team has already performed well, being identified as an example of best practice by the Local Government Association.
6. Whilst additional enforcement measures will undoubtedly add to the available options for an authority when encouraging empty homeowners to return their properties to use, the vast majority of empty homes brought back into use will be down to the intervention, engagement and encouragement initiated by an Empty Home, or other relevant, officer. By increasing officer capacity within the team or by increasing headcount, greater exposure of the issue locally will also allow for sustained and targeted work, often required to see some of the most challenging cases successfully resolved.

Full Council Resolves to:

1. Request the mayor to consider with officers expanding the remit and responsibilities of the Empty Homes team, including looking to other examples of best practice, and benchmarking to councils where numbers of empty homes across all categories are similar.
2. Request the mayor to establish a Redundant Buildings Task Force alongside the Empty Homes team to work with Bristol retail and commercial offices providers and relevant organisations to bring forward opportunities to convert unviable retail and/or office floorspace into residential use where no longer suitable for their existing use. Long term empty retail units should be advertised in line with their rateable value to ascertain if they are truly unviable. Officers should explore the potential for retailers to part fund this task force and explore how empty units could be utilised for the benefit of the community, such as through use as a different usage classification as grocery retail, small business or creative use.
3. Request that the Mayor sets up a dedicated team to identify stalled sites with planning permission in order to increase the proportion of existing planning permissions being brought forward for delivery. This should include identifying additional sources of grant funding to ensure affordable homes continue to be delivered whilst recognising recent economic pressures in construction. The potential for part funding of this team by the development community should be considered.
4. Protect council owned land and assets as public owned assets, ensuring that when council owned land and assets are made available for redevelopment, this is done with a commitment to retaining council ownership wherever possible, and to provide the highest possible levels of social value and social housing delivery.
5. As and when council owned land and/or property is considered for potential development or disposal, those overseeing the process should consider if there is the potential to increase further the proportion of housing delivered via community led housing schemes – by involving communities in the provision of housing co-designed and/or co-delivered by the community including the potential transfer of long-term leaseholds on suitable council land to local communities.

The motion was seconded by Councillor Carla Denyer

Councillor Tom Renhard then moved the following amendment:



‘That the motion be amended to read as follows:

Full Council notes that:

1. UK Government data released in March 2023 identified 1.2m families on housing waiting lists across England [1] Meanwhile the costs of providing temporary accommodation have increased by 62% in the last five years to £1.7bn. [2]
2. UK Government data released in October 2022 shows that over one million homes were classed as unoccupied in England, with over 300,000 of those reported as being long-term empty - vacant for six months or longer. [3]
3. Savills have identified that there is an oversupply of retail space nationally of approximately 150 million square feet. With the average UK flat being 625 square feet, this is enough floor space to provide up to 240,000 average size flats (including 96,000 in long term empty retail space). They forecast that the level of excess retail space will double by 2030 as the retail economy continues to evolve. While some vacant space may be valuable to diversify local centres and high streets with new uses, much could offer housing opportunities.
4. It is common for commercial letting agents to inflate quoted prices of empty properties beyond the rateable value, and/or gatekeep interested businesses from making offers, resulting in properties being empty for longer periods. This also results in areas not having the retail offering required to support sustainable communities.
5. In Bristol there are around 21,000 households on the housing waitlist and the cost of providing temporary accommodation remains a significant budget pressure. Shelter have recently estimated that on any given night in Bristol in 2023 there are approximately 3,224 people in some form of homelessness, the overwhelming majority of whom are in temporary accommodation. This is an increase of 639 compared to 2022. [4]
6. In Bristol, between 2022/23, approximately 300 - 350 council homes were empty at any one time, with over 800 brought back into use during this period.
7. Some 400 private sector homes were brought back into occupation over the same period by the Council’s Empty Homes Unit. [5] Live table 615 on vacant Local Authority dwelling stock- maintained by central government - show that on 3rd October 2023, 5,251 mostly privately owned dwellings in Bristol were shown as vacant, of which 1,881 were classified as long term vacant. [6]
8. There are currently 2,556 properties in use as AirBnB’s in the city. Of these, 1,722 are wholly rented out. Both Scotland and Northern Ireland have brought in registration schemes to manage the number of AirBnB’s and other short term / holiday lets, whilst England is yet to do so. [7]
9. There are significant challenges brought about through ‘second homes’.



10. In Bristol, Savills have identified some 185,000 square feet of long-term retail voids (over half of which have been vacant for over three years) – equivalent to almost 300 average size flats. Cost pressures to retrofit existing retail space, coupled with increasing use of online retail, may well see additional floorspace become available for residential use. At present over 90% of Bristol City Centre retail stock is EPC rating C or worse – with cost estimates of up to £220m to reach EPC rating A as retail. As a result, many of these retail spaces may no longer be viable. Similarly, there is a general over supply of office space.
11. In Bristol in 2021 there were around 13,500 homes with planning permission – with around 3,000 under construction and some still due to begin construction or subject to s.106. This still leaves thousands of homes that are failing to be delivered, in many cases due to viability issues. [8]
12. Bristol City Council owns or controls considerable assets including buildings, land and property amounting to over one million square metres of floorspace and over 3,600 hectares of land. Many of these assets in areas defined as ‘areas of growth and regeneration’. Within this portfolio, that is essentially held in stewardship by Bristol City Council on behalf of the citizens of Bristol, brownfield sites that could be redeveloped should be subject to the highest levels of social value and social housing delivery. These assets are currently overseen through the Estates Strategy Board.
13. The work of Goram Homes, Bristol’s council-owned housing company, in bringing sites forward that that will see higher levels of social housing delivered with a focus on council homes, with a planned pipeline of over 3,000 homes. On One Lockleaze, over 55% of the homes will be council owned social rented homes and shared ownership.
14. The acceleration of council-owned homes being brought forward in the city. Council-owned homes built or acquired in the city maximise the ability of the Council to address housing pressures and improve the quality of life for residents. This includes the financial benefits through working to reduce temporary accommodation pressures as part of this.
15. That since 2016, the Labour administration has overseen the delivery of over 12,500 new homes, including over 2,000 affordable homes. In 2021-22, this saw 2,563 homes built including 474 affordable homes, the most in over a decade in a single year.
16. The work of the Labour administration to drive forward more innovative community-led housing in the city. This has included a project by We Can Make receiving national coverage through effective use of council-owned land to provide homes for people on the housing waiting list. An estimated 278,000 homes nationwide could be delivered via Community Land Trusts, directly involving and empowering local communities in the delivery of housing that meets their needs. 80% of these homes would be additional – they would not be built without Community Land Trusts. [9]
17. The work of the Labour administration to make more effective use of underutilised car parks in the city to provide homes. The award-winning Hope Rise scheme, supporting young people at risk of



homelessness is one example of this. The recently opened scheme at Derby Street car park will also provide move on accommodation for those at risk of rough sleeping.

Full Council believes that:

1. The recently submitted Local Plan focuses on sites for the delivery of new homes. But, to reduce pressure on communities and valued green space, there is a clear need to identify the potential to bring existing empty homes into use, to convert and reuse existing buildings, and to ensure homes already with planning permission are being delivered.
2. Further powers and resources are needed from central government to develop the approach to addressing empty homes on an increased scale in the private sector. This would have economic benefits with increased numbers of properties brought back into use.
3. Council assets should be used strategically to ensure communities are provided with the resources and facilities required to create sustainable communities. This includes ensuring there is sufficient infrastructure in place or being developed to support increased populations in parts of the city.
4. In Bristol, a combination of potential sources of new homes which is not just reliant on new planning permission is required in order to make the most efficient and effective use of the limited land the city has available.
5. Building new homes will remain the primary driver of addressing the housing crisis. We must remain steadfastly committed to this aim.
6. There needs to be a clear understanding of how council assets can be best utilised for the benefit of the city and its residents. This includes ensuring that council owned land and buildings are only developed with the highest levels of social value provision, with a commitment to provide social housing at policy compliant levels and above. Where a developer partner is unable to achieve policy compliant levels of affordable housing, alternative options should be pursued, including through consideration of Goram Homes.
7. The existing council-owned commercial estate delivers significant revenue that is invested to the provision of council services.
8. Goram Homes is well placed to play a key role in addressing the housing crisis and utilise existing buildings and council land to do so.
9. That the primary way to address the housing crisis is by building more homes, focusing in on maximising council-owned homes and social housing wherever possible. Council housing should be the priority on council owned land, including from schemes being built by the Council's own housing company, Goram Homes.



10. Not all assets will be suitable for conversion into housing, with known issues nationally and locally with some office block conversions that have taken place under permitted development rights.
11. The existing Empty Homes team has already performed well, being identified as an example of best practice by the Local Government Association. [10]
12. Additional enforcement measures will undoubtedly add to the available options for an authority when encouraging empty homeowners to return their properties to use. Increasing the number of empty homes brought back into use will be down to the intervention, engagement and encouragement initiated by an Empty Home, or other relevant, officer. By increasing officer capacity within the team or by increasing headcount, greater exposure of the issue locally will also allow for sustained and targeted work, often required to see some of the most challenging cases successfully resolved.
13. That more powers are needed to be devolved to address the issues brought by the rise of AirBnB's and Second Homes.
14. In the importance of continuing to invest in community led housing in the city.

Full Council Resolves to:

1. Recognise the work being done to tackle empty properties in the city and request the mayor to consider with officers expanding the remit and responsibilities of the Empty Homes team. This should include looking to other examples of best practice, and benchmarking to councils where numbers of empty homes across all categories are similar.
2. Request the mayor to work with the existing Estates Strategy Board alongside the Empty Homes team to work with Bristol retail and commercial offices providers and relevant organisations to bring forward opportunities to convert unviable retail and/or office floorspace into residential use where no longer suitable for their existing use. Long term empty retail units should be advertised in line with their rateable value to ascertain if they are truly unviable. Officers should explore the potential for retailers to part fund this task force and explore how empty units could be utilised for the benefit of the community, such as through use as a different usage classification as grocery retail, small business or creative use.
3. To lobby central government for additional resources to establish a Redundant Buildings Task Force via the Estates Strategy Board, to maximise opportunities in the city for small businesses and where sites are not commercially viable, pursue options for bring forward for housebuilding.
4. Request that the Mayor works with the existing planning team to identify stalled sites with planning permission in order to increase the proportion of existing planning permissions being brought forward for delivery. This should include identifying additional sources of grant funding to ensure affordable homes continue to be delivered whilst recognising recent economic pressures in construction. The potential for part funding of this team by the development community should be considered.



5. Protect council owned land and assets as public owned assets, ensuring that when council owned land and assets are made available for redevelopment, this is done with a commitment to retaining council ownership wherever possible, and to provide the highest possible levels of social value and social housing delivery.
6. To prioritise the council owned housing company, Goram Homes, in bringing forward homes on council owned land in the city. To agree that the existing proposed pipeline of sites for Goram Homes should continue to come forward with our council owned housing company, going through the appropriate planning process as part of this.
7. To withdraw from partnerships with private developers on council-owned land where those developers are failing to deliver / propose policy compliant levels of affordable housing.
8. Prioritise delivery of council housing in the city on council-owned land, through building homes and acquiring additional homes for the HRA to increase stock and help address the waiting list.
9. As and when council owned land and/or property is considered for potential development or disposal, those overseeing the process should consider if there is the potential to increase further the proportion of housing delivered via community led housing schemes – by involving communities in the provision of housing co-designed and/or co-delivered by the community including the potential transfer of long-term leaseholds on suitable council land to local communities.
10. Subject to the appropriate powers being devolved, back further measures to address the issues of second homes and short-term lets in the city, including through registration and/or licensing schemes.
11. Explore bringing forward more car parks for the provision of homes to help address the housing crisis the city faces, building on the examples of Hope Rise and Derby Street.

The amendment was seconded by Councillor Katja Hornchen.

Following debate, upon being put to the vote, the amendment was CARRIED (60 For, 0 Against, 4 Abstentions).

The Lord Mayor then invited Councillor Dyer, as mover of the original motion to speak.

Following final remarks, upon being put to the vote, the motion as amended was CARRIED (63 For, 0 against, 1 abstentions) and it was

RESOLVED:

Full Council notes that:



1. UK Government data released in March 2023 identified 1.2m families on housing waiting lists across England [1] Meanwhile the costs of providing temporary accommodation have increased by 62% in the last five years to £1.7bn. [2]
2. UK Government data released in October 2022 shows that over one million homes were classed as unoccupied in England, with over 300,000 of those reported as being long-term empty - vacant for six months or longer. [3]
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4. It is common for commercial letting agents to inflate quoted prices of empty properties beyond the rateable value, and/or gatekeep interested businesses from making offers, resulting in properties being empty for longer periods. This also results in areas not having the retail offering required to support sustainable communities.
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Full Council Resolves to:

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11. Explore bringing forward more car parks for the provision of homes to help address the housing crisis the city faces, building on the examples of Hope Rise and Derby Street.

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SILVER MOTION (LIBERAL DEMOCRATS): OPEN OUR LIBRARIES

Councillor Tim Kent moved the following altered motion:

Bristol City Council is proud that it has protected libraries from closure and notes that in many parts of the country many libraries have been lost.

Council is pleased that previous closure plans were scrapped and strongly supports retaining the branch library network as a free, affordable, warm, and safe space where people can access knowledge.

Council notes and supports the previous work on welcome spaces in the city - and notes that for many that is their local branch library.



Council is very concerned that the recruitment freeze, enacted by officers following consultation with Labour Cabinet Members, has created a stealth closure of branch libraries with many now being forced to close once or twice a week.

Council calls on the Mayor's administration to instruct officers to immediately end the recruitment freeze for the library service and ensure they have the staff available to ensure branch libraries remain open.

Councillor Sarah Classick seconded the motion.

Following debate, upon being put to the vote, the motion was CARRIED (62 For, 0 against, 0 abstentions) it was:

RESOLVED:

Bristol City Council is proud that it has protected libraries from closure and notes that in many parts of the country many libraries have been lost.

Council is pleased that previous closure plans were scrapped and strongly supports retaining the branch library network as a free, affordable, warm, and safe space where people can access knowledge.

Council notes and supports the previous work on welcome spaces in the city - and notes that for many that is their local branch library.

Council is very concerned that the recruitment freeze, enacted by officers following consultation with Labour Cabinet Members, has created a stealth closure of branch libraries with many now being forced to close once or twice a week.

Council calls on the Mayor's administration to instruct officers to immediately end the recruitment freeze for the library service and ensure they have the staff available to ensure branch libraries remain open.

Meeting ended at 6.00 pm

CHAIR _____



Full Council

February 2024



Report of:	Denise Murray, Director Finance (Chief Finance Officer & S151 Officer)
Title:	2024/25 Budget Report
Ward:	City Wide
Member Presenting Report:	The Mayor and the Deputy Mayor / Cabinet Member for Finance, Governance and Performance

Recommendation

For Council to consider and approve the Mayor’s 2024/25 Budget recommendations which include the various elements of the Revenue budget, Capital programme, Council Tax and Adult Social Care Precept for 2024/25.

All separate but associated budget reports (DSG, HRA) were previously aligned into the main report, and as such the only amendment to the suite of reports is the DSG Equalities Impact Assessment.

To note under the delegated authority to the Director Finance, after consultation with Deputy Mayor with responsibility for Finance, Governance and Performance and the Mayor, the following changes have been made to the budget report since approved by Cabinet on 23 January 2024:

1. The following government funding information received relating to 2024/25:

Public Health Grant - The final allocation of Public Health grant for 2024/25, was announced 5 February 2024, and for Bristol is £36.4 million (1.6% cash increase on 2023/24). Further details can be found in Section 10 of the main report.

Additional Funding Announcement 24 January 2024 - Announcement of £600 million (£4.2m allocation for Bristol) one-off funding for 2024-25 only, primarily allocated to support authorities with social care responsibilities, giving an increase in the funding guarantee so that all local authorities will see a minimum 4% in their core spending power, before taking any local decisions on raising council tax. The announcement also refers to the Rural Services Delivery Grant, supports councils with extreme Internal Drainage Board Levies, gives an increase in funding to the Isle of Wight and Isles of Scilly with residual allocated to Services Grant.



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Conditionality is applicable to the new funding announcement and local authorities will be expected to produce productivity plans which will set out how they will improve service performance and ensure every area is making best use of taxpayers' money.

The final Local Government Finance Settlement – published 5 February 2024, confirms the Bristol allocations including any additional funding post the provisional settlement. As a result, a number of revisions have been made to the budget report and where appropriate realignment of funding to address emerging pressures (such as Temporary Accommodation, Local Crisis Prevention Fund and the potential ASC equal pay review requirements). The following sections of the report have been amended to reflect the above:

Budget Report

- Table 1: General Fund Summary
- Table 3: Summary of Proposed General Fund Revenue Budget
- Figure 1: Breakdown of budget income 2024/25
- Table 4: Breakdown of baseline expenditure pressures and investments
- Table 6: Breakdown of baseline expenditure pressures and investments – Children & Families
- Table 8: Breakdown of baseline expenditure pressures and investments - Growth & Regeneration
- Table 9: Breakdown of baseline expenditure pressures and investments – Resources
- Table 31: General Fund assumptions as % of net budget and turnover days
- Figure 11: Funding gap analysis
- Appendix 1: Detailed budget summary by directorate
- Appendix 10: Service & corporate pressures
- Associated paragraphs have been updated to include reference to the new funding: 4.11; 5.17; 6.31; 6.34; 6.38; 6.43; 6.45.

2. The following government funding information received relating to 2023/24:

The final local government settlement outlined detail of two business rates grants figures for the current financial year (green plant and machinery exemption compensation and £100 million one-off from surplus Levy Payments). These are detailed in para 5.3.





3. The following additional information received or required as standard to complete the report:

- a) Appendix 11: Precept notification received from the Police and Crime Commissioner for Avon and Somerset and draft precept from Avon Fire Authority, to inform the Statutory Calculations in respect of Bristol's Council Tax.
- b) The National Joint Council (NJC) proposed 2024/25 pay claim for members in local government and schools to be submitted by the unions (GMB, UNISON and Unite) to the National Employers, is outlined in Section 17.31.

4. Other adjustments relate to minor formatting or transposition errors in previous report or to aid transparency, as follows:

- Table 24: merger of two tables expanded to incorporate Invest to Save and total investments.
- Table 28: wrong version incorporated displaying incorrect capital contingency – revised.
- Table 10: Corporate pressures and associated paragraphs – added to provide additional clarity on total budgetary pressures with the addition of delegations to CLB for the alignment of the corporate transformation funding, including para 6.47.
- Appendix 1: Detailed Budget Summary by Directorate - savings (2324R9 and 2324R12) revised to align with Delivery Executive decision.
- Appendix 4: Treasury Management Strategy, para 4.16: inclusion of Community Municipal Investments or Retail Bonds for Zero Carbon Initiatives as a source of funding.
- Appendix 4: Treasury Management Strategy, Table 5: value of other long-term liabilities corrected to the correct financial period.
- Appendix 4: Treasury Management Strategy, Annual Investment Strategy, paragraph 6 includes reference to Equitable Investment Policy & paragraph 7 additional narrative added in relation to performance.
- Appendix 9: Long Term Investments/Shareholdings - paragraph 4.1 corrected to reflect the units of housing and 'affordable' housing figures published on Goram Home's website and paragraph 4.5 updated to reflect an additional draw down from the working capital loan facility since the Cabinet report was published.
- Any other minor formatting updates.



Budget Report

2024 - 2025

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1. Mayor's Budget Recommendations to Council

The approval of the Mayor's budget proposals to Council in respect of 2024/25 as set out in this report, subject to any agreed amendments:

To note:

- a) The report from Overview and Scrutiny Management Board (OSMB) and/or the Resources Scrutiny Commission that will be published separately.
- b) The budget consultation process that was followed and feedback as outlined in Section 18 and Appendix 6.
- c) The categorisation of earmarked reserves and provisions set out in Section 15.
- d) That the budget consultation feedback and equality impact assessments have been taken into consideration and have informed the final budget proposals.
- e) The feedback provided by Bristol Schools Forum for Cabinet and Council, for consideration in making final decisions on the Dedicated Schools Budget for 2024/25 as set out in Appendix 14.
- f) The Section 25 Statement of the Chief Finance Officer (s151 Officer) on the robustness of the budget and adequacy of reserves as set out in Section 17.

To agree:

- g) Subject to (h) below, the Bristol City Council levels of Council Tax increase of 4.99%; which includes 2% precept to support Adult Social Care, noting the precepts of the Police and Crime Commissioner for Avon and Somerset and the Avon Fire Authority.
- h) In relation to determination of Council Tax, in the event that Avon Fire Authority has not set its precept by 20 February, Full Council agrees to constitute a subcommittee of the Council, with membership to be agreed, and to delegate authority to the committee to note the precept subsequently set by Avon Fire Authority and approve the calculations for determining the Council Tax requirement for the year 2024/25 (the levels of council tax as set out in recommendation g) to be outlined in an updated Appendix 11 and in accordance with the Local Government Finance Act 1992.
- i) The Council's General Fund net revenue budget for the year 2024/25 as £530.1 million and expenditure allocations as set out in Appendix 1; subject to any budget amendments properly notified to and approved by the council in line with the Constitution.
- j) That supplementary estimates be approved as part of the Budget 2024/25 Report in the case that they are required to meet Q3/P8 2023/24 full year forecast spending requirements (see Appendix 15)
- k) The council's capital budget and programme for the years 2024/25 – 2033/34, totalling £2.7 billion for the General Fund and Housing Revenue Account.
- l) The strategic Community Infrastructure Levy allocations in section 13 (Table 28) are approved.
- m) The proposed Treasury Management Strategy for 2024/25 in Appendix 4, incorporating the Minimum Revenue Provision policy and the prudential indicators and limits.
- n) To approve the Strategy for the Flexible use of Capital Receipts as set out in Appendix 5.
- o) To approve the changes to Council Tax for empty homes (long term empty dwellings that are substantially unfurnished) and for second homes (dwellings that are occupied only periodically and are substantially furnished) in Appendix 12 be applied

from 1 April 2024, or as soon as possible thereafter, subject to the required legislation being in place.

To agree:

- p) The distribution of the 2024/25 Dedicated Schools Grant of £491.7 million as recommended by Cabinet and the Schools Forum, summarised below, and set out in Section 9.
 - i. The Schools Block budget set at £342.6 million, after transferring £1.7 million of the overall Schools Block to the High Needs Block as a contribution to the accumulated High Needs deficit.
 - ii. The Growth Fund for established schools expanding in September 2024 be set at £2.0 million (a component of the total Schools Block budget).
 - iii. The basis for distributing the funding to mainstream schools as set out and agreed by Schools Forum
 - iv. The High Needs Block budget be set at £91.3 million, after receiving transfers of £1.7 million from Schools Block.
 - v. The Early Years Block budget be set at £55.2 million and distributed in line with the arrangements agreed with the Schools' Forum, noting that spend and income will fluctuate, according to participation levels in each of the three school terms.

To agree:

- q) With regards to the Housing Revenue Account (HRA)
 - i. The HRA Revenue budget of £151.0 million for 2024/25 as set out in Section 11.
 - ii. A rent increase of 7.7% with effect from April 2024, applicable to HRA dwelling and non-dwelling rent.
 - iii. Note the refreshed HRA 30-year outline business plan and finance model established within the affordability principles in the capital strategy, and that this will be subject to annual review and in-depth review on a rolling 5-year basis, summarised in Section 11.

To delegate authority:

- r) To the Director of Finance after consultation with Designated Deputy Mayor with responsibility for Finance, Governance and Performance and the Mayor, to make any necessary technical adjustments that may be required to the budget with transfers to and or from reserves as appropriate.
- s) To the Corporate Leadership Board to align the transformation funding of £6.1 million to the agreed transformation programmes across the council to enable the delivery of agreed benefits and improved outcomes.
- t) To the Executive Director of Growth and Regeneration, in consultation with the Designated Deputy Mayor with responsibility for Finance, Governance and Performance, to set HRA service charges in line with the anticipated and actual cost of running each service.
- u) To Cabinet to approve (subject to consultation where required) any further DSG mitigation proposals for commencement in 2024/25.

2. List of Appendices

This report should be read alongside a series of appendices:

- Appendix 1: Detailed Budget Summary by Directorate & Division with Savings & Investments
- Appendix 2: Capital Programme 2024/25 – 2033/34
- Appendix 3: Budget Risk Matrix
- Appendix 4: Treasury Management Strategy
- Appendix 5: Flexible Use of Capital Receipts Strategy
- Appendix 6: Budget Consultation Report
- Appendix 7: Equalities Impact Assessments: Cumulative & Service
- Appendix 8: Budget Savings and Efficiencies
- Appendix 9: Long Term Investments & Shareholdings
- Appendix 10: Service and Corporate pressures
- Appendix 11: Statutory Calculations in Respect of Council Tax
- Appendix 12: Changes to Council Tax
- Appendix 13: Service Investments, Loans and Guarantees
- Appendix 14: Bristol Schools Forum Feedback
- Appendix 15: Children & Education Supplementary Estimate Request

3. Executive Summary

- 3.1 The council has a legal responsibility to set an annual balanced budget (Local Government Finance Act 1992). Budgets are a distillation of what defines a council and a demonstration in pounds and pence of its priorities and its values as stated in the Corporate Strategy. It outlines how the financial resources are to be allocated and utilised, showing the council's financial plan for the coming year with regard to statutory services as well as local key priorities and objectives.
- 3.2 There is no doubt that this remains a challenging time for Local Government, due to the volatility of the economy and inflation. Nationally there has also been high levels of demand for social care, home to school transport and large increase in homelessness, all of which have reflected locally in Bristol, and are putting pressure on our in-year and future year budgets. We continue to work extremely hard to manage this situation and mitigate the adverse impact. Due to careful and detailed planning and prudent management of our finances we are able to set a balanced budget over the five-year planning period.
- 3.3 This is a budget which seeks to prioritise what really matters, supporting people through the cost-of-living crisis, investing in our frontline public services, and providing the resources available to protect the most vulnerable. But it does so in a context of financial constraints from underlying structure pressures including local supply challenges, labour shortages, pay inflation and the ambition to respond proactively to the climate emergency.
- 3.4 There has been a marginal improvement in terms of Local Government funding in the most recent years and outlined in the Autumn Statement 2023 and subsequent allocation in the provisional Local Government finance settlement. However, these have not kept pace with demand for our services and the set of sustained economic and financial challenges related to national and local market conditions to which local government has and continues to be exposed.

- 3.5 We are committed to continuing to deliver on our Corporate Strategy 2022 to 2027 [Corporate Strategy 2022-27](#), Our budget will include the ongoing transformation and delivery of services that are important to our citizens, complemented by additional investment in decarbonising our estate and our existing and a programme of new housing developments infrastructure.

General Fund

- 3.6 In 2023/24, the council set a three-year budget, balanced through the utilisation of the resilience / smoothing reserve, which enabled us to take a longer-term and more strategic view whilst further developing our transformation proposals to support our decision. The prior year's budget outlined savings of £43.9 million between 2023/24 and 2027/28, with £17.7 million to be found in the later years from 2024/25 and beyond.
- 3.7 The Capital Strategy and Medium-Term Financial Plan (MTFP) agreed by Council in October 2023 estimated a funding gap of £17.8 million for the financial year 2024/25 which was predicted to rise to a peak of £32.1 million over the course of the five-year planning period. The funding gap, given the continued back-drop of the cost of living and demand pressures, continues to be extremely sensitive to inflation and core funding variations, and by 2028/29 the breadth of the potential sensitivity variation ranged from £4.7 million to £81.2 million.
- 3.8 In addressing these challenges, the MTFP sets out our guiding financial principles and good practice arrangements for; delivering sustainable services, to be resilient to future uncertainty, deliver best value and a balanced budget in the medium term. Overall, this report recommends a 2024/25 general fund net expenditure budget of £530.1 million, (a net increase of £46.5 million from the 2023/24 budget) and incorporates targeted revenue investment in priority areas of £55.8 million in 2024/25 to mitigate ongoing and unavoidable pressures.
- 3.9 The outlook for the coming years is volatile, with a number of impacting factors influencing the planning assumptions across the medium and longer term, not least of which is the continued lack of funding certainty. The Autumn Statement paved the way for an expectation of real terms cuts over the coming medium term. These, combined with the impacts from the fair funding review for the allocation of government funding and the reset of business rates retention to redistribute growth due in 2026/27, are presenting significant challenge to the sector.
- 3.10 In order to ensure that the council manages costs within the available funding over the medium term, savings continue to be an essential requirement. In addition to the net £10.0 million savings approved as part of prior year's budgets for 2024/25, further savings are proposed to the value of £24.0 million in 2024/25. This results in an overarching savings and efficiency programme of £34.0 million. These savings are underpinned by an overarching savings contingency of £1.5 million (of which £1.0m relates to 2024/25) and £4.8 million linked to the savings outlined in this recommendation (of which £3.0m relates to 2024/25). Whilst delivering a balanced budget across the five year period of the plan, the refreshed scenarios indicate that under the worst case a variation of £14.0 million in 2024/25 to £57.0 million by 2028/29 could occur (see section 17.42 for more detail).

- 3.11 Savings delivery has become a normalised process throughout the last decade, since the introduction of austerity measures from 2010. The council has during that time delivered substantial and wide-ranging efficiencies, savings and transformation to manage the ever-tightening financial landscape which it faces. The historic service reductions and efficiencies have seen services outside of social care having to manage significant reductions, with over 50% real terms cuts in those areas. This leaves the council in a difficult position with limited options on further reductions and in the last financial year a clear focus has been put on transformation and delivering quality services differently to enable value for money.
- 3.12 In achieving the reported position of £530.1 million for 2024/25 the council has been compelled to take painful and difficult decisions in order to prioritise funding in the areas which have the greatest impact on the quality of life for the people of Bristol and deploying all the levers available to us to deliver on our values, protecting people, and optimising services. In living within our means, we have had to use the council tax flexibilities available to us, taking into consideration the pressures many households are facing with an increased cost of living. It is necessary to levy a Social Care Precept of 2%, as a contribution towards the pressures the city faces in addressing adult social care demands, and in addition increasing the core council tax base by 2.99% to support the underlying position including inflationary pressures. The two combined uplifts equate to an overall 2024/25 council tax increase of 4.99%, generating an additional £13.5 million resources from council tax for services provided by the council.
- 3.13 We have sought to protect the most vulnerable and continue to be one of a few authorities who are retaining the Local Council Tax Reduction scheme, which will mean 32,200 households on low income will be protected from the increase and receive up to 100% deduction of their council tax costs. This is also true for pensioners.
- 3.14 The table below provides a high-level summary of the position including the transfers that will be required to create the necessary earmarked and general reserves for 2024/25 and 2025/26 and to ensure the councils ongoing sustainability and resilience in the later years when the most significant impact of the business rates reset comes to fruition and impacts on the level of core income.

Table 1: General Fund summary

General Fund Overview	24/25 £m	25/26 £m	26/27 £m	27/28 £m	28/29 £m
Original Budget (Approved by Council)	501.934	511.288	523.045	536.786	536.786
Total Emerging Pressures	48.561	28.973	32.166	35.805	48.027
Net Service Savings	(20.424)	1.450	(0.994)	(0.143)	0.878
Council Budget Requirement	530.071	541.711	554.217	572.448	585.691
Total Funding	(537.057)	(552.936)	(548.301)	(567.672)	(588.127)
Reserves (+/-)	6.986	11.226	(5.916)	(4.776)	2.436
Budget (Surplus)/Deficit	-	-	-	-	-

- 3.15 The council remains ambitious in its vision and objectives for the city and is committed in particular to ensuring that services to children, vulnerable adults and the provision of high value jobs continue to be key priorities. With alternative funds available to the council for capital expenditure on infrastructure (see section 13) the council is maintaining an ambitious approach to investing in the city.
- 3.16 The proposed Capital Programme amounts to £2.7192 billion (including HRA) in 2024/25. The programme was updated last year for several major programmes of works that helped the city ‘invest to grow’. Further steps toward the Regeneration of Bristol’s Temple Quarter were made, Bristol Beacon opened for business. This year the council is addressing the financial constraints in the programme that previously resulted in a lower proportion of our projects being funded by ‘investing to save’. Two ‘invest to save’ additions are Children’s Services projects which will aim to tackle the problems in the supply of Children’s Fostering Sufficiency and Children’s Homes Sufficiency placements.
- 3.17 Other invest to save proposals are coming forward. Not wanting to lose vital opportunities that result in savings, the capital programme will maintain an allocation of funding for use to explore, develop the early pipeline identified and subject to mandate, business case and cash flow appraisal be implemented subject to delegated approval. Projects for potential inclusion will be innovative small scale projects addressing placement sufficiency for adults with learning disability, temporary accommodation solutions, home to school transport vehicles, street lighting and other savings opportunities.
- 3.18 We are adhering to the priorities residents have helped us set, including creating 1000 affordable homes, preventing homelessness, promoting a healthier and happier city, tackling inequalities and creating vibrant neighbourhoods where people want to live – all while leading the drive towards becoming a net zero carbon city by 2030. We must also get the basics right – emptying bins, maintaining roads, leisure facilities and improving ways for walkers and cyclists to get around and protecting the most vulnerable. This approach will allow the council to ensure services are rightsized, can continue to deliver its key priorities, and plan appropriately for sustainable long term change.

- 3.19 The proposals above all form the basis of the council's final general fund revenue and capital budget for 2024/25.

Ringfenced accounts

Public Health

- 3.20 The Public Health Grant in Bristol is £35.9 million in 2023/24 and the allocation as announced 5 February 2024 for 2024/25 is £36.4 million (1.6% cash increase on 2023/24). This funding is used to meet statutory public health responsibilities and for 2024/25 includes additional funding to support local authority-led stop smoking services. Overall this represents a real terms reduction, with minimal additional funding to meet pay awards for public health consultant staff and those NHS staff employed on public health contracts.

Dedicated Schools Grant (DSG)

- 3.21 Following the October 2023 census, the DSG allocation was released by the ESFA on 19 December 2023. The overall DSG allocation for 2024/25 is £491.7 million.
- 3.22 The allocation of £491.7 million is an increase of £28.8 million on the equivalent 2023/24 allocation of £463.0 million. This increase includes a further £8.1 million for the Schools Block, where the majority of funding is passported directly to schools via the funding formula. The funding for the High Needs Block is £89.5 million, a 3.3% increase on 2023/24 (£86.6m).
- 3.23 The High Needs Block remains under pressure. Current spending levels in 2023/24 indicate that the increased allocation will not cover in-year forecast overspend and does not provide any additional funding for growth, additional need, or historic shortfalls.
- 3.24 The current trends indicate that the overall DSG cumulative unmitigated deficit is forecast to reach £56.1 million by the end of 2023/24.
- 3.25 A Statutory Instrument is in place to allow the overarching DSG deficits to be carried over in a negative reserve. This Instrument is, however, time-limited and was due to end in March 2023 but in recognition of the national challenge in relation to DSG deficits (attributed to High Needs) it has been extended for a further three years to March 2026. The extension is to allow councils the short-term flexibility needed to implement changes to move High Needs to a sustainable position.
- 3.26 Work, collaboration and engagement continues on mitigation proposals, with particular focus on sustainable school-led programmes, addressing the deficit in the High Needs Block through more inclusive mainstream provisions and improved collaboration and consultation with stakeholders.
- 3.27 In considering the DSG carry forward negative reserve, the current financial challenges for maintained schools and early years sector should also be noted. Local authority maintained schools are forecasting a net deficit for March 2024 when all the individual school balances are combined of £2.4 million. This is mitigated to a small surplus through additional one off funding earmarked to support schools in financial

difficulties (see section 9). The additional funding for schools and maintained nurseries in the funding formula from 2024/25 is welcomed and this along with the work underway to improve school's financial health will go some way in meeting these challenges and ensure a sustainable medium term position can be achieved.

Housing Revenue Account (HRA)

- 3.28 The HRA report presents the annual budget, Housing Investment Plan and 30-year HRA Business Plan model that, in addition to building new homes, will redevelop and regenerate and improve existing properties.
- 3.29 The annual 2024/25 budget is expected to be £151 million (an increase of £13.6 million from 2023/24) and includes a rent increase of 7.7% for 2024/2. The HRA business plan model is for a period of 30 years with gateway reviews. More focus is on the medium-term as there is more certainty on costs, demands, resources and pressures, which will enable the prioritisation of housing investment, which can be considered in the light of the Corporate Strategy and the impact of government policies on rents, disposals and regeneration. The HRA will play a significant role in the delivery of the Housing Programme and will work with the council's General Fund and the council's wholly owned housing company to ensure the aspiration of the housing plan is delivered.
- 3.30 The Business Plan model demonstrates that the annual budget and investment proposals are fundable, subject to the assumptions within the plan, and that the HRA remains sustainable and viable over the 30-year period.
- 3.31 In addition to the above, the council continues to progress the delivery of an ambitious HRA capital programme over the period from 2024/25 to 2033/34, which has a gross value of £2.3 billion and is fully funded using HRA revenue and reserves, external funding, capital receipts and prudential borrowing. As at 1st April 2024 the HRA earmarked revenue reserves are estimated to amount to £55.8 million.
- 3.32 The proposals above all form the basis of the council's final HRA revenue and capital budget for 2024/25.

Harbour Account

- 3.33 During 2024/25 it is expected, in line with a Cabinet decision taken during 2023/24, that a revision order will be taken to establish a separate ring-fenced account for the Harbour. This may require adjustments to the outlined budget following further work to understand the specific accounting treatments required. Recommendations will be brought forward through the appropriate decision pathway and delegated decision making route.

4. Council Strategy & Financial Planning

The One City Plan sets out an ambitious vision and actions for the future of Bristol to 2050. It is a collaborative approach to reach a shared vision for Bristol and aims to use the collective power of Bristol's key organisations to make a bigger impact, by supporting partners, organisations and citizens to help solve key challenges, such as driving economic growth for everyone.

- 4.1 The council's refreshed Corporate Strategy 2022 to 2027 remains the main strategic document and sets out the council's vision for Bristol, including the key priorities to be delivered over the medium term. It links with other key strategies and contributes to the delivery of the long-term One City Plan and shared vision for the city.
- 4.2 The Corporate Strategy lays the foundation for delivery of the vision and consists of 7 high level strategic themes:
- i. **Children and Young People** - City where every child belongs and every child gets the best start in life, whatever circumstances they were born in to.
 - ii. **Economy and Skills** - Economic growth that builds inclusive and resilient communities, decarbonises the city and offers equity of opportunity.
 - iii. **Environment and Sustainability** - Decarbonise the city, support the recovery of nature and lead a just transition to a low carbon future.
 - iv. **Health, Care and Wellbeing** - Tackling health inequalities to help people stay healthier and happier throughout their lives.
 - v. **Homes and Communities** - Healthy, resilient and inclusive neighbourhoods with fair access to decent, affordable homes.
 - vi. **Transport and Connectivity** - A more efficient, sustainable and inclusive connection of people to people, people to jobs and people to opportunity.
 - vii. **A Development Organisation** - From city government to city governance: creating a focussed council that empowers individuals, communities and partners to flourish and lead.
- 4.3 Our key commitments aligned to each theme, underpinned by 5 building blocks, and the values and behaviours that guide how the council will work can be viewed in the full document accessed via the link below:
[Corporate Strategy](#)
- 4.4 The economic and financial climate remains one of uncertainty with constrained funding streams and as such the approach to the meeting Corporate Strategy needs is to be considerate of budget pressures and funding availability. A phased approach to change has been adopted over the period of the strategy to ensure services are both positioned right, are sustainable and can plan appropriately for change.
- 4.5 The Policy and Budget Framework provides the structure and process for budget decision making and the Capital Strategy and MTFP are key financial planning document, covering a rolling period, refreshed annually. They set out the council's strategic approach to the management of its finances, both revenue and capital and provides a financial framework within which delivery of the council's priorities can be progressed.
- 4.6 Through the service planning process, we will ensure resources are aligned with the Corporate Strategy priorities, transitioning our existing spend towards the priorities outlined in the strategy. We will continue to work internally and externally with our partners locally, regionally and nationally and leverage additional external funding, targeted and linked to the strategic priorities and objectives of the council.
- 4.7 The MTFP and Capital Strategy approved by Full Council, October 2023 provided an outlined of the national context, new legislative and policy changes that could impact on the budget and medium term plan and the local service and funding issues to which consideration needed to be given over the period. The budget strategy,

presented the proposed approach continued focused on driving a blend of improved outcomes and best value from our existing transformation programme, expanding the opportunities being developed, including optimising our assets in relation to invest to save proposals and being more business-like in relation to income generation, secure more external resource, including options around fees and charges and debt management.

- 4.8 The Chancellor's Autumn Statement and the subsequent Provisional Local Government Finance Settlement which was published in December 2023, was in effect, the second year of a two year settlement. While it resulted in a real terms increase, in the council core spending power in comparison to the prior year. The grant changes in the main were previously announced and planned for in the MTFP, resulting in an overall adverse movement as a result of the reduction applied to the services grant (reduced nationally from £403m to £77m) with elements transferred to the Social Care grants and a 3% Funding Guarantee (£63m).
- 4.9 The positives in the settlement were the confirmation of a further year of New Homes Bonus, business rates multiplier aligned to September CPI (6.7%) and that councils in devolution deal areas are to remain in the 100% business rates retention pilot for a further year. The pilots will be subject to ministerial review of delivery objectives and priorities for 2025/26.
- 4.10 Subsequent to the provisional settlement and report to Cabinet, there has been further announcement of £600 million of funding, with details outlined in the Final Local Government Finance Settlement published 5 February 2024. The settlement included £500 million for social care and £100 million linked to a minimum funding guarantee of 4%; Rural Services Delivery Grant; supports councils with extreme Internal Drainage Board Levies; and gives an increase in funding to the Isle of Wight and Isles of Scilly with residual allocated to Services Grant. There will be conditions attached to the funding as follows, Local authorities will need to develop and share productivity plans, published by July 2024 which will need to be agreed by Council and published on the authority website, covering the following 4 areas:
1. transformation of Services to make better use of resources;
 2. opportunities to take advantage of advances in technology and make better use of data to inform decision making and service design;
 3. ways to reduce wasteful spend within systems, including specific consideration of expenditure on consultants and discredited staff Equality, Diversity and Inclusion programmes – this does not include programmes designed to promote integration and civic pride, and counter- extremism; and
 4. barriers preventing activity that government can help to reduce or remove.

The government will monitor these plans, and funding settlements in future years will be informed by performance against these plans. An expert panel will be established to advise the government on financial sustainability in the sector; this will include the Office for Local Government and the Local Government Association. The government is committed to reforming the local government funding landscape in the next Parliament, and the Minister will be engaging with the sector on this over the coming months.

- 4.11 Confirmation was provided of a £21.7 million grant to compensate authorities for the loss of income from the introduction of the green plant and machinery exemption in

2022/23, 2023/24 and each year until the business rates baseline is reset in 2026-27. In addition to this, a further distribution of £100 million of the surplus held on the Levy Account in respect of 2023/24 is proposed. The impact of the above for the council has been reflected in this report. The government is committed to reforming the local government funding landscape in the next parliament, and the minister will be engaging with the sector on this over the coming months.

- 4.12 The continuance of limited funding periods, short term local government allocations and the scale of specific and one-off grants allocated in the settlement provides the greatest indication that local government funding reforms such as the Fair Funding (aimed at designing a new system for allocating funding between councils via a renewed methodology) and Business Rates reviews (100% to 75% or 50% retention and wider reforms of the business rate system) are likely to be introduced in 2025/26 and 2026/27 respectively. These reforms will set new funding baselines for every authority and presents a significant risk to future funding for the council.
- 4.13 The budget has been prepared considering the strategic documents, outlined above, ensuring that each year's budget is set within the context of the council's ongoing sustainability over the whole planning period. Throughout the process of setting the budget, the council has been very mindful of the impact of changes or reductions on residents. Equalities Impact Assessments (EQIAs) are included in this and associated reports. Decision makers will need to take them into account when considering these budget proposals.

5. Current Revenue Budget Position for 2023/24

- 5.1 This report is concerned mainly with the budget estimates for 2023/24. However, it is to consider the current year's financial performance since it has formed the starting point and springboard for formulating these budget estimates. Budget 2024/25 is based on the latest forecast outturn as at Quarter 3/Period 8 2023/24.
- 5.2 The current full year forecast position, based on known information at the end of November 2023 is a net £5.5 million (1.1%) overspend against the approved general fund budget. This £5.5 million reflects risks with the Adult Social Care, Resources and Growth and Regeneration Directorates. It is expected that where possible mitigations will continue to be explored across services within the directorates to contain cost pressures within the delegated cash limits.
- 5.3 In the Final Local Government Finance Settlement the government announced two additional business rates grants:
- A green plant and machinery exemption compensation grant to reimburse the council for lost income as a result of the introduction of the green plant and machinery exemption. For Bristol this equates to £0.567million (£0.279m & £0.288m for 2022/23 & 2023/24 respectively).
 - A release of £100 million one-off funding has been announced from the Levy Account. The Secretary of State makes a judgement every year about the amount to distribute based on the levy payments received and safety net payments made. The surplus relates to 2023/24 and allocations from the Levy Account are distributed pro rata to Settlement Funding Assessment (SFA) and are outside Core Spending Power. As such it can be recognised in the 2023/24 accounts. The allocation is expected to be in line with prior year which, for Bristol, is £0.855 million.

Given the current and further non mitigated pressures emerging within Growth & Regeneration and adult social care, it is proposed that this additional funding of circa £1.4 million is proposed to be retained in 2023/24 to contribute to the financial pressures where further mitigations may be required in year.

- 5.4 The in-year outlook position reflects the application of an £18.5 million supplementary estimate to Children and Education directorate budget, reflecting the Directorate's overspend. The supplementary estimate is presented for approval as part of the Budget 2024/25 report to ensure demand-led service can continue to be provided in the case that they are required to meet Q3/P8 2023/24 full year forecast spending requirements (see Appendix 15).
- 5.5 For ring-fenced accounts, latest in-year forecasts report £0.2 million underspend for the HRA (-0.2%), £16.4 million overspend for the DSG (3.6%) and a balanced position on the Public Health grant.
- 5.6 The ongoing pressures that have been identified through budget monitoring are taken into consideration in preparing both the Medium Term Financial Plan and has both the outturn and the planning evolve are reflected in the 2024/25 budget and medium term plan.
- 5.7 Further details of the forecast year end position can be found in the Q3/P8 2023/24 Financial Monitoring Report presented to Cabinet 23 January 2024.
- 5.8 Following the preparation of the budget report for Cabinet and the Period 8/Quarter 3 2023/24 Financial Monitoring Report a further £3 million of service pressure has been identified in Temporary Accommodation. This is where demand growth has been outstripping expectations, including significant increase on the number of families and single people requiring temporary accommodation and subsidy loss increases reflecting this. It is anticipated that the Growth & Regeneration directorate will explore opportunities for further mitigations in 2023/24 and a one off provision has been made in the budget for 2024/25 to provide sufficient time for longer term solutions to be identified.

6. General Fund Revenue Budget 2024/25

- 6.1. Full details of the 2024/25 service cash limit budgets are set out in Appendix 1 with key areas of investment and savings set out below.
- 6.2. The General Fund base budgets are the most significant elements of the council's budget. They are the mainstream budgets for services and are monitored monthly and reported to the Corporate Leadership Board, the Mayor and Cabinet. An incremental budgeting approach has been adopted to provide a consistent and easily understood mechanism to update and review budgets and enables the changes applied to year-on-year budgets to be transparent.
- 6.3. The funding settlement along with amendments to assumptions around inflation and service demand, reflecting known changes on potential variations since October's MTFP, have been reflected in the funding position of this budget proposal. After

savings, the council presents a balanced budget position over the full five year MTFP period. This is underpinned by contributions to reserves in the first two years, with drawdown from reserves in the following two years. This reflects an expected steep decline in funding at 2025/26 when a number of the funding streams are expected to cease, coinciding with the business rates revaluation exercise that is also expected to reduce the council's funding significantly.

- 6.4. The proposed General Fund revenue budget for 2024/25 totals £530.1 million, a net increase of £46.5 million from the 2023/24 baseline budget (£483.5m). Within this are savings and efficiencies options, both recurrent and non-recurrent, amounting to a net position of £24.1 million (after cost to deliver), of which £23.4 million is attributed to 2024/25.
- 6.5. All residual savings approved in prior years must be carried forward and included in determining the council's overarching budget requirement. After write-offs and amendments have been applied, the budget now includes a savings target of £13.6 million from previous budget rounds (of which £10.0m is attributed to 2024/25).
- 6.6. The overarching savings figure built into the budget (net of any write-offs) is therefore restated to £39.3 million of which £34.0 million is attributed to 2024/25. The table below provides a summary of the position.

Table 2: Summary of savings

Description	24/25 £m	25/26 £m	26/27 £m	27/28 £m	28/29 £m	Total £m
Future Year Savings from 2023/24	(14.108)	(1.973)	(1.061)	(0.547)	-	(17.689)
Future Year Savings Written Off	4.083	-	-	-	-	4.083
	(10.025)	(1.973)	(1.061)	(0.547)	-	(13.606)
New 2024/25 Proposals	(23.971)	(0.685)	(1.950)	(0.810)	(0.324)	(25.722)
	(33.996)	(1.289)	(3.011)	(1.357)	(0.324)	(39.328)

- 6.7. It should be noted that this is presented for completeness and that supplementary approval is not being sought for previously agreed savings. The full details of all previous and new savings in the budget are outlined in Appendix 8.
- 6.8. The council applies an optimism bias to support any further variations that may occur in relation to delivery and/or consultation, reflecting that a number of the savings are in early development. There is previously approved optimism bias linked to the prior year savings carried forward of £1.5 million (of which £1m relates to 2024/25) and £4.8 million linked to the savings outlined in this recommendation (of which £3.0m relates to 2024/25).
- 6.9. The key components of the General Fund budget of £530.1 million are summarised in the table below. Significant investment continues to be made in services that support the most vulnerable in our community and to tackle the cost of living crisis

that is impacting local government and all public and private sector businesses across the UK.

- 6.10. It is proposed that reserves are bolstered marginally in the first two years of the medium term position to enable the anticipated drop in funding during 2026/27 to be smoothed through application of drawn down reserves over two years whilst the position stabilises. This will provide a cushion enabling a stable medium term position throughout the full five year period and for key services to be maintained while greater certainty is obtained in relation to the future economic conditions.

Table 3: Summary of proposed General Fund revenue budget

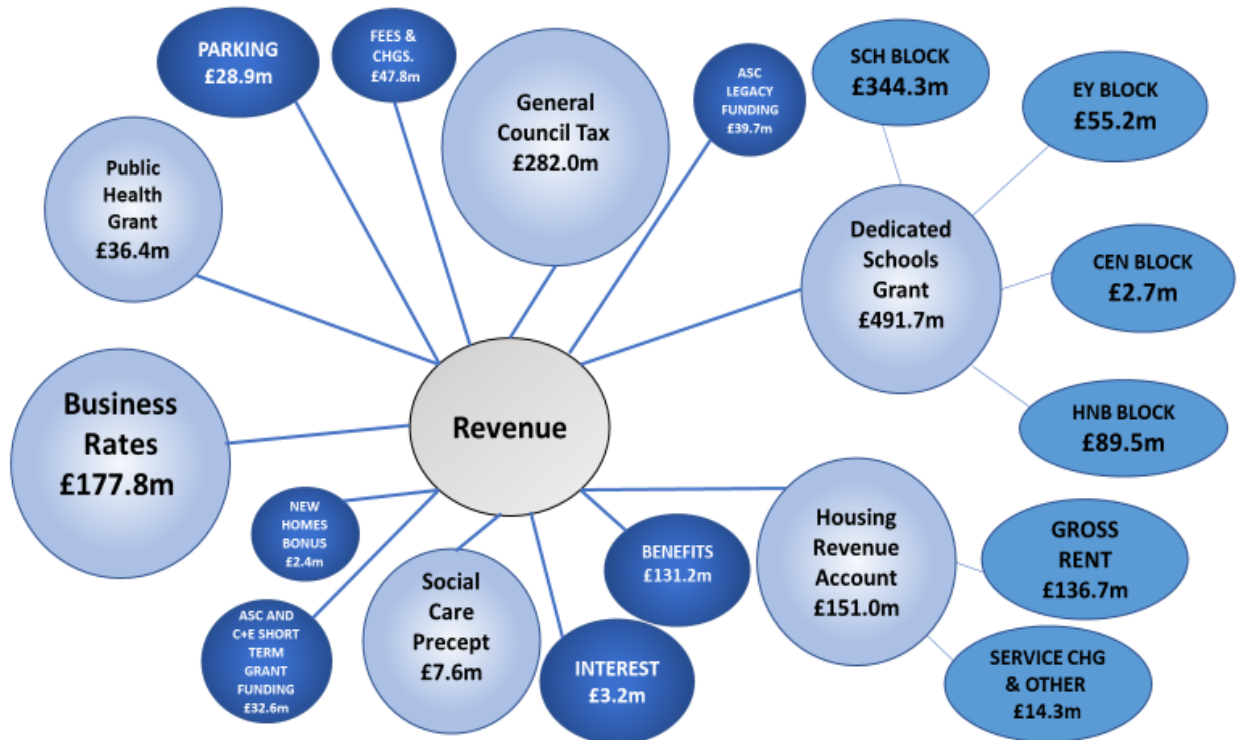
2023/24 Budget £m	Description	24/25 Budget £m	25/26 Projection £m	26/27 Projection £m	27/28 Projection £m	28/29 Projection £m
191.712	Adult & Communities	206.116	213.304	219.191	226.351	231.004
110.003	Children & Education	130.943	130.900	132.384	135.216	136.852
45.872	Resources	52.662	52.102	51.625	51.585	51.544
61.567	Growth & Regeneration	66.018	63.728	63.688	63.318	63.244
74.369	Corporate	74.332	81.676	87.329	95.979	103.047
483.523	General Fund Budget Requirement	530.071	541.710	554.217	572.448	585.691
(258.801)	Council Tax	(282.047)	(297.373)	(313.533)	(330.581)	(348.543)
-	Council Tax Second Home Premium	-	(2.876)	(3.020)	(3.170)	(3.328)
(153.451)	Business Rates (NNDR)	(177.782)	(182.255)	(161.316)	(163.489)	(165.823)
(1.599)	New Homes Bonus	(2.418)	-	-	-	-
(4.126)	Services Grant	(0.712)	-	-	-	-
(56.790)	Social Care Grant	(71.595)	(70.432)	(70.432)	(70.432)	(70.432)
(3.929)	Movement To / (From) Reserves	6.986	11.226	(5.916)	(4.776)	2.436
(4.827)	Collection Fund Surplus/(Deficit)	(2.507)	-	-	-	-
(483.523)	Total Funding	(530.071)	(541.710)	(554.217)	(572.448)	(585.691)
-	Budget Surplus/(Deficit)	-	-	-	-	-

*totals are subject to rounding up/down

- 6.11. The following specific changes and key assumptions have been made in the development of the 2024/25 budget:
- Council Tax increase of 4.99% (including 2.99% for general purposes and 2% Adult Social Care Precept) continuing for the medium term in line with steer from central government
 - Introduction of 100% council tax premium on second and empty homes subject to parliamentary approval from 2025/26
 - 100% business rates retention until 2025/26 only and multiplier uplifted by CPI.
 - Green plant and machinery exemption compensation 2024/25 with rates reset due from 2026/27
 - A pay award/NIC capped (£9,100) of 5%

- New social care grant 2024/25 and residual social care grants – rolled into the fairer funding review and cash flat thereafter
 - No general inflation uplift to be applied to service expenditure budgets
 - Inflation uplift of 6.7% to be applied to all fees and charges in line with September CPI
 - Specific inflationary increases in Private Finance Initiative (PFI), social care and essential services eg utilities
 - Capital Financing – assumption that borrowing costs peak at 5.5%
- 6.12. It is important that the council continues to plan and grow our local tax base which provides real additional resource that can assist with managing increases in service demand, population growth, inflationary pressures and changes in government funding.
- 6.13. During this period of continuous uncertainty, we are conscious of the impact of council tax increases on Bristol residents. Given the growth in demand for our services and the absence of any new permanent funding being made available by government, the council is required to take action to ensure the sustainability of services. The council tax increase proposed for 2024/25 is in line with the assumptions underpinning the core spending calculations and funding distributed.
- 6.14. Whilst this report focuses predominantly on core funding streams, it is worth noting that the council receives a wide range of external grants and other income streams applied directly to service budgets for delivery of key services.
- 6.15. Figure 1 below provides an illustration of the composition of all external income streams anticipated for 2024/25.

Figure 1: Breakdown of budget income 2024/25



Fees and charges

- 6.16. The 23/34 budget and medium term plan approved in February 2023 anticipated an annual general inflationary uplift of 5% in 2023/24 to ensure budgets remain sustainable in real terms with a 3% increase in 2024/25. This was attributed to pay, prices and contract costs partly offset by assuming an equivalent increase in all fees and charges. This provision was in line with the medium-term target rate set by the Government for the Bank of England.
- 6.17. However, with the continuing international economic instability and national political uncertainty there has been increased inflationary pressure across most sectors. The local government Pay award (ranged from 3.8% up to 12.6% (averaging 6.0%). Increase in the National Living Wage and current year and future forecasts for inflation, are for an average of 7.3% this year, 3.6% next year before settling back to nearer the long-term trend of around 2% for the rest of the medium term planning period.
- 6.18. No general inflation allocation is provided for the majority of the council's services and given this position it is not possible for all services to generate sufficient additional efficiencies to absorb the increased inflationary cost, while many areas are also seeing increased demand.
- 6.19. Positive action by services has managed the impact of inflation in 2023/24 on a one off basis and in other areas these price fluctuations are reflected in the overspends reported. For many services to remain sustainable there is a need to recalibrate fees and charges for 2024/25 and beyond to provide the necessary funding for excess inflationary costs in 2024/25. There is a material risk about the council's ability to continue to absorb cost increases that are higher than resources year-on-year and could lead to additional budget pressures in future years.
- 6.20. In the context of sustained, historically higher levels of inflation and the resultant increased costs of service provision, it is proposed that this risk will be managed in 2024/25 through the recalibration and realignment where appropriate of fees and charges. The council charges for services, some of which are established by statute and are not within the power of the council to amend locally, whilst others are discretionary and are set as part of the annual budget report.
- 6.21. General Fund discretionary fees and charges are increased by the September (prior year) CPI Index rate, on 1 April 2024, unless otherwise stated. Most working-age benefits, pensions, business rates multiplier, and rent charges are also aligned to September's CPI inflation rate, which measures how fast prices have risen in the previous 12 month period, and as such will rise by at least 6.7%, in April 2024.
- 6.22. This uplift has been assumed against all relevant budgets at 6.7% for 2024/25, and at 2% from 2025/26 onwards (planning assumption subject to confirmation). This will enable services to recover costs and operate sustainably in a high inflation economic environment. Where charges are set as full cost recovery on an externally directed basis, or are set by statute, they are assumed to be set at the relevant directed values, which will differ to the standard inflationary assumption. Some of these fee and charge increases still require notification to the council so they will be updated when we have the relevant confirmations.

6.23. If there are any proposed increases that are above the council budgeted level, they will need to be brought forward for decision under the appropriate decision pathway.

Service and corporate pressures

6.24. As part of the budget process each year, we look at unavoidable financial pressures on services that will have an on-going budgetary impact, some of which are outside of the control of services and cannot be immediately mitigated by savings and efficiencies. Examples of these would be non-negotiable contractual changes, which have a direct impact on costs; legislative changes such as new functions / standards; and organisation development. There are other areas where the current budget is not adequate for the level of demand within the service or loss of grants / income is anticipated; whilst these can be addressed, they cannot be addressed immediately due to the need to revise commissioned activity or develop exit strategies.

6.25. The table below provides a summary of expenditure pressures with further detail in Appendix 10.

Table 4: Breakdown of baseline expenditure pressures and investments

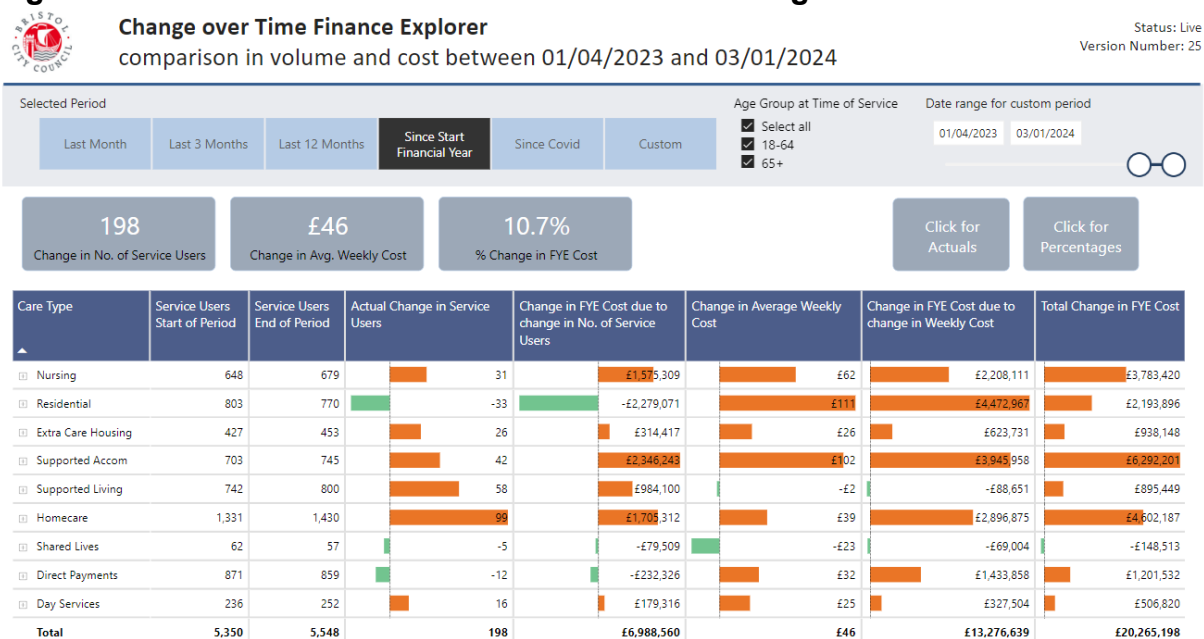
Investment	24/25 £m	25/26 £m	26/27 £m	27/28 £m	28/29 £m	Total £m
Pay Inflation Pressures	10.648	4.559	4.527	4.367	4.454	28.555
Non-Pay Inflation Pressures	11.884	8.728	8.004	9.655	10.648	48.919
Total Service Pressures	40.334	2.755	3.259	3.111	1.358	50.821
Total Corporate Pressures	15.530	(5.672)	(0.569)	(0.250)	-	9.039
Total	78.396	10.370	15.221	16.883	16.460	137.334

Adult Social Care & Communities and Public Health

6.26. Adult Social Care (ASC) continues to face significant demand and resource challenges in meeting care and support needs, with a provider sustainability issue from rising costs, significant inflationary pressures, and workforce pressures which continue to make this a challenging context for the service.

6.27. Since 1 April 2023, ASC has seen a 3.7% increase in the number of people who draw on long term care and support services and is currently supporting 5,548 people (as at 3 January 2024). This represents the equivalent of a 10.7% (full year equivalent) change in costs as set out below.

Figure 2: Adult Social Care Cost & Volume Changes since 1/4/2023



6.28. The additional cost of supporting increased numbers of people, within a finite resource envelope, whilst also needing to deliver financial savings, has been a significant service challenge. At period 8 (as reported to Cabinet January 2024) ASC were forecasting an overall overspend of £2.2 million against its £194.0 million revised budget, with savings still to be achieved before the end of the financial year.

6.29. Adult Social Care divisions have continued to experience significant service pressures and associated financial risks in relation to adult purchasing budgets in 2023/24, with a £13.2 million risk of overspend in this area. This is a significant financial risk area with the current pressures as follows:

- older adult 65+, £6.5 million overspend
- working age adults, £8.1 million overspend
- preparing for adulthood, £1 million overspend
- which are partially offset by additional income contributions of £2.4 million.

6.30. Adult Social Care is continuing to work on its service transformation programme which seeks to both improve service delivery and, longer term, help create a more sustainable financial position.

6.31. As widely reported, the recruitment and retention difficulties experienced across the health and social care sector continue to be a significant challenge to ensuring timely provision of care and support. A review of pay for posts across social workers and occupational therapists is anticipated, in line with pay equalities work already underway in Children's & Education. Funding is held on a one-off basis in the corporate pressures to support the pressure that this would present during 2024/25 and to enable the service time to review how the impacts can be managed through their transformational development in the longer term from 2025/26

6.32. For 2024/25 there are a number of service expenditure growth and investments needed to support adult social care totalling £10.6 million in 2024/25 (as set out in

Table 5). These include demographic pressures and increased numbers and cost of young people transitioning from children to adult services.

Table 5: Breakdown of baseline expenditure pressures and investments – Adult & Communities

Year Inc From	Investment	24/25 £m	25/26 £m	26/27 £m	27/28 £m	28/29 £m	Total £m
22/23	Demand and Demographic Growth	1.037	0.885	1.186	1.196	-	4.304
23/24	Preparing for Adulthood - Cost of Care	0.355	0.366	-	-	-	0.721
23/24	New Burden: New Better Care Fund	2.095	-	-	-	-	2.095
23/24	Environmental Health - Statutory Food Safety Inspections	0.085	-	-	-	-	0.085
24/25	Demand and Demographic Growth	-	-	-	-	1.000	1.000
24/25	New Burden for Transfer of Care - First Cohort	0.655	0.655	-	-	-	1.310
24/25	New Burden for Transforming Care linked to Hospital Discharge to the Community	-	1.966	-	-	-	1.966
24/25	Core Grants in Service: Market Sustainability and Improvement Fund	2.391	-	-	-	-	2.391
24/25	Core Grants in Service: Adult Social Care Discharge Fund	0.622	-	-	-	-	0.622
24/25	Core Grants in Service: Independent Living Fund	1.618	-	-	-	-	1.618
24/25	Core Grants in Service: Adult Social Care Market Sustainability and Improvement Fund - Workforce Fund	1.733	-	-	-	-	1.733
Total Adult & Communities		10.591	3.872	1.186	1.196	1.000	17.845

6.33. In addition, care provider contractual inflation uplifts for 2024/25 for packages of care will see a significant rise in costs as a result of increases in the retail price index and living wage assumptions. Inflationary uplifts will be met corporately for 2024/25.

The Settlement - social care services funding

6.34. The Local Government Finance Settlement sets out proposals for social care services funding for 2024/2025. This includes the following funding streams:

- The Social Care Grant nationally will be £4.5 billion in 2024/25, an increase of £692 million. The Social Care Grant can be used on either adult or children's

social care services. Bristol's share is £41.5 million (this includes the subsequent announcement of an indicative £4.2 million for Bristol). There is a change in emphasis about how authorities should use the additional funding, with greater priority now for children's services: "while being mindful of pressures in adult social care".

- £2.14 billion through the Improved Better Care Fund. This is the same quantum as 2023/24. The distribution is also unchanged and Bristol will receive £17 million
- An additional £200 million will be distributed in 2024/25 through the Discharge Fund to support timely and safe discharge from hospital into the community by reducing the number of people delayed in hospital awaiting social care. This will bring the overall size of the local authority component of the Discharge Fund to £500 million. Bristol's share of the discharge fund is £4 million.
- £1.05 billion in 2024/25 will be distributed for adult social care through the Market Sustainability and Improvement Fund (MSIF), which continues to include £162 million per year of Fair Cost of Care funding. It also includes £205 million MSIF - Workforce Funding (a 2-year fund announced in July 2023 which will be rolled into the existing MSIF). Bristol's share of this funding is £8.9 million.

Children, Families and Safer Communities Teams

- 6.35. 2023/24 has been a challenging year for Children's Services. There has been significant pressure resulting from an increasing number of Looked after Children placements and an even bigger pressure on the unit cost of these placements due to local sufficiency challenges.
- 6.36. To date, the rate of referrals has been higher in 2023/24 than in 2022/23, with our current number of looked after children's placements as at P8/Q2 standing at 1,442. This is due to a significantly higher number of referrals in May through to July, and in October and November. Re-referral rates in Bristol remain high with monthly peaks in July and September at 38.3% and 36.8% respectively with overall performance at 25% for the year to date compared to the national average of 22% and statistical neighbour average of 23%. After a significant improvement in referrals resulting in No Further Action (NFA) in October at 8.6% there has been an increase again to 17.1%. The national and statistical neighbour averages are 7% and 11% respectively.
- 6.37. Numbers of Children in Care have increased since September and there has been a steady decrease in the rate of these cases placed in foster placements. Short term stability of placement however remains good at 7% of children in care having 3+ placements in the past 12 months compared to 10% nationally and 11% for Bristol's statistical neighbours and a rate of 68% with long term placement stability slightly below Bristol's statistical neighbour's average of 70% and the national average of 69%. A new measure reported this year nationally has indicated the short-term stability details for those with 3 placements in the past 2 years. Bristol also performs well here at 17% compared to 22% nationally.
- 6.38. Overall placement costs have on average risen by 17%. The 2024/25 budget includes £15.0 million of additional service growth/investment which includes £4.2 million allocated from the announcement of additional social care funding (excluding pay awards and inflation, which would take this figure to £19.4m).

Table 6: Breakdown of baseline expenditure pressures and investments – Children and Families

Year Incl. From	Investment	24/25 £m	25/26 £m	26/27 £m	27/28 £m	28/29 £m	Total £m
22/23	Benefit from Invest to Save - Children's Placements Demand and Cost Pressures	(1.195)	(0.671)	-	-	-	(1.866)
22/23	Bristol Children's Home Staffing and Maintenance Costs	0.250	-	-	-	-	0.250
23/24	Placement costs - Additional Children From 2023/24	1.296	1.335	1.375	1.416	-	5.422
23/24	Additional Social Workers to Support Increasing Children's Numbers	0.054	0.055	0.056	0.058	-	0.223
23/24	Phoenix Court	(0.065)	-	-	-	-	(0.065)
24/25	Probation Checks & Local Authority Designated Officer (LADO) Changes in Guidance	0.084	-	-	-	-	0.084
24/25	Additional Pressures from Child Support Agency (CSA) Mandatory Reporting Requirements	0.055	-	-	-	-	0.055
24/25	Working Together Implementation	0.066	-	-	-	-	0.066
24/25	Children's Social Care Placement Demand Growth - additional children	0.328	0.338	0.348	0.359	0.359	1.732
24/25	Children in Need - Support for Children at Home	2.000	-	-	-	-	2.000
24/25	Prior Year Recurrent Service Pressures	12.123	-	-	-	-	12.123
Total Children and Families		14.996	1.057	1.779	1.833	0.359	20.024

Education

- 6.39. The Education and Skills service continues to experience increase in the number of Education Health and Care (EHC) assessments which has placed significant pressure on service budgets in the year.
- 6.40. The number of EHC plans (EHCP) issued has also seen another significant in-year increase. In 2021, a total of 579 EHCPs were finalised for the first time. In 2022, this figure was 791, whilst to October 2023, 688 plans had been issued, with five months of the year remaining.
- 6.41. The Home to School Transport service remains under significant pressure from the increase in the proportion of children with EHCPs needing travel support, together with limited local capacity, and increasing supplier costs. The 2024/25 budget includes £5.8 million of additional service growth/investment to address the key challenges.

Table 7: Breakdown of baseline expenditure pressures and investments – Educational Improvements

Year Incl. From	Investment	24/25 £m	25/26 £m	26/27 £m	27/28 £m	28/29 £m	Total £m
22/23	Home to School Transport Increased Demand	0.051	0.053	0.053	0.053	-	0.210
22/23	Special Educational Needs Support	0.385	-	-	-	-	0.385
23/24	Home to School Transport - Price and Volume	1.252	0.626	-	-	-	1.878
24/25	Prior Year Recurrent Service Pressures	4.150	-	-	-	-	4.150
Total Educational Improvements		5.838	0.679	0.053	0.053	-	6.623

Growth and Regeneration

6.42. The Growth and Regeneration (G&R) directorate has several key priorities which this budget is designed to support, as follows:

- Sustainable and inclusive economic growth
- Housing and regeneration
- Preventing homelessness
- Ensuring that air quality standards are met across the city
- Community participation

6.43. While Bristol as a place continues to bounce back following the pandemic, 2023/24 has been challenging with continued pressures on Temporary Accommodation places, more specifically, increased demand in the second half of the year and housing benefit subsidy loss, for which £3.0 million has been allocated in 2024/25 to provide one off support whilst the transformation programme continues to develop. In addition to this, electricity and gas prices remain significantly higher than before the war in Ukraine and the cost-of-living crisis. The table below outlines the emerging pressures that are now built into the base budget from 24/25 onwards.

6.44. It should be noted that inflationary uplifts for energy price pressures and other related areas, and staff salaries, are held corporately and may be requested, if they cannot be contained within the directorate cash limit. The 2024/25 budget includes £6.4 million of additional service growth/investment to address the key challenges.

Table 8: Breakdown of baseline expenditure pressures and investments - Growth & Regeneration

Year Incl. From	Investment	24/25 £m	25/26 £m	26/27 £m	27/28 £m	28/29 £m	Total £m
23/24	BWC - Transfer of additional Waste Efficiencies	0.029	0.029	0.030	0.030	-	0.118
23/24	BWC - Facilities Management Net Annual Contractual Efficiencies	(0.005)	(0.019)	-	-	-	(0.024)
24/25	Prior Year Recurrent Service Pressures (Energy)	1.550	-	-	-	-	1.550
24/25	BWC Municipal Costs - Waste Growth and Demand Pressures	1.800	0.500	0.500	-	-	2.800
24/25	Increased Kennelling Costs	0.050	-	-	-	-	0.050
24/25	Temporary Accommodation Demand	3.000	(3.000)	-	-	-	-
24/25	Core Grants in Service: Food Security Enforcement	0.014	-	-	-	-	0.014
Total Growth & Regeneration		6.438	(2.490)	0.530	0.030	-	4.508

Service Area

Resources

6.45. The Resources directorate contains the council's key resident facing services (such as Citizens Services, registrars, mortuaries, administering council tax, business rates, local crisis prevention fund and housing benefits) as well as further professional support services which support the strategic direction of the council and provide essential support to members and managers to improve outcomes and deliver change. Beyond its core, statutory and regulatory duties, the directorate also serves some of the most vulnerable in the city. It is proposed that in 2024/25 £0.350 million, will be allocated to the Local Crisis Prevention Fund to support economically vulnerable households in the most need to reflect the continuation of the cost of living crisis. This fund will reduce to £0.288 in 2025/26 and it is our ambition that should any further external funds such as the Household Support Fund be announced in the coming months this will be increased to enable the council to provide further support during school holiday periods. The 2024/25 budget includes £2.5 million of additional service growth/investment to address the key challenges.

Table 9: Breakdown of baseline expenditure pressures and investments – Resources

Year Inc from	Investment	24/25 £m	25/26 £m	26/27 £m	27/28 £m	28/29 £m	Total £m
23/24	Legal/Mortuary & Coroner Contract, Backlog and Staffing Cost	(0.058)	-	-	-	-	(0.058)
24/25	Additional phone lines required to ensure Payment Card Industry (PCI) Compliance	0.035	-	-	-	-	0.035
24/25	Revenues Income / Debt Collection	0.300	(0.300)	-	-	-	-
24/25	Leader's Office staffing	0.100	-	-	-	-	0.100
24/25	Committee Model staffing	0.300	-	-	-	-	0.300
24/25	Coroners - Deceased Transport Contract	0.123	-	-	-	-	0.123
24/25	Coroners - Histology & Toxicology Contract	0.082	-	-	-	-	0.082
24/25	Prior Year Recurrent Service Pressures	0.507	-	-	-	-	0.507
24/25	Core Grants in Service: Local Council Tax Support Admin Support Grant	0.724	-	-	-	-	0.724
24/25	LCPF Household Support for Low Income Families	0.350	(0.062)	(0.288)	-	-	-
24/25	Core Grants in Service: Family Annexe Council Tax Discount	0.009	-	-	-	-	0.009
Total Resources		2.472	(0.362)	(0.288)	-	-	1.822

Corporate expenditure

6.46. Central accounts hold a variety of corporate budgets which do not relate directly to individual services, as well as council-wide budgets which, largely for timing reasons, are not allocated to individual services. Generally, these council-wide budgets will be allocated to services during the financial year once their impact is known. Corporate budgets include the council's capital financing costs which includes the revenue implications of the council's capital and other investment areas which must be accounted for in line with the capital accounting requirements. A one off £1.2 million in 2024/25 has been earmarked to provide time to address the potential implications of the Adult Social Care equal pay review as outlined in section 6.31. The 2024/25 budget includes £15.5 million of additional corporate growth/investment to address the key challenges.

Table 10 : Breakdown of baseline expenditure pressures and investments – Corporate

Year Inc From	Investment	24/25 £m	25/26 £m	26/27 £m	27/28 £m	28/29 £m	Total £m
24/25	Insurance Premium & Self Insurance Fund	1.500	-	-	-	-	1.500
24/25	PFI - Education & Leisure Unitary Charge	2.000	-	-	-	-	2.000
24/25	Professional Fees - including accounts	0.500	-	-	-	-	0.500
24/25	SEND Project Delivery Capacity	0.663	0.555	(0.569)	(0.250)	-	0.399
24/25	SEND Transformation - Corporate Contribution	3.500	-	-	-	-	3.500
24/25	ASC Equal Pay Evaluation	1.227	(1.227)	-	-	-	-
24/25	Transformation Delivery Capacity	6.140	(5.000)	-	-	-	1.140
Total Corporate		15.530	(5.672)	(0.569)	(0.250)	-	9.039

6.47. The transformation delivery capacity funding is to enable the cost of delivering change to be met by the council. The report recommends delegation to the Corporate Leadership Board to align the corporate transformation funding of £6.1 million, as required in seeking to ensure that the capacity and resources required to deliver the improved outcomes, financial and non financial benefits envisaged in the transformation programmes being delivered across the council is available.

Levies

6.48. The council is obliged to pay several levies to external organisations, by far the largest of which is the transport levy due to WECA annually (further detail can be seen on WECA in section 12 below). In accordance with accounting requirements, these costs are included in the central accounts.

Pay Awards

6.49. Pay awards and NIC cap (£9,100) for local government workers are agreed in negotiations between employers and trade unions through the National Joint Council for Local Government Services. For 2024/25, 5% is earmarked for pay and NIC assumptions, included in the budget centrally and notionally allocated across directorates at this stage. Its eventual distribution will follow once negotiations with trade unions have been concluded and the outcome and actual requirement clear. The current proposal from the union is for 10% pay award. For 2025/26 onwards a 2% pay award inflation factor is assumed.

Contract Inflation

6.50. In order to deliver efficiencies through contract management, inflation is not applied automatically to all expenditure budgets. It is assumed that this approach will thereby

drive in the region of 5% budget efficiency. Where there are specific services for which inflation is for example index-linked and therefore expected to exceed this general level, an additional corporate provision has been made. Such areas include for example adults and children’s social care, energy pricing, PFI contracts and waste contracts. Included within this is an additional contract inflation contingency provision to recognise the fluctuations and inflationary uncertainty and ensure sufficiency for any unexpected increases over the next financial year.

Table 11: Breakdown of corporate expenditure budgets

Corporate Expenditure	24/25 £m
Capital Financing	26.769
Corporate and Democratic Core and Levies	11.403
Other Including Contract Inflation and Pay Awards	36.161
Total	74.332

Savings

- 6.51. In order to manage the continued pressures that are faced by the council savings have been assumed within the budget position outlined in this report. The delivery of a savings requirement is critical to support the balanced position of the budget given the sustained demand and growth pressures combined with government funding that is not keeping pace.
- 6.52. The council has consistently been required to apply savings over the last decade in response to the austerity measures starting in 2010, in order to ensure a balance budget. Of the savings identified in previous years, there are £13.6 million of proposals identified as deliverable during the 2024/25 to 2027/28 period. These are incorporated in the Appendix 8 to provide a full picture of the savings delivery required along with the new savings identified during this budget setting process.
- 6.53. Following the preparation of the Medium Term Financial Plan and the outline of the indicative budget gap the council has undertaken a prioritised three level approach, with a focus on:
- Maximising the financial benefit from our Top-4 transformation programmes and opportunities to invest to save
 - Securing and more effectively utilising our external incomes
 - Benchmarking services to identify opportunities for reductions, reviews and efficiencies.
- 6.54. The options generated from this approach identified the potential for net savings, income generation, efficiencies and transformation amounting to £21.7 million that were consulted on during November and December 2023.
- 6.55. Following the consultation feedback and further due diligence, engagement, impact assessment and validation some proposals were amended to reflect further development of the due diligence being undertaken.

6.56. There were also a few new items proposed considering the financial gap that remained to be closed that were not sufficiently developed at the time of the consultation. The changes since consultation are detailed in the tables below.

Table 12: Savings amended following consultation

Savings Ref	Description	24/25 £m	25/26 £m	26/27 £m	27/28 £m	28/29 £m	Total £m
24/25-GR007	Alternative investment in sustainable transport	10.300	(4.000)	-	-	-	6.300
24/25-CEN001a	Review fees and charges <i>(alignment by directorate)</i>	0.116	-	-	-	-	0.116
24/25-CEN001b	Review fees and charges <i>(alignment by directorate)</i>	0.479	-	-	-	-	0.479
24/25-CEN001c	Review fees and charges <i>(alignment by directorate)</i>	0.030	-	-	-	-	0.030
TOTAL		10.925	(4.000)	-	-	-	6.925

Table 13: New savings added (including Invest to Save)

Savings Ref	Description	24/25 £m	25/26 £m	26/27 £m	27/28 £m	28/29 £m	Total £m
24/25-CE003	New operating model for Children and Education directorate	0.200	0.400	0.400	-	-	1.000
24/25-R004	Reduce spend on discretionary areas of Learning and Development	0.050	-	-	-	-	0.050
24/25-ITS2/3/4/5/7	Children's Homes Sufficiency	-	0.390	0.570	-	-	0.960
24/25-ITS1/8/10	Fostering Sufficiency	-	0.159	0.159	-	-	0.317
TOTAL		0.250	0.949	1.129	-	-	2.327

6.57. The summary of the proposals put forward as part of this budget amount to £24 million of savings in the 2024/25 financial year, and £1.8 million for future years (full details of the savings recommended for approval are set out in Appendix 8).

6.58. An optimism bias contingency for the new proposals of £4.8 million has been set aside over the 5 years, a 19% value that is reflective of the in-year delivery having been seen in 2023/24. This is earmarked for variation following validation / due diligence, including to enable slippage where identified timescales may need to be moved, and to enable any planned write off or changes to savings as a result of further consultations. A savings contingency at this level is deemed appropriate considering the level of savings proposed and the stage of due diligence on each.

6.59. As part of budget 24/25, previously approved budget savings of £4.5 million have been removed. This is where savings were outlined initially in their infancy and following due diligence and further assessment were established as being undeliverable in the manner originally planned, or where circumstances have changed resulting in the savings no longer being deliverable.

Table 14: List of prior year savings removed from budget 2024/25

			23/24	24/25	25/26	26/27	27/28	TOTAL
			£m	£m	£m	£m	£m	
Growth & Regeneration	2223-GR055	Increase fees for Pay and Display Parking Bays	0.200	-	-	-	-	0.200
Growth & Regeneration	IN27b	Generating and saving money through energy generation and efficiency	0.230	-	-	-	-	0.230
Adults, Community & Public Health	2324-P1	Bristol Community Links Service	-	0.687	-	-	-	0.687
Growth & Regeneration	NEW2223_GR028	Review Museums and Archive Service	-	0.371	-	-	-	0.371
Resources (& Shareholding)	2324-R20	Local council tax reduction scheme	-	3.025	-	-	-	3.025
TOTAL			0.430	4.083	-	-	-	4.513

Long Term Shareholdings and Other Investments

Shareholdings

6.60. The council has a range of long-term investments and shareholdings some of which are wholly owned or to which it has a material interest. In relation to the wholly owned companies, these are complex businesses and when entering into any long-term investments such as these it is important to assess the market conditions and to acknowledge that the industries are ever-changing, and as such will always be subject to external influences, volatilities and risks. The financial performance of these companies and their assets and liabilities are regularly reviewed to ensure that there is no financial implication for the council in future years.

6.61. The council continues to assess the effectiveness of the governance, monitoring and quality performance parameters, regularly reporting to the Shareholder Group and members for informed decision making.

6.62. To ensure the council's investment is protected, commercial information that could impact on an individual company's value will be managed sensitively, with due consideration given to the sensitivity of the information being requested at the time of the request in case any resulting harm would be caused due to its disclosure. However, as a public authority the council should remain open and transparent as far as possible.

- 6.63. The council budget reflects the council's financial commitment, associated reserves and establishes the capital and revenue cash limits that we consider sufficient to meet the business needs. The companies will operate within these council funding parameters for 2024/25 and business plans will be developed within these thresholds as well as utilisation, where appropriate, of our companies' own reserves and contingencies. For further detail please see Appendix 9: Long Term Investments & Shareholdings and Appendix 10: Service & Corporate Pressures.

7. Collection Fund Surplus / Deficit

- 7.1 Bristol City Council is required by statute to maintain a Collection Fund separate from the General Fund of the council. Income from council tax and business rates is fixed at the start of each financial year. Any variations from this are realised through the Collection Fund and distributed in subsequent years. Following changes to council tax discounts, exemptions and localisation of business rates, there is now significantly greater volatility and risk in relation to Collection Fund income.
- 7.2 As reported to Council on 9 January 2024, the total estimated deficit on the Collection Fund for 2023/24, including any brought forward balances is £3.710 million. The Bristol share of this deficit, debited to the general fund in 2024/25, is £4.528 million and includes £1.030 million owed to central government. However, Bristol's share of this deficit can be met from unbudgeted additional business rates income brought forward from 2023/24.

8. Council Tax 2024/25

Council tax precepts

- 8.1 The threshold for increasing the council tax for 2024/25 is 4.99% which includes 2% Social Care Precept and core council tax increase of 2.99%. The precept will need to be identified separately and the s151 Officer will be expected to notify the Secretary of State of the amount intended to be raised and verify that the funding has been used for adult social care.

Calculation of the Council's Tax base

- 8.2 On 9 January 2024 Full Council approved the tax base for the year 2024/25 as 134,752. This represents an increase of 3.93% on the previous year's tax base (129,654).

Council Tax by band

- 8.3 It is recommended that the following amounts be submitted for agreement by Full Council for the year 2024/25:
- £282,398,335 being the sum to be met from council tax in 2023/24 for services provision (£258,801,053 in 2023/24)

Bristol City Council's share of council tax for the year 2024/25 for the services it provides for each category of dwelling is shown as follows:

Table 15: Council tax charges for Bristol City Council element by dwelling band

	Band A £	Band B £	Band C £	Band D £	Band E £	Band F £	Band G £	Band H £
2024/25 Council Tax	1,397.12	1,629.99	1,862.84	2,095.69	2,561.39	3,027.11	3,492.82	4,191.38
2023/24 Council Tax	1,330.73	1,552.52	1,774.31	1,996.09	2,439.68	2,883.25	3,326.83	3,992.20
Percentage Increase	4.99%	4.99%	4.99%	4.99%	4.99%	4.99%	4.99%	4.99%
Annual Increase	66.40	77.46	88.53	99.60	121.72	143.86	165.99	199.18

Empty and second home premiums

8.4 The government has enacted the Levelling Up and Regeneration Act that has made changes to discretionary council tax premiums on empty homes and introduced a potential discount on unoccupied furnished homes.

8.5 Full Council is asked to approve that the following council tax premiums be applied,

- 100% premium for properties which have been empty and unfurnished for a period of between 1 (previously 2) and 5 years effective 1 April 2024
- 100% premium (or the % limit as specified in any regulations) for properties that are substantially furnished but where there is no resident effective 1 April 2025.

8.6 Further details can be found at Appendix 12

8.7 In order to support residents that have difficulty with this increase, Bristol City Council continues to be one of very few authorities to provide a fully funded local Council Tax Reduction Scheme (CTRS) that helps working age households on a low income with up to 100% of their council tax costs. This is also true for pensioners and means a estimated scheme cost of £43.4 million, assisting over 32,200 households.

9. Dedicated Schools Grant

9.1 A summary of the planned use and distribution of the Dedicated Schools Grant (DSG) is incorporated within this report and the full report and associated appendices including the equality impact assessment can be accessed here: [Cabinet: 23/01/2024](#)

9.2 The DSG is calculated based on the following 4 funding blocks: Schools Block, High Needs Block, Central Services Block and Early Years. The overall headline increase in the 2024/25 DSG is £28.8 million (6.2%) giving a total DSG of £491.7 million.

9.3 The table below provides a high-level description for each block and shows the annual changes in funding.

Table 16: DSG funding allocation by block

Block	Purpose	Current 23/24 Allocation £m	24/25 Allocation as at Dec 23 £m	Increase £m	Increase %
Schools Block	For distribution through the formula for mainstream schools and academies and for growth in schools	336.192	344.325	8.133	2.42%
Central School Services Block	For local authority core functions, admissions, and historic commitments	2.717	2.696	(0.021)	(0.77%)
High Needs Block	Funding for pupils with special educational needs in mainstream, special and out-borough schools, for pupils in alternative provision and local authority or commissioned services for high needs pupils	86.645	89.535	2.890	3.34%
Early Years Block	Funding for distribution to Early Years settings for 0-2, 2, and 3-4 year old early years provision, with some provision for central oversight and co-ordination	37.432	55.180	17.748	47.41%
Total DSG Allocation		462.986	491.736	28.750	6.21%

Schools Block

- 9.4 The Schools Block total is £344.3 million and made up of the following:
- Pupil led DSG funding £330.1 million - this is the sum allocated to the LA based on the number of pupils recorded in the October 2023 census
 - Premises led funding £12.2 million - element of the Schools Block DSG that recognises costs not defined by pupil numbers or characteristics
 - Growth Funding £2.0 million - allocation intended to meet the cost of both the growth fund and the additional cost of those pupils in growing schools not yet present in the school census
- 9.5 The DSG allocation as advised by the Education and Skills Funding Agency, takes into account the increase in minimum funding per pupil and the National Funding Formula (NFF). Included in this allocation is funding for teacher's pay and pensions increases that was previously made via grant funding.
- 9.6 The October 2023 census counted 34,671 primary age pupils, down from last year's 35,001. Secondary is based upon 21,789 pupils, up from last year's 21,376. The Minimum per Pupil funding levels are a mandatory item in the formula and the rates are dictated by the NFF. For 2024/25 the primary rate is £4,610 and £5,995 for secondary school pupils.
- 9.7 In developing the formula for 2024/25, following consultation with schools, the Schools Forum agreed the following principles:

- The transfer of 0.5% of the Schools Block to the High Needs Block
- £2.0 million top-slice of Schools Block to create the Growth Fund for 2024/25
- The Minimum Funding Guarantee (MFG) to be set at +0.0%
- The lump sum to be maximised at £139,849 for both primary and secondary
- Any remaining funding directed to the Additional Education Needs (AEN) factors

9.8 Transfer 0.5% of Schools Block to High Needs Block £1.7 million

Schools Forum agreed to the transfer of 0.5% of the Schools Block to the High Needs Block at its meeting in November 2023 and the funding is to be earmarked to support the demand in High Needs. Please note that this is the maximum threshold and any amount beyond 0.5% would require Secretary of State approval.

9.9 Growth Fund allocation £2.0 million

This funding is the top-slice of the Schools Block taken in order to fund growth expansions in existing schools for the following academic year, separate to the growth commitment in new and growing schools which is funded within the formula mechanism. The commitment for 2024/25 is estimated at £1.2 million, leaving £0.8 million for new commitments that may arise during the admissions round.

9.10 The Minimum Funding Guarantee was set at +0.0% in line with prior years, and within the average overall increase individual schools will receive more or less funding, depending on the impact of the changes in the formula and pupil numbers.

9.11 Subject to approval of the draft formula by Schools Forum and the ESFA, overall 110 of the 127 schools are set to receive an increase in cash funding in 2024/25, whilst 17 schools are set to receive less funding than in 2023/24. In all 17 schools that will receive a reduction in funding this is being driven by a reduction in pupil numbers on roll that more than offsets per-pupil funding gains in the formula.

9.12 Details of the Schools Block allocation and funding formula can be viewed by the hyperlink in paragraph 9.1 above.

High Needs Block

9.13 The DSG is forecasted to start the year with a brought forward deficit and the key financial pressure within the DSG is in the High Needs Block. The High Needs year end deficit is currently forecasted to be £59.1 million.

9.14 With agreement from the Schools Forum, £1.7 million (0.5%) is proposed for transfer from the Schools Block to the High Needs Block to support increasing demand within that area.

9.15 Despite this additional funding, it is anticipated that the High Needs Block will continue to experience significant pressures. The High Needs Block in year deficit is assumed to be circa £16.6 million based on current forecasted CYP needs.

Table 17: High Needs Block forecast

High Needs Block	Prior Years £m	23/24 £m	24/25 £m
Total Annual Funding (Incl. Block Transfers)		86.6	91.2
Estimated Budget Requirement		(103.2)	(111.3)
Net Annual HNB Deficit		(16.6)	(20.1)
Accumulated HNB Deficit	(40.5)	(57.1)	(77.1)

Early Years Block

9.16 The allocation for Early Years for 2024/25 is £55.2 million. This allocation is still indicative at this stage as the majority of the funding in this block is based on census data in January 2023 and January 2024, and the actual amount will be updated by ESFA once these census figures are known.

9.17 Following sector consultation, the funding allocation proposed to be paid for the early years sector is as below:

- The rates that the LA is proposing to pay to providers for 2024/25 are:
 - 3 and 4 year olds: £5.08
 - 2 year olds: £7.82
 - under 2 year olds: £10.77
- The small increase in the 3 & 4 year olds funding rate proved unappealing to the sector, however as much as was affordable was included and due to funding regulations and restrictions, no further increase is possible without reducing the supplements (which were overwhelmingly supported). The Early Years team is of the opinion that the significantly higher rate for under 2s overshadowed the older age range rates.

9.18 The authority has 60 maintained schools (nurseries, primary, PRU and special). The proportion of these schools that are forecasting a cumulative overall deficit in the year ending 31 March 2024 is 22 (36%), with a cumulative net schools revenue balance of £4.2 million deficit. The current financial climate is challenging for the education sector and the financial health of mainstream schools is deteriorating mainly due to factors such as historical patterns of funding, pupil numbers, post pandemic impact, rising staff and other inflationary costs, the collective effect of which is having a significant impact.

Table 18: Bristol maintained schools 23/24 Q2 forecast position – deficit/(surplus)

Maintained School Type	Opening balance at 01.04.2023 £m	2023/24 In year forecast position (as at Q2) £m	2023/24 forecast closing balance as at 31.03.2023 £m	Total number of schools forecasting end of year cumulative deficit at 31.03.2024
Nursery	7.050	0.165	7.215	11 out of 12
Primary	(3.644)	1.460	(2.183)	8 out of 40
PRU / Special	(1.293)	0.476	(0.819)	2 out of 6
Secondary	(0.392)	0.371	(0.021)	1 out of 2
Total sum	1.721	2.473	4.194	

9.19 The additional funding to support the nursery sector in particular is welcomed and work is underway to ensure a sustainable medium term position can be achieved and a positive cumulative position restored. The council will continue to support nursery schools in seeking a fair government settlement for Early Years providers.

Central Services Block

9.20 The Central Services Block (CSSB) provides funding for the statutory duties the council holds for both maintained schools and academies. The CSSB brings together:

- Funding previously allocated through the retained duties element of the Education Services Grant (ESG)
- Funding for ongoing central functions, such as admissions, previously top-sliced from the Schools block
- Residual funding for historic commitments, previously top-sliced from the Schools block

9.21 The council has proposed a CSSB allocation for 2024/25 of £2.7 million which has been agreed by the Schools Forum. This total is composed of two distinct components:

- on-going functions £2.314 million which has increased from 2023/24 (£2.240m); and
- historic commitments £0.382 million, a decrease of 20% from £0.477 million in 2023/24

This is due to the ESFA proposal to withdraw the historic element over time and this funding is insufficient to support the contribution to combined services delivered at this level.

9.22 The overall CSSB allocation for 2024/25 has reduced by 0.8% (£0.021m)

Overall DSG

9.23 The DSG is forecasted to start the year with a brought forward deficit of £56.076 million and the key financial pressure within the DSG is in the High Needs Block. The overall DSG for 2024/25 is £491.7 million, with estimated 2024/25 spend of £511.8 million. The DSG cumulative deficit is forecast to reach £76.179 million by the end of 2024/25.

9.24 The table below outlines the revised allocations following the proposed movement between the blocks.

Table 19: Forecast block budgets after movement between blocks and carry forward amounts

DSG Blocks	Balance brought forward from 23/24 (forecast)	24/25 DSG Allocation	Movement between blocks	Final DSG budget 24/25	Estimated spend 24/25	Carry forward balance at end of 24/25
	£m	£m	£m	£m	£m	£m
School Block	(0.787)	(344.325)	1.721	(342.604)	342.604	(0.787)
De-delegation	(0.528)	-	-	-	-	(0.528)
Central Services Block	-	(2.696)	-	(2.696)	2.696	-
High Needs Block	57.084	(89.535)	(1.721)	(91.256)	111.359	77.187
Early Years	0.307	(55.180)	-	(55.180)	55.180	0.307
Total	56.076	(491.736)	-	(491.736)	511.839	76.179

*Figures are based on latest allocations published in December '23

9.25 Although the additional High Needs funding is clearly welcome, it is significantly below the expenditure currently being incurred in the High Needs Block and leaves no growth or additional funding to address the historic deficit.

9.26 Statutory Instrument (SI) No.1212 of 2020: The then Secretary of State for Housing, Communities and Local Government laid the statutory instrument (SI) no 1212 before Parliament on 6 November 2020 and it came into force on 29 November 2020. The impact of the SI is to amend the current accounting regulations to allow all DSG deficits to be carried over in a separate dedicated account and therefore not at a charge to the council's revenue account for the term of the override.

9.27 The SI is time-limited and is now due to end on 31 March 2026. Councils are expected to use this period to develop and implement changes to allow the High Needs Block to reach a sustainable position.

9.28 There is no statutory undertaking requiring councils to underwrite DSG deficits and DfE have not provided any clarity regarding how, when or if the deficit will be funded in the longer term. The council therefore would have to ensure there are adequate usable reserves to cover any DSG deficit and a clear plan for sustainability when preparing the council's accounts if the period of the SI is not extended by government beyond 2026.

Table 20: DSG - summary forecast financial position

					In year balance achieved
Overall DSG position	24-25	25-26	26-27	27-28	28-29
Income/surpluses are shown as negatives	Forecast	Forecast	Forecast	Forecast	Forecast
	£m	£m	£m	£m	£m
Brought Forward Unmitigated deficit	56.076	88.392	130.997	179.370	234.441
Unmitigated annual funding gap	32.315	42.606	48.373	55.071	60.023
Carried Forward Unmitigated deficit	88.392	130.997	179.370	234.441	294.464
Annual Indicative Proposed Mitigations	(9.559)	(19.630)	(32.247)	(45.196)	(58.577)
Other income	(2.655)	(3.131)	(3.704)	(4.106)	(4.475)
Mitigated annual funding gap	20.102	19.844	12.421	5.769	(3.029)
Brought Forward deficit	56.076	76.179	96.023	108.444	114.213
Carried Forward Mitigated deficit	76.179	96.023	108.444	114.213	111.184

9.29 The DSG conditions of grant require any local authority with an overall DSG deficit to produce and maintain a DSG Management Plan (DMP). Table 20 gives a summary of the council's current DMP.

9.30 The DMP consists of an initial unmitigated forecast of the overall DSG deficit which is based on extrapolating existing trajectories for demand, complexity of needs and constraints on specialist provision and also incorporates an assumed reduction in the existing backlogs in both assessing the needs of children and young people and their subsequent placement in specialist SEND provision.

9.31 Extensive work with key stakeholders has continued during 2023/24 to develop and validate a set of viable mitigations which will, collectively, enable the council to reduce, and eventually eliminate, the ongoing overspends on the DSG High Needs Block. These mitigations have been modelled and their combined effect can be seen in the Annual Indicative Proposed Mitigations and the Mitigated Annual Funding gap lines in Table 20. Overall, the successful delivery of all the proposed mitigations is projected to result in the DSG achieving an in-year balanced position during 2028/29.

9.32 In considering the DSG net carry forward position the council should also note the LA maintained schools' balances forecast position illustrated in the table below.

Table 21: maintained schools' balances forecast position – deficit/(surplus)

2023/24 Bristol LA Maintained Schools Summary	2023/24 closing Balance forecast at Q2 £m	2023/24 in year balance forecast at Q2 £m	Number of schools with cumulative deficit at 31/3/2024	Number of schools with deficit variance to Q1
Nursery	7.215	0.164	11 of 12	No change
Primary	(1.907)	0.998	5 of 28	No change
Primary with Nursery Class	(0.276)	0.461	3 of 12	Increase of 1
Secondary	(0.021)	0.371	1 of 2	Increase of 1
Special	(0.492)	0.298	2 of 5	Increase of 1
Pupil Referral Unit	(0.325)	0.179	0 of 1	No change
Sub-total	4.194	2.471	22 of 60	
Bristol LA Children Centres	0.640	0.099	1 of 1	No change
Total with children's centres	4.834	2.570		

- 9.33 The maintained schools balances is forecast to be £2.471 million deficit at the end of financial year 2023/24. The main challenges are within maintained nursery schools (MNS). In order to support developing sustainable operating models for MNS, the Early Years Service (EY) continues to work with nursery headteachers and governors to utilise funding agreed with Schools Forum in November 2023 to underwrite the deficit situation whilst recovery plans are developed.
- 9.34 All schools forecasting deficit positions have been notified to produce robust recovery plans to secure their long-term financial sustainability. Discussions are being held with schools' leadership team and schools' governing bodies to explore solutions. Education and Financial Service colleagues are working closely with the schools on their recovery programmes.
- 9.35 To date two nursery schools and one primary school have approved licenced deficit plans, with the remainder continuing to develop satisfactory recovery plans, with the primary school plan achieving a recovered position in 2025/26 and the two nursery school plans recovering by 2027/28.
- 9.36 To support schools whilst they recover their financial situations, the LA proposed, with endorsement from Schools Forum, the use of bridging funding of £1.102 million of earmarked reserves to underwrite the deficit. This £1.102 million is composed of funding from the closed school surplus (£0.517m), the schools in financial difficulty reserve (£0.335m) and from TWS reserves (£0.250m). An additional grant of £0.675 million has also been made available by the ESFA for the support of maintained schools (including nursery schools) in financial difficulty. The ESFA provides separate alternative dedicated support directly to academies that are in financial difficulty. This additional funding stream increases the financial support available to underwrite the schools with deficit positions and in difficulty to £2.047 million.
- 9.37 This £2.1 million mitigation of additional funding is earmarked by the council and Schools Forum to support schools whilst they recover their financial situations. After the reversal of legacy revenue contributions to capital for schools in deficit and

removal of the deficit attributed to a school that has closed in year where the deficit will transfer to the general fund earmarked reserve, this leaves a small forecast positive variance of £0.1m on the reserve. Schools block and early years funding in the DSG has increased by a welcome 8.9%, this may not be sufficient to mitigate the deficit in all schools and settings but should return the net position to a more favourable surplus.

Table 22: Funding to support LA Maintained Schools in financial difficulty

	Funding Source	Description	Available funding £m
1	2022-23 school block surplus	£270k growth fund underspend plus £517k underspend from closed schools	0.787
2	De-delegation surplus	Schools in Financial Difficulty	0.335
3	TWS Reserve		0.250
Subtotal			1.372
4	ESFA grant for schools in financial difficulty	Additional funding for LA maintained schools in financial difficulty	0.675
Total			2.047

10. Public Health Grant

- 10.1 The annual Public Health grant is currently provided to the local authority by the Department of Health and Social Care. The grant is ring-fenced for use on public health functions as specified in the National Health Service Act 2006.
- 10.2 The Public Health grant has a key role to play in improving health by funding vital services, such as smoking cessation, drug and alcohol services, children's health services, as well as broader public health support across local authorities and the NHS.
- 10.3 The Public Health grant in Bristol is £35.9 million in 2023/24 and the allocation as announced 5 February 2024 for 2024/25 is £36.4 million (1.6% cash increase on 2023/24). The allocation includes additional funding to support local authority-led stop smoking services. Overall this represent a real terms reduction, with minimal additional funding to meet pay awards for public health consultant staff and those NHS staff employed on public health contracts.

Table 23: Public Health Budget 2024/25

Public Health Budget 2024/25	Indicative Budget £m
Sexual Health Services	9.700
NHS health check programme	0.436
Health Protection	0.452
Public Health Support to ICB	0.117
Healthy Weight and Physical Activity	1.830

Substance Misuse	9.826
Smoking and Tobacco Control	0.540
Children and Young People	14.385
Public Mental Health	0.043
Community Health Development	1.176
Impact Fund and Advice	0.673
Domestic Abuse and Sexual Violence	1.248
Intelligence, Quality and Governance	1.153
Overheads and Running Costs	1.016
Public Health Spending Related to Covid	0.668
Total Expenditure	43.263
Public Health Grant Allocation	(36.433)
Joint Partnership Income	(6.408)
Drawdown from COMF Reserve	(0.668)
Contribution to / Drawdown on PH Grant Reserve	0.246
Total Income	(43.263)

10.4 The Public Health grant operates on a principal of self-funding. As such, Public Health will seek to contain additional costs and any new burdens directly associated with the funding. Within the council's earmarked reserve is a Public Health ring-fenced reserve of £4.64 million (as at 1 April 2023). The reserve is currently being used to support Public Health priorities which may be subject to risk of inflationary pressures and additional pay awards above those anticipated in the outline budget above and as such £0.246 million is proposed for transfer to the Public Health reserve.

11. Housing Revenue Account

11.1 A summary of the Housing Revenue Account (HRA) budget proposals is incorporated within this report and the full report, associated appendices including the specific equality impact assessment can be found here: [Cabinet: 23/01/2024](#)

11.2 Housing Revenue Account (HRA) covers all activities of the council as landlord. It is a ring-fenced self-financing account, where the council retains all rental income but must finance all capital and revenue costs associated with its existing and new housing stock. The HRA must be balanced annually with no cross-subsidy between the revenue cost of services provided through the General Fund and the HRA, although there are many services provided to both, paid for through recharges.

11.3 The HRA has a housing stock of circa 28,600 (26,800 rented and 1,800 leasehold properties in blocks where the council continues to maintain the common areas and the fabric of the building). In addition, it manages approximately 1,600 garages and owns a small number of other assets, such as commercial units.

11.4 The council has set a budget for the next financial year to ensure that the HRA can deliver its essential repairs, maintenance, and improvements to the housing stock, as well as being able to meet current and forthcoming legislative requirements and a sustainable long-term business plan model, which takes account of capital investment needs over the next 30 years.

- 11.5 The main source of funding for the HRA is rents and service charges. The current average weekly rent for a council home in Bristol is £90.76, whereas the average social rent in England is £98.20. The 2024/25 budget proposes a rent increase of 7.7% in line with the Rent Standard requirements of September CPI +1%. This increase means average weekly rents will rise to £97.75.
- 11.6 A Service Charge is a payment made for services received in connection with the occupation of a home. The charge should aim to recover all reasonable costs in delivering the services. Service charge recovery is covered by legislation, contractual obligations and case law. Cabinet has authorised the Executive Director of Growth and Regeneration, in consultation with the Cabinet Member for Housing Delivery and Homes, to increase and set service charges in line with the anticipated and actual cost of delivery.
- 11.7 The HRA revenue budget is based on forecast revenue income and for 2024/25 the budget is £151 million (£13.6 million increase 2023/24), comprising of £135.6 million rental income (net, after allowing for rent loss for empty properties), £13.4 million service charges (based on actual costs, plus an inflationary uplift) and £1.2 million charges for other assets, including garages, shops, as well as an expected £0.8 million relating to Social Housing Decarbonisation Fund revenue grant. In addition to the above, interest on balances is expected to be £2.8 million.
- 11.8 The HRA Revenue expenditure includes estates and housing services, repairs, maintenance and improvements to council housing, including compliance safety programmes and supervision and management functions. There remain significant inflationary pressures, particularly in relation to materials for developing new homes and improving existing housing stock and for new contracts. This has particularly impacted budget requirements for repairing, maintaining and improving homes and blocks, including fire safety works.
- 11.9 The 2024/25 budget is outlined in the table below with a prior year comparator.

Table 24: HRA Budget 2024/25

Proposed 2024/25 HRA Budget Income and Expenditure	23/24 Budget £m	23/24 P8 Forecast £m	24/25 Proposed Budget £m	Movement £m
Dwelling Rents	(127.153)	(125.878)	(136.317)	(10.439)
Voids	1.637	1.863	0.725	(1.138)
Non-Dwelling Rents	(1.115)	(1.035)	(1.114)	(0.079)
Charges for Services and Facilities	(10.735)	(11.805)	(13.397)	(1.592)
Contributions Towards Expenditure	-	(0.030)	(0.879)	(0.849)
TOTAL INCOME	(137.366)	(136.885)	(150.982)	(14.097)
Repairs & Maintenance	40.058	44.348	43.895	(0.453)
Supervision & Management	34.953	37.203	39.492	2.289
Special Services	16.431	14.525	14.491	(0.034)
Rents, rates, taxes and other charges	0.851	0.109	0.586	0.477
Depreciation & Impairment of non-current assets	31.258	31.258	31.535	0.277
Debt Management	0.041	0.041	0.041	-
Movement in doubtful debt provision	1.370	2.520	1.469	(1.051)
TOTAL EXPENDITURE – CORE SERVICES	124.962	130.004	131.509	1.505
NET COST OF HRA SERVICES	(12.404)	(6.881)	(19.473)	(12.592)
Interest & Investment Income	(0.457)	(7.500)	(2.822)	4.678
Net interest payable, pension costs and other non-operational charges	11.374	11.374	13.229	1.855
Capital Expenditure funded from revenue	47.681	47.681	25.915	(21.766)
(surplus)/deficit for the year on HRA Services	46.194	44.674	16.849	(27.825)
Waking Watch	8.000	9.280	2.100	(7.180)
Draw Down (From)/To Reserves	(54.194)	(53.954)	(18.949)	35.005
NET	-	-	-	-

11.10 Reasons for movement on the HRA budget between 2023/24 and 2024/25 are:

- Rents - the proposed budget assumes that rents are increased by 7.7%, generating an additional £10.4 million in income in 2024/25. This figure includes those properties estimated to come into use during 2024/25 through development and acquisition.
- Net cost of HRA services – the increase in the budget for 2024/25 is due to additional compliance and health and safety works required, through both the repairs programme and Housing Investment Plan (HIP), as well as an increased development programme driving additional borrowings and increased interest costs, offset to some degree by an increase in anticipated investment income on cash balances.
- Depreciation - is the calculated level of basic re-investment needed to keep homes in reasonable repair (calculated using lifecycles / element costs as per our investment planning approach). This sets the minimum level of revenue funding to capital investment in homes to be applied in that year (or set aside in

a separate reserve account to be invested in homes in the future). Depreciation is shown as an expenditure item in revenue, and an income item in capital.

Capital Programme Expenditure

11.11 The overall HRA capital programme for 2024/25 to 2033/34 is £2.27 billion. The full details can be accessed via the hyperlink to the Cabinet reports in section 11.1, the overview is provided in Appendix 2 to this report and in relation to the 30 year business plan model is covered in the section below.

The 30 Year Business Plan model

11.12 The 30-year business plan model communicates a vision for the future of council housing; setting out a long-term pathway which builds on the past legislative changes such as the abolition of the HRA debt cap, and the introduction of greater flexibilities around the reinvestment of Right to Buy receipts. The model has been developed to provide agility and flexibility within the context of a longer term strategic and resource planning process and against a backdrop of increasing demand and major national policy change.

11.13 The plan was last revised in January 2023 and this report provides an update on the refreshed business plan, reflecting the delivery of the new build programme, current policy and finances, increased borrowing costs and wider economic considerations. It also outlines the council's continued ambitions to build more council homes, invest in improving the quality of current stock and improve energy efficiency.

11.14 It is proposed that the HRA will increase its investment in new council homes, delivering 3,082 new council homes to support city aspirations in delivering more affordable housing by 2028/29 and to then develop or acquire 300 council homes a year over the lifetime of the business plan model.

11.15 The proposed levels of investment in existing stock will rely on subsequent decisions, taken annually, regarding rent increases for council tenants. Government policy regarding rents is unknown beyond April 2025. Should the existing policy of allowing above inflationary increases continue, and the council chooses to apply this, any funding generated would be used to improve the condition of the existing stock and deliver additional much needed social housing.

11.16 The plan provides a robust base upon which to analyse future debt capacity levels and the council can affect future operating surpluses through effective cost management, which would increase borrowing capacity. Similarly, increases in inflation, and in particular rent inflation, would add to future capacity to enable investment in the existing stock.

11.17 The Business Plan model should provide a sound basis for the council to inform its future approach to establishing a decision-making framework for its HRA investment and development strategies.

11.18 The 30-year business plan model is based on the following overarching principles and key assumptions:

- Core inflation projected at 6.7% for April 2024, 2% thereafter
- Rents increasing at 7.7% in April 2024, then CPI plus 1% between 2024/25 - 2027/28, and then CPI thereafter. All new lets and re-lets are charged at formula rent levels
- Depreciation provision increasing at CPI throughout and adjusted based on stock numbers
- Maintenance of the existing tenanted stock (subject to Right to Buy sales and inflation) is modelled at a total of £1.759 billion over the 30 years using the latest HIP figures
- £63.932 million (being the remaining balance of the £80m previously reported) of investment in energy efficiency to bring properties up to EPC rating C by 2030. It is anticipated that this level of investment could be further enhanced through the application for grant funding
- £100 million for fire safety works over a 10 year period
- £1.823 million of investment over 3 years for improvements to communal blocks and estates
- £82.928 million for a bathroom replacement programme in council homes by 2039
- £946.369 million from 2024/25 over 5 years - a range of new development schemes delivering a total of 3,082 of new council properties
- £3.139 billion invested into delivering new council homes over the lifetime of the plan
- The inclusion of loans directly attributable to the HRA totalling £1.905 billion, including £244.568 million of 'core debt' associated with the self-financing arrangements agreed in 2012.

11.19 The HRA will require projected borrowing totalling £1.210 billion over years 1 to 10 of the plan to deliver the new developments and additional investment in the existing stock. The prudential borrowing limits for the HRA is based on a maximum Interest Cover Ratio of 1.25, whilst ensuring that minimum balances are held within both the HRA, Major Repairs (£10m) and General Reserve (£26m being the equivalent of 3 months cashflow and a £5m provision to provide further resilience against economic uncertainty and risk exposure). Any new borrowing is subject to a maximum term of 50 years where utilised for the delivery of new homes, and 30 years when invested in existing stock, and must be repaid in full. These assumptions and constraints are contained within the Business Plan.

HRA Reserves

11.20 As at the beginning of 2023/24 the HRA General Reserve balance was £98.795 million (estimated £45.8m, 1 April 2024) and the Unapplied Capital Reserves balance was £67.043 million. The 2024/25 budget proposal assumes that £18.950 million of the General HRA reserve (to fund capital expenditure) and £27.690 million of the Unapplied Capital Receipts Reserve will be utilised in the year in order to fund the Capital Programme.

11.21 This would leave a balance on the General Reserve of £26.840 million as at 31 March 2025 and £53.219 million on the Capital Receipts reserve. The HRA will maintain a minimum level of reserves on the General Reserve at £26 million and a further £10 million on the Major Repairs Reserve. The application and use of

reserves supports the achievement of service delivery and improvements to housing stock.

12. West of England Combined Authority

- 12.1 The West of England Combined Authority (WECA) was formed in 2017 by Bath and North East Somerset, Bristol and South Gloucestershire councils. Since its formation over £1.7 billion of new funding has been secured for the West of England.
- 12.2 With local councils facing continued financial challenges, this additional funding secured by the Combined Authority is providing added value for our region's councils, bringing forward investments and programmes which would not have been possible otherwise. The success of the Combined Authority in securing significant new funding, which would not be available to councils, is helping us support people and businesses across the West of England.
- 12.3 The Combined Authority is working to improve public transport thanks to £540 million secured from government through a successful City Region Sustainable Transport Settlement. This was the highest amount per head awarded anywhere in England.
- 12.4 The Combined Authority is funded through the transport Levy, government grants and a small element of regional business rates retention growth (which would not have been available without forming the Combined Authority).
- 12.5 WECA and its partner authorities agreed five strategic investment priorities, which the budget will support as listed below:
- Climate and ecological emergency
 - Sustainable communities and places
 - Jobs and training
 - Strategic infrastructure
 - Putting the region on the map for national and global success
- 12.6 The levy charge for Bristol is £10.235 million in 2024/25. Unitary Authority levies are pooled by the Mayoral Combined Authority's Transport Integration Team and managed on a regional basis. Projected surpluses or deficits are managed on a regional basis and a transport smoothing reserve has been created to help manage financial risk.
- 12.7 Within the City Region Sustainable Transport Programme, the Mayoral Combined Authority will passport £25 million per annum of capital funding to the West of England Unitary Authorities to provide Highways Maintenance and Transport Improvement Grants. Bristol Council's share is £8.7 million per annum. An additional new pothole funding award was also announced in November 2023 with Bristol City Council allocation for 2024/25 being £1 million.
- 12.8 The published WECA investment programme will continue to support a number of projects and initiatives for our Unitary Authority throughout 2024/25.
- 12.9 The Mayoral Combined Authority is not currently permitted to raise Council Tax to fund any of its activity and therefore no precept will be requested.

12.10 Full details of the WECA Budget proposals are available at www.westofengland-ca.gov.uk.

13. Capital Programme 2024/25 to 2033/34

- 13.1 The council plays a key role in investing in the infrastructure of the city and its communities; providing facilities for local people to use as well as stimulating investment to support growth in housing and business premises that provide jobs and opportunities. This role becomes even more essential in a period of cost restraint and low growth.
- The council's capital strategy which was approved in October 2023 is aligned to the financing principles set out in the MTFP, ensuring that the development of all prospective schemes is based on a clear evidence base and whole-life costing with, where appropriate, anticipated pay-back of the investment. The capital strategy is reviewed annually and in alignment with asset management plans. The approach is for capital investment that it is affordable, sustainable and prudent as well as aligned to the council's corporate priorities. It will support the provision of the right blend of investment in key priority areas to do the following:
Undertake mandatory duties keeping the public safe and maintain its investment
 - Invest for inclusive economic growth
 - Invest to save by reducing costs that would be borne by the revenue account or generating external income.
- 13.2 The capital strategy included the affordability ratios which have been adhered to in developing the proposed capital programme. These include:
- Working within agreed affordability principles for the General Fund (capital financing costs no more than 10% of net revenue budget),
 - HRA interest cover ratio of at least 1.25, new debt repayment and minimum reserves
 - Subsidiary loan / liability exposure – lower of 10% CFR, £70 million
 - Guidance on investments and how Net Present value (NPV) calculation methodologies should be utilised.
- 13.3 The council has an ambitious capital programme over the next ten years. A significant proportion of this programme is aligned to large infrastructure investments that will support long term regeneration across the city, such as programmes of new housing building and developing the Temple Quarter area. This is balanced against areas which will support improvements in on-going council services such as investing in infrastructure to support delivery of social care and education services. In addition, the council has identified investment for decarbonisation initiatives, enablers for transformation and invest to save opportunities.
- 13.4 A review undertaken in 2023-24 to support a programme reprioritisation identified the following new and emerging priority capital investments, which arise from the need to meet the council's principal obligation to keep the public safe and protect its assets. The review also identified 'invest to save' projects across the years 2024/25-2027/28, these are summarised in the table below.

Table 25: New Capital Investments

New and emerging priority capital investments	24/25 £m	25/26 £m	26/27 £m	27/28 £m	28/29 £m	Total £m
New and Emerging Priority						
Investment in the 'New Cut' harbour walls	6.100	-	-	-	-	6.100
Additional investment to keep the council working through investment in hybrid tech and AV equipment	1.000	-	-	-	-	1.000
Further year of investment in IT end user devices	650	-	-	-	-	650
Investment into the Bristol Operations Centre	700	-	-	-	-	700
Investment to ensure council parks assets and investment in the local environment is supported with new ground maintenance machinery	450	-	-	-	-	450
Better managing for Nature	450	-	-	-	-	450
Parks External Electricals Health and Safety and general repairs	400	-	-	-	-	400
Amphitheatre power upgrade (funded from Contingency)	800	-	-	-	-	800
Canford Chapel heating (funded from Contingency)	50	-	-	-	-	50
Invest to Save (ITS)						
Children Homes sufficiency (ITS)	1.570	3.200	-	-	-	4.770
Fostering sufficiency (ITS)	333	333	333	333	333	1.665
Invest to Save Fund	-	225	6.217	672	-	7.114
Total investments	12.503	3.758	6.550	1.005	333	24.149
Existing Invest to Save Budget not yet utilised	-	(1.248)	(2.500)	-	-	(3.748)
Additional CIL (2023/24 - 2024/25)	(5.002)	-	-	-	-	(5.002)
Redirection of 25% of Corporate Capital Contingency	(5.731)	(2.500)	(2.500)	(1.338)	-	(12.069)
Identified Underspends or Contingencies	(1.780)	-	(1.550)	-	-	(3.330)
Total Funding	(12.513)	(3.748)	(6.550)	(1.338)	-	(24.149)

*Funding profile reflects funding being released and held in finance budget and as such can vary across each year

13.5 Invest to save projects, new and emerging priorities amount to £24.149 million over the life of the capital programme. Alongside the project proposals coming forward, a funding review was undertaken. In total this has enabled £24.149 million of funding to be made available to meet these new priorities. This funding included project underspends, release of contingencies and further reprioritisation which identified the availability of additional CIL monies. A prudent redirection of c 25% of the capital corporate contingency was also included. The review identified underspends or contingencies that can be released totalling £3.330 million and are included above but split down to the detail in the table below.

Table 26: Identified Underspends & Contingencies

Identified underspends or contingencies that can be released	24/25 £m	25/26 £m	26/27 £m	Total £m
Western Harbour	(0.280)	-	-	(0.280)
Bristol Beacon	(1.500)	-	-	(1.500)
Metrobus	-	-	(1.550)	(1.550)
Total	(1.780)	-	(1.550)	(3.330)

- 13.6 A further phase (Phase 2) of ITS schemes, which includes property transactions for supporting Temporary Accommodation and Adult Social Care, continues to be explored.
- 13.7 The council's capital programme includes contingency to manage cost pressures that arise during the development of schemes as they progress through their lifecycle. A contingency is an important element of a capital programme size and complexity, and it is considered best practice to hold a contingency for unexpected events. During recent years the contingency level has been used to finance cost pressures that have arisen. Based on an assessment of risk, a sensible reduction to the general Fund contingency has been applied leaving £7.5 million per annum.
- 13.8 In accordance with the capital strategy governance process for managing schemes through their lifecycle, new schemes have been identified in Appendix 2 and have been classified as pending schemes, along with similar schemes identified in previous years, and do not form part of the formal capital programme until a full mandate has been completed. In the meantime, funding allocations and their timing are illustrative. Schemes may use the Feasibility Fund to develop their mandate in greater depth.
- 13.9 The most significant investment schemes in the capital programme 2024/25 to 2033/34 are set out in the table below:

Table 27: Capital Programme Most Significant Schemes

Most significant capital investment	24/25 £m
Investment in the Council's Housing Stock	2,300
Highways and traffic infrastructure	0.094
Delivery of new homes	0.050
Temple Meads Development	0.033
Bristol Avon Flood Strategy and Investment	0.020
TOTAL PRIORITY CAPITAL INVESTMENTS	2.497

- 13.10 The thorough review of the capital programme included an assessment of existing council funded (prudential borrowing and capital receipts) schemes which could utilise strategic Community Infrastructure Levy (CIL). To ensure compliance with the strategic CIL governance regulations, which require allocations to be approved against named schemes, the proposed Capital Programme includes approval for the following schemes:

Table 28: Community Infrastructure Levy (CIL) approved schemes

Strategic CIL Summary	Totals £m
Formally Allocated	
GR08 Bedminster Green Regeneration	(5.266)
PL30 Southmead/Glencoyne Regeneration	(7.277)
PL34 Lawrence Weston Community Hub	(0.650)
GR12 Bristol Avon Flood Strategy (BAFS)	(20.395)
CRF2 Youth Zones	(1.906)
NH02A Invest in Parks Sports Outdoor Equip & Facilities	(1.446)
GR10 Improvements to Local Centres	(1.465)
PL30 Housing Trinity Rd Police Facility/Guinness Partnership	(1.500)
Whitehouse Street Framework	(0.600)
Castle Park City Centre Delivery Plan	(1.200)
Full Council 2022/23 Budget Report - Awaiting Approval of Business Case	
GR11 Cribbs/Patchway New Neighbourhood Development (CPNN)	(1.000)
Full Council 2023/24 Budget Report - Awaiting Approval of Business Case	
GR07A Strategic Capital Fund - Transport	(1.400)
GR07A Strategic Capital Fund - Parks & Green Space*	(2.000)
* A plan for the Parks and Green spaces is going before cabinet in March 2024	
Full Council 2024/25 Budget Report – seeking approval	
Contribution to New Cut' Harbour walls	(5.002)
Total allocated	(51.107)

General Fund Capital Programme

13.11 The Capital Programme over the next ten years is fully funded through the use of external funding, capital receipts and borrowing where appropriate. A number of the schemes are earmarked only, with business cases pending approval. Should approval not be forthcoming, these funds may be redirected to ensure maximum available capital investment is targeted to works that begin to address the ambition to make Bristol a more equal, aspirational and resilient city, where everyone can share in its success. Further details on the refreshed rolling capital programme are contained in Appendix 2.

13.12 As noted above the council has significant capital investment requirements in its HRA housing stock, which includes regular planned maintenance and refurbishments to existing assets as well as programmes to deliver new housing stock. The capital programme includes the relevant aspects of the first 10 years of the 30 year HRA Business Plan model.

13.13 The council must ensure sufficient funding is available to meet the requirements of the agreed projects within its Treasury Management Strategy, which is reviewed annually and updated to reflect projects as they are refined or become ready for delivery. The Treasury Management Strategy is set out as Appendix 4 to this report.

13.14 The table and graphs below summarise our current capital spending plans for the next ten years that total £2.719 million. The detailed draft programme and its financing are set out in Appendix 2.

Table 29: Capital programme summary

23/24 £m	Description	24/25 £m	25/26 £m	26/27 £m	27/28 £m	28/29 to 33/34 £m	Total £m
5.633	Resources	2.658	0.534	-	-	-	3.192
131.219	Growth & Regeneration	146.713	67.278	28.577	16.610	14.000	273.178
0.998	Adult & Communities	7.803	5.851	-	-	-	13.654
16.539	Children & Education	40.587	13.580	8.179	0.050	0.050	62.446
3.845	Corporate	7.500	7.500	7.500	6.059	-	28.559
6.600	Pending Schemes	13.353	16.888	14.945	5.005	20.898	71.089
108.467	Housing Revenue Account	358.038	312.891	232.846	249.159	1,114.124	2,267.058
273.301	Total	576.652	424.522	292.047	276.883	1,149.072	2,719.176
	Financed by:						
52.655	Prudential Borrowing	73.721	36.892	6.650	4.044	1.550	122.858
62.845	Grant	72.462	26.138	21.665	3.500	3.500	127.265
12.917	Capital Receipts (GF)	16.088	11.406	12.712	6.560	1.998	48.764
4.364	Developer Contributions	17.110	14.000	5.225	4.620	18.900	59.855
0.007	Revenue/Reserves (GF)	-	-	-	-	-	-
32.046	WECA/Economic Development Fund	39.233	23.195	12.949	9.000	9.000	93.377
108.467	Housing Revenue Account	358.038	312.891	232.846	249.159	1,114.124	2,267.058
273.301	Total	576.652	424.522	292.047	276.883	1,149.072	2,719.176

HRA Capital Programme

13.15 The 10-year capital programme includes: Housing Investment Programme to maintain and improve existing stock; a baseline development programme; a small amount for HRA IT infrastructure and replacement of fleet.

Table 30: HRA capital budget summary

Ref	Description	23/24 P8 £m	24/25 £m	25/26 £m	26/27 £m	27/28 £m	28/29 to 33/34 £m	Total £m
HRA1	Planned Programme Major Works	50.213	95.979	110.950	92.980	80.407	406.399	786,715
HRA1	Fleet replacement	-	5.000	-	-	-	-	5.000
HRA2	New Build & Land Enabling	56.465	255.757	201.463	139.866	168.752	707.725	1,473.563
HRA3	HRA IT Infrastructure	1.789	1.302	0.478	-	-	-	1.780
GROSS HRA CAPITAL		108.467	358.038	312.891	232.846	249.159	1,114.124	2,267,058
Capital Financing								
	Capital receipts	(12.341)	(27.690)	(15.319)	(27.074)	(39.275)	(232.744)	(342.132)
	Capital Grants	(6.017)	(82.089)	(65.509)	(44.676)	(20.813)	(41.170)	(254.257)
	Prudential Borrowing	-	(185.218)	(185,945)	(115.669)	(150,906)	(572,193)	(1,209,931)
	Major Repairs Allowance	(34.160)	(31.535)	(32.165)	(32.809)	(33.465)	(215.322)	(345.296)
	Other Contributions	(3.140)	(4.789)	(5.939)	(8.700)	-	(9.400)	(28.828)
	Revenue Contribution	(52.809)	(25.915)	(8,013)	(3.917)	(4,700)	(43,265)	(86,612)
TOTAL FINANCING		(108.467)	(358.038)	(312.891)	(232.846)	(249.159)	(1,114.124)	(2,267,058)
NET HRA CAPITAL PROGRAMME		-	-	-	-	-	-	-

13.16 The HRA development programme (2024/25 to 2028/29) aims to deliver 3,082 additional council homes, requiring £946 million investment. This rolling programme will see:

- Approximately 2,544 new homes delivered by 2027
- A further 538 are anticipated by 2029.

13.17 The capital programme detailed above demonstrates the council's commitment to ensuring existing tenants homes are as safe, secure, warm and energy efficient as possible, as well as ensuring we continue to deliver new homes to help meet Bristol's housing crisis. However, we do acknowledge that such significant ambitions are subject to the constraints of market capacity to deliver. Market conditions will be kept under constant review during 2024/25. Where there are strong indications of insufficient market capacity, the capital programme will be reshaped and reprioritised to ensure we deliver as many new homes and provide as many existing tenants with safe, compliant and energy efficient properties as possible within those bounds.

13.18 The 2024/25 capital programme will be financed by a combination of contributions from major repairs and revenue reserves, capital receipts unapplied and external income (Homes England grant, income from sale of shared ownership and pooled Right to Buy receipts).

13.19 Capital receipts are from the sale of council homes under the Right to Buy (RTB) scheme to sitting tenants at a discount. Sales for 2024/245 are forecast to be 100, with an average sale price after discount of £128,000. The receipts will be reinvested to build new council homes, enabling a greater percentage to be retained.

Analysis of capital programme

Figure 3: Analysis of capital programme by investment principle

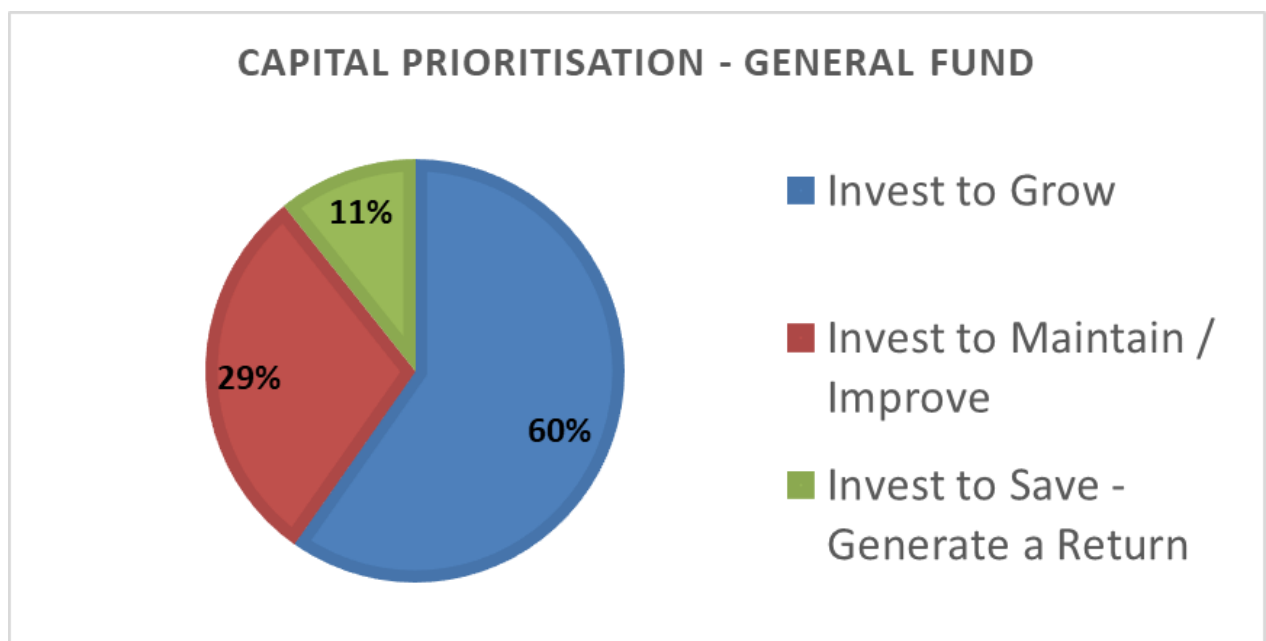
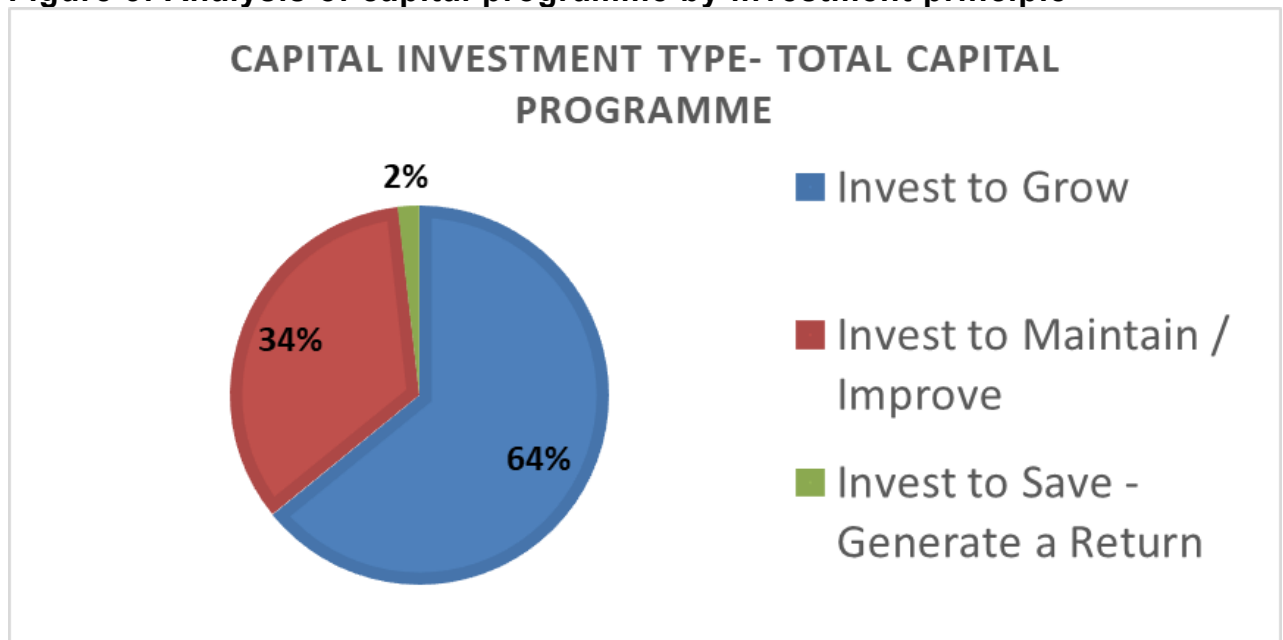
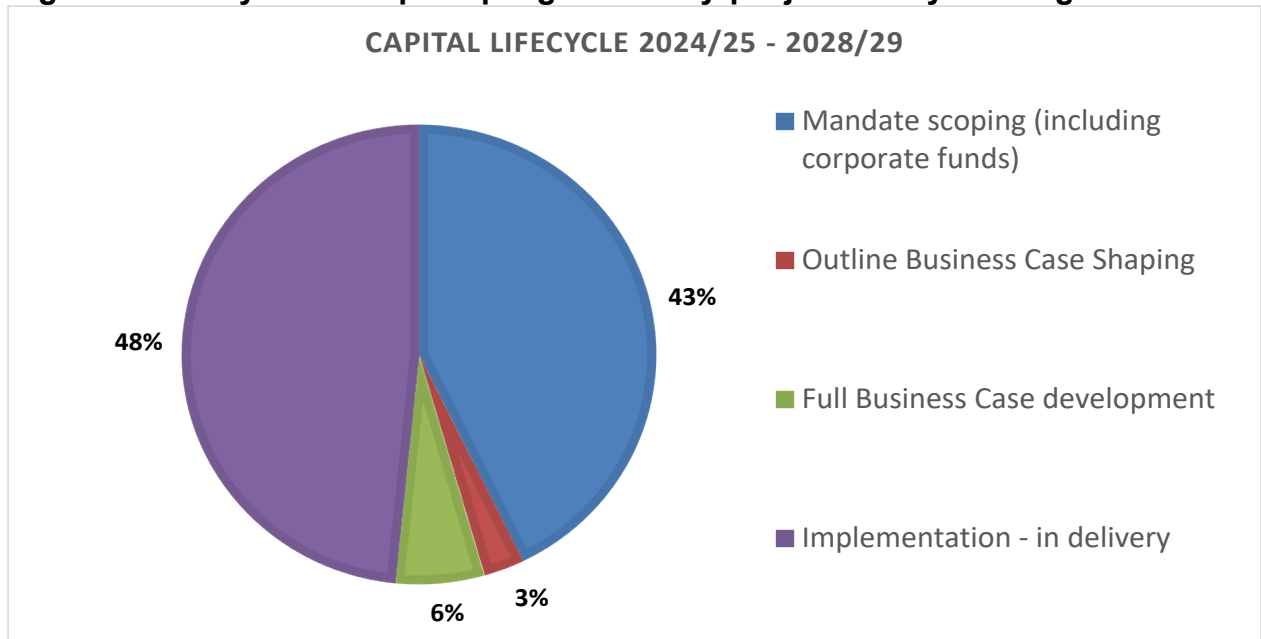


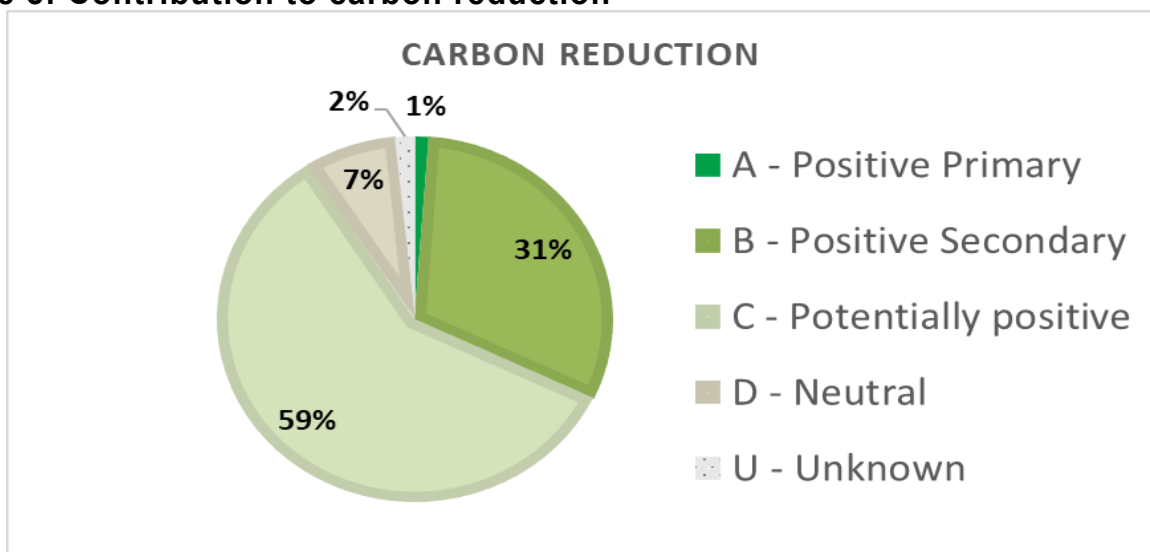
Figure 4: Analysis of capital programme by project lifecycle stage



13.20 The council is committed to reducing its carbon footprint. The chart below analyses the schemes in the Capital Programme according to their level of contribution to carbon reduction (analysis based on existing approved Capital Programme).

13.21 The analysis shows that 91% of the capital programme, by cost of scheme, is making a positive contribution towards carbon reduction. The 91% is broken down as schemes where the primary objective has a positive carbon impact (1%), schemes where the key objective is service delivery but has a positive carbon impact as a secondary objective (31%) and schemes where the primary objectives is service delivery but also have a potentially positive carbon impact (59%). It is anticipated in future years' capital programmes an even greater proportion of the council's capital investment is likely to have a positive impact towards reducing the council's carbon footprint in the city.

Figure 5: Contribution to carbon reduction



14 Treasury Management Strategy

- 14.1 The council's Treasury Management Strategy, Minimum Revenue Provision Policy, Investment Strategy and Prudential Indicators are set out in Appendix 4. The Treasury Management Strategy incorporates the council's Ethical & Equitable Investment Policy.

15 Reserves and Balances

- 15.1 The council holds reserves as part of its approach to maintaining a sound financial position and to demonstrate that there are no material uncertainties about the council as a going concern. The requirement for financial reserves is linked to legislation such as Local Government Act 1992, which requires councils to "have regard" to the level of reserves needed to meet future expenditure when calculating a budget.
- 15.2 The application and use of reserves supports the achievement of service delivery and improvements and can support any in year service budgetary pressures or budget pressures arising from funding reductions. The council's reserves policy is set out in the MTFP approved by Council October 2023 with a high level summary only outlined below.

General Reserve

- 15.3 The purpose of the council's General Reserve will be to meet costs arising from any unplanned or emergency events such as unforeseen financial liabilities or natural disasters. It also acts as a financial buffer to help mitigate against the financial risks the council faces and can be used to a limited degree to 'smooth' expenditure on a one-off basis across years.
- 15.4 Our General Reserve Policy is that an unallocated general reserve will be set at the commencement of each year of at least 5% to 6% of the net revenue budget, subject to the further analysis of the sensitivity and risks associated to the financial plans, and turnover days measure will be included, to provide a wider context of impact in a crisis.
- 15.5 The balance of the General Fund Reserve at 31 March 2024 is anticipated to be £28.52 million increasing to £32.0 million for 2024/25 (6.04% (22.0 days) of net revenue budget).

Table 31: General Fund assumptions as % of net budget and turnover days

23/24		24/25	25/26	26/27	27/28	28/29
£m		£m	£m	£m	£m	£m
(28.525)	General Fund Reserve @ 1 April	(32.000)	(33.000)	(33.750)	(34.500)	(35.250)
483.523	Indicative Net Budget Requirement	530.070	541.711	554.217	572.448	585.691
5.90%	General Fund % of net budget	6.04%	6.09%	6.09%	6.03%	6.02%
21.5	Turnover Days	22.0	22.2	22.2	22.0	22.0
	Indicative increase in reserve to maintain circa 6%	(3.475)	(1.000)	(0.750)	(0.750)	(0.750)

Earmarked Reserves

- 15.6 The purpose of the council's earmarked reserves is to meet identified spending commitments. These reserves will only be used for the purpose for which they were created and will be reviewed periodically but as a minimum annually.
- 15.7 The opening balance in earmarked reserves on 1 April 2023 was £126.611 million. Contribution in 2023/24 is expected to be £3.081 million, this is predominantly driven by business rates grants, agreed company loans, service and project resources.
- 15.8 The council is an extremely complex organisation with a wide range and diversity of activities and assets, interests and liabilities. By their nature many of the risks cannot be quantified and in this current challenging financial climate it is essential that the council maintains adequate levels of reserves.
- 15.9 The council's controllable reserves will be held corporately, and the use is subject to a prioritisation process and assessment of the use of the reserve for the approved purpose. Approval of the Section 151 Officer or Deputy Section 151 Officer is required in order to apply the use of earmarked reserves to support revenue expenditure. Each application will require a robust justification and will be assessed based on the planned and approved legitimate use of the reserve and the financial situation of the council at that time and may result in earlier decisions for funding being revisited and amended.
- 15.10 All reserves are to be reviewed at least annually to determine whether the original purpose for the creation of the reserve still exists and whether or not the reserves should be released, in full or in part, or require topping up based on known/expected calls upon them. Particular attention will be paid in the annual review to those reserves with balances that have not moved over a twelve-month period.

Table 32: Summary of budgeted movement in reserves

Reserve Type	Opening Balance 01/04/23 £m	Net Movement £m	Forecast Closing Balance at 31/03/24 £m	Forecast Movement £m	Forecast Closing Balance at 31/03/25 £m
Statutory / Ring-Fenced	(55.549)	(14.760)	(70.309)	5.435	(64.874)
Capital Investment	(38.582)	3.279	(35.303)	13.099	(22.204)
Financing	(1.808)	0.581	(1.227)	(10.349)	(11.576)
Risk and Legal	(14.172)	0.780	(13.392)	(3.511)	(16.903)
Service	(10.689)	3.263	(7.426)	5.527	(1.898)
Business Transformation	(5.811)	3.775	(2.036)	2.036	0.000
Earmarked Reserve Total	(126.611)	(3.081)	(129.692)	12.238	(117.455)
General Reserves	(29.525)	1.000	(28.525)	(3.475)	(32.000)
Total General Fund	(156.136)	(2.081)	(158.217)	8.762	(149.455)

Table 33: Reserve types

Reserve Type	Opening balances as at 01/04/23	Description
Capital Investment	(38.582)	The capital reserve is maintained to provide funding for the Council's capital and commercial investments.
Risk and Legal	(14.172)	Risk Reserves Funds set aside to mitigate risks not otherwise provided for as well as commission advice and mitigate risks of potential litigation/claims.
Statutory/Ring-Fenced	(55.549)	Amounts required by statute or accounting code of practice to be set aside and ring-fenced for specific purposes, e.g. Public Health Reserve, City Deal Business Rate Pooling.
Business Transformation	(5.811)	Amounts required for expenditure on business activities, projects and capacity that is critical to delivering the Councils' improvement agenda.
Financing	(1.808)	Includes PFI sinking fund, grant income carried forward in accordance with accounting regulations.
Service	(10.689)	Amounts set aside to finance specific projects or to meet known expenditure plans, for example election reserve for local elections.
Total Earmarked Reserves	(126.611)	Total General Fund earmarked reserves

New and Changing Reserves

15.11 In accordance with the policy on reserves, all forecasted balances to 31 March 2024 have been reviewed for their continuing need, alignment with council priorities and a risk assessment considering internal and external factors has been undertaken. In line with the council's reserve policy as set out in the MTFP, as part of setting the annual budget we will also identify any earmarked reserves which could be redirected to revenue if required during the year.

15.12 The following reserves have been reviewed and will be permanently released or realigned in line with the annual profile below. For completeness this includes the top-up to the General Reserve, the new reserves and the smoothing of reserves contributions to and from the general fund budget outlined at Table 1.

Table 34: Earmarked reserves - new or redirected

Reserve	Redirect / (New) in 24/25 £m	Redirect / (New) in 25/26 £m	Redirect / (New) in 26/27 £m	Redirect / (New) in 27/28 £m	Redirect / (New) in 28/29 £m	Total Redirect / (New) £m
Capital Investment Reserve	6.000	-	-	-	-	6.000
Goram Homes Investment & Returns	2.000	2.000	2.450	-	-	6.450
City Funds Investment & Returns	2.149	625	950	1.325	1.300	6.349
City Leap Procurement	200	-	-	-	-	200
BE Indemnity	-	1.635	-	-	-	1.635
Resilience Reserve	(596)	(6.461)	6.666	4.201	(2.986)	824
High Needs / SEND Transformation	(10.349)	(8.025)	(3.400)	-	-	(21.774)
Waste Contract Payment Mechanism	(1.034)	-	-	-	-	(1.034)
Insurance Fund B/S (Actuary)	(1.120)	-	-	-	-	(1.120)
Legal Reserve	(500)	-	-	-	-	(500)
GF Education Conversions	(260)	-	-	-	-	(260)
Total	(3.511)	(10.226)	6.666	5.526	(1.686)	(3.231)
General Reserve	(3.475)	(1.000)	(750)	(750)	(750)	(6.725)
Total (Budget Contribution)/Budget Requirement	(6.986)	(11.226)	5.916	4.776	(2.436)	(9.956)

15.13 Summary of each reserve movement:

- Capital Investment Reserve – this reserve covers non-treasury investments, eg loan provision cover, warranties and indemnities etc. A detailed assessment of the remaining loans and items now covered by the capital programme has enabled this redirection.
- Goram Homes Investment & Returns - This is the notional reductions to the Goram Homes pipeline reserves to reflect the intent and anticipated profile of anticipated release of profits to the shareholder, as outlined in more detail in Appendix 9.
- City Funds Investment & Returns – This redirect represents the recognition of repayments due on loans issued by the council.
- City Leap - This is the release of funds following completion of the city leap programme.
- BE Indemnity – Transfer residual to resilience reserve following expiration of indemnity.
- Resilience Reserve - In line with its intended use, over the five year period the resilience reserve will smooth forecast budget funding changes, support Transformation projects including SEND.
- High Needs / SEND Transformation - The challenging forecasted position in relation to the school's reserve is covered in the DSG section of the report and within the Section 25 statement provided by the Section 151 Officer.

- Waste Contract Payment Mechanism - Uplift of reserve to facilitate the contractual payment mechanism for Waste.
- Insurance - the Council's Insurance Actuarial Review recommended that an upward adjustment be made to reflect the trend in increasing volume and value of self-insured claims.
- Legal - to replenish the legal reserve to cover exceptional cases outside of the revenue budget parameters.
- GF Education Conversions – to replenish the reserve, which ensures funds for conversion of schools.

Table 35: Estimated Annual Closing Balance on Reserves

	Estimate 31-Mar 23/24 £m	Estimate 31-Mar 24/25 £m	Estimate 31-Mar 25/26 £m	Estimate 31-Mar 26/27 £m	Estimate 31-Mar 27/28 £m	Estimate 31-Mar 28/29 £m
Earmarked Reserves	(129.692)	(117.455)	(125.809)	(117.426)	(112.301)	(115.288)
General Reserves	(28.525)	(32.000)	(33.000)	(33.750)	(34.500)	(35.250)
Total General Fund	(158.217)	(149.455)	(158.809)	(151.176)	(146.801)	(150.538)
Trading with Schools	(0.302)	(0.277)	(0.252)	(0.227)	(0.202)	(0.202)
Capital Reserves	(2.585)	(2.585)	(2.585)	(2.585)	(2.585)	(2.585)
DSG Reserve	56.076	76.179	96.023	108.444	114.213	111.184
Schools Balances	(0.070)	(0.070)	(0.070)	(0.070)	(0.070)	(0.070)
Total Schools Reserves	53.119	73.247	93.116	105.562	111.356	108.327
HRA Major Repairs Reserve	(10.000)	(10.000)	(10.000)	(10.000)	(10.000)	(10.000)
HRA General Reserve	(45.790)	(26.840)	(27.377)	(27.924)	(28.483)	(29.053)
Total HRA Reserves	(55.790)	(36.840)	(37.377)	(37.924)	(38.483)	(39.053)
Total All Funds	(160.888)	(113.048)	(103.070)	(83.538)	(73.928)	(81.264)

16 Financial Health Indicators

16.1 In developing the budget strategy for 2024/25 and the medium term, the council has been reflective of the outcomes of the CIPFA Financial Resilience Index as set out in the figure below and other financial benchmarking (noting the data used for this is for 2021-22).

Figure 6 : CIPFA Financial Resilience Index Results Breakdown for Bristol



16.2 It is essential to ensure the council manages its financial resilience to meet unforeseen demands and in doing so have considered the two pertinent areas identified as high risks to the financial resilience of the council compared to other similar authorities. These are the level of reserves and gross external debit.

16.3 Level of Reserves

The benchmarking analysis above shows that the council currently has reducing useable reserves. After an improvement across the period of the pandemic the council’s levels of reserves have moved into a higher risk boundary. The analysis when compared to both nearest neighbours and unitary authorities provides a consistent picture. This indicator is of high importance in terms of the council’s ability to respond to extreme shocks

Figure 7: Bristol City Council Level of Reserves (statistical near neighbours)



Figure 8: Bristol City Council Level of Reserves ((unitary authorities comparisons)



16.4 Gross External Debt

This indicates the Gross External Debt held by the council and is used to finance the council's borrowing liability known as its Capital Financing Requirement (CFR). It is a requirement of the CIPFA Prudential Code to set a CFR and link into the prudential indicators agreed by Council as part of its annual Treasury Management Strategy set out in Appendix 4.

Figure 9: Bristol City Council Gross External Debt Ratio (statistical neighbours)

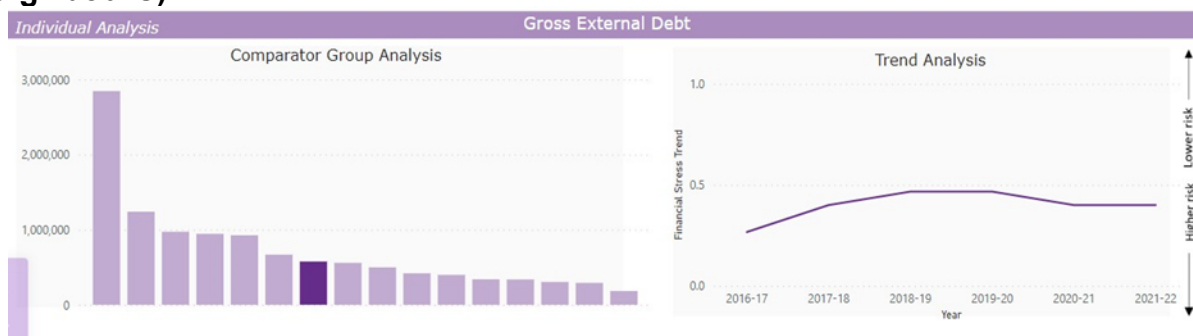
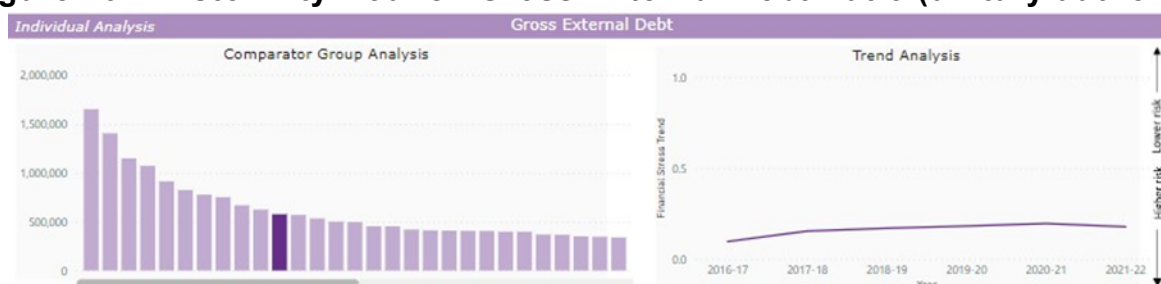


Figure 10: Bristol City Council Gross External Debt Ratio (unitary authorities)



16.5 Given the current position the intention the council should seek to retain a mid-point of all upper tier authorities as a percentage of net revenue expenditure and seek to leverage external funding and grants to provide the headroom and parameters for the additional capital amounts required to deliver the wider Corporate Strategy ambitions.

17 Section 25 Statement of the Section 151 Officer

Introduction

17.1 Section 25 of the Local Government Act 2003 requires that when a local authority is making its budget calculations, the Chief Finance Officer of the authority must report to the council on the robustness of the estimates made for the purposes of the calculations and the adequacy of the proposed financial reserves. An authority to which a report under this section is made has a statutory duty to have regard to the report when making decisions about the calculations in connection with which it is made. This includes considering:

- The key assumptions in the proposed budget and the robustness of those assumptions

- The key risk areas in the budget and to assess the adequacy of the council's reserves when reviewing the potential financial impact of these risk areas on the finances of the council
- 17.2 One of the Standards included in the Chartered Institute of Public Finance and Accountancy (CIPFA) Financial Management (FM) Code further reinforces the original requirement stating that the statement in relation to the proposed financial reserves should consider whether the level of general reserves is appropriate for the risks (both internal and external) to which the council is exposed. It is necessary to give reassurance that the authority's financial management processes and procedures are able to manage those risks and while the budget setting process continues to be on an annual basis, a longer-term perspective is essential if local authorities are to demonstrate their financial sustainability. Compliance must be demonstrated to the FM Code. This is a good practice approach that the council has followed historically, and the statement is updated considering the prevailing circumstances and assessment of relevant risks each financial year.
- 17.3 In setting the budget the council has a duty to ensure:
- It can continue to meet its statutory duties
 - Governance processes in place support effective decision making
 - The budget and medium-term plan reflect the significant challenges being faced and remain responsive to the uncertainties in the economy
 - Savings plans and the impact on service provision is clear and agreed savings are delivered
 - The profile of existing and forecast liabilities are understood and sufficient provision is made for repayment
 - The levels of reserves are appropriate and are closely monitored, including their liquidity to underpin its financial resilience
 - It prepares its annual statement of accounts in an accurate and timely manner to provide a sound platform upon which to build
- 17.4 Section 28 of the Local Government Act 2003 also imposes a statutory duty on the council to monitor during the financial year its expenditure and income against the budget calculations. If the monitoring establishes that the budgetary situation has deteriorated, the council must take such action as it considers necessary to deal with the situation. This might include, for instance, action to reduce spending across the council in the rest of the year, or to increase income, or to finance the shortfall from reserves.
- 17.5 The importance of this overall approach, need for prudence, and realistic levels of reserves and provisions, has been brought sharply into focus by the impact of the pandemic, more recently the cost of living crisis and the alarming fact that failure in local government, with disastrous consequences for residents, is no longer the rare occurrence that it once was.
- 17.6 The key assumptions underpinning this annual budget and medium term plan are outlined in the main body of the report and this statement considers key medium-term risk areas faced by the council and adequacy of reserves and provisions.

Assurance Statement

Key medium-term risks & issues faced by the council

- 17.7 The council is continuing to face a challenging set of sustained economic and financial issues related to local market conditions and the cost of living, that continues to put ever increasing pressure on the council's financial sustainability and resilience, which inevitably underpins key aspects of the council's future strategy.

Core Funding

- 17.8 The council's financial plans are heavily dependent on future government decisions which dictate local generated income streams such as business rates, council's tax levels and government grants. Whilst the calculations are based on robust methodology being applied by sector experts, it continues to be the case that it is difficult to anticipate the key decisions that the government will make on these matters.
- 17.9 As a result, a number of key elements of the council's medium term financial plans are subject to some uncertainty with a degree of risk that the position presented in this report could be subject to change once the details of these government decisions and local government funding reforms are published. The council has carried out sensitivity analysis to ascertain the levels of potential risk in the assumptions being used and has presented a realistic estimate for future years.

Flexible use of capital receipts

- 17.10 The Secretary of State announced on 18 December 2023 consultation on further flexibilities for capital receipts, including the ability to capitalise general cost pressures, allow councils to borrow for revenue costs, and sell investment assets used for rent or capital appreciation only. This is a radical contrast to the policy that local government should not borrow (take out loans) to pay revenue spending and ensure sustainability of core spending. The proposals are a mechanism to meet the higher public spending, which future extrapolations of need in demand led services indicate will be required. The council has used the current flexibilities in an appropriate manner to date in relation to delivering transformation programmes with a clear benefit realisation, and careful consideration will need to be given to risk exposure and the potential to encourage additional debt that may in the long term be unsustainable and could result in failures in meeting the best value duty.

Transformation and Savings Delivery

- 17.11 The General Fund Revenue budget relies on £39.3 million of savings and efficiencies, predominantly aligned to the 4 large transformation initiatives and external income. The HRA budget has similarly outlined a 3% efficiency target and supporting the DSG deficit to sustainability relies on the further development and delivery of the mitigation proposals currently estimated to deliver up to £58.6 million by 2028/29.
- 17.12 Many of the proposals are at varying degrees of development / complexity and have been developed with the support of commissioned delivery partners and industry experts. Optimism bias has been individually assessed and some proposals are

considered low risk or already certain. At the other extreme some proposals are considered challenging; in my opinion achievable but with a larger optimism bias provision provided. This will be subject to continuous review and in year monitoring as proposals are further developed and/or implemented. The outcome and overall assessment of this is reflected in the additional contingency provided across each fund for costs of delivery/optimism bias, along with the risks that propositions may be subject to change and/or removed following consultation.

- 17.13 The percent of savings delivered has demonstrated an improving trend over recent years and the importance of delivery is understood and considered at various programme boards. However, the principle of accountability needs to be further embedded, and the ability to drive pace, critically challenge and identify alternatives to recalibrate programmes that are off track will need to be strengthened. Strong leadership, culture change to one of ownership and delivery that starts with the executive team, directors and heads of service and cascades at all levels within the services, with sound monitoring of performance and demand forecasting, will be essential. I am satisfied that this is under review, however, should senior responsible officers not meet these targets to a value exceeding the contingency earmarked, it will be necessary for the council to draw on its reserves to balance the budget, as it closes each financial year.

Service Pressures

Adult Social Care

- 17.14 Between 2021/22 and proposed 2024/25, the amount budgeted for adult social care will have increased by £48.0 million, 32% (8% in real terms). With the additional ring-fenced government grant funding and investment from the social care precept to support demand and sustain the market, the service has had the investment required to transform its services. The transformation programme is focused on strength-based practice, reflecting the changing marketplace, supporting people to live independently and achieving better value outcomes. This is a long term programme and will require the ongoing support of an effective delivery partner, other internal partners including housing and children's, the right commissioning frameworks and with the culture of delivery embedded, the reforms planned to make the system truly sustainable for the future can be delivered.

Children's Social Care

- 17.15 Between 2021/22 and proposed 2024/25, the amount budgeted for children's social care will have increased by £38.2 million, 59.2% (32% in real terms). This sustained increase in children's social care spend continues to squeeze the budget available for other children's services and other areas of council spending. Difficulties with supply have been compounded by changes in placement mix and increase in unaccompanied children seeking asylum. Higher than usual numbers of foster parents are withdrawing, which has led to a shortfall in foster carers, resulting in greater use of residential, out of authority and other placement types.
- 17.16 Higher costs have been driven by both supply constraints and demand pressures. On the supply side, children's homes and other forms of residential care have fewer places available and there are material increases in market prices. The ongoing

impact of these pressures has been included as growth within the proposed budgets. The transformation programme is seeking to address these challenges with increased investment (revenue and capital) into placement provision, local early help and intervention with acute challenges. The delivery of the invest to save programmes and associated benefits will be key in turning the market curve and stabilising or changing these trends.

Education

17.17 Between 2021/22 and proposed 2024/25, the amount budgeted for general fund education will have increased by £15.6 million, 130% (89% in real terms). The council has faced unprecedented demand for home to school transport, coupled with increase service costs partly due to the lack of local education provision resulting in many more children traveling out of the authority area to access specialised education provision. These pressures are forecasted to exceed the benefits to be derived from the transformation proposals.

17.18 The ongoing impact of these pressures has been included within the proposed budgets, however if the trends are fully aligned with the future unmitigated trend of education, health and care plans and continue to require out of authority school transport, this would have a greater financial pressure than those outlined. The growth reflects existing trends only, with the assumption that the worst case scenario in this regard for 2027/28 and beyond is closely aligned to the DSG High Needs proposals and will be monitored accordingly.

Housing

17.19 Between 2021/22 and proposed 2024/25, the amount budgeted for housing and landlord services, will have increased by £8.6 million, 58% (30% in real terms). The pressures in the system are driven by multiple and interconnected sources. The cost of living crisis, increased pressure and competition with the Home Office for low cost accommodation and/or transfer of responsibilities for accommodation, private landlords leaving the market, increasing rent and local housing allowance frozen over several years results in subsidy losses and insufficient affordable housing to meet need.

17.20 No further growth has been assumed in the medium term beyond 2024/25 and the assumption is that the following measures, if effectively deployed, will assist in mitigating the challenges. The local housing allowance increase to the 30th percentile of market rents from April 2024, the announcement of a third round of the LA Housing Fund to support those in temporary housing need or to find a permanent home, and the existing transformation programme will need to focus on earlier intervention and preventative strategies to reduce demand and bring about a step change in the number of households, length of time spent and the number of children in temporary accommodation.

Dedicated Schools Grants (DSG) - Deficit

17.21 The DSG deficit is the most significant risks in the 2024/25 budget and medium term plan. The DSG deficit began to accumulate in 2019/20 with a carried forward balance at the time of £2.9 million, and at the end of 2021/22 the deficit on the DSG

adjustment reserve had increased to £24.5 million. The forecast position for the end of 2024/25 is £76.2 million. This reflects an increase of £51.6 million, between 2021/22 and 2024/25, 211% (156% in real terms). This is in the context of average annual funding increases of circa 11% for the high needs block.

- 17.22 The challenges in the SEND system within Bristol are significant, with substantial shortfall in local education provision. Demand for local SEND provision continues to increase at a faster rate than the change being implemented, and as such fundamental transformation is needed to deliver the scale of change required.
- 17.23 The route to improvement is continuous, with a need to look forward, self-challenge and learn from others. A whole council approach will be essential, encouraging shared responsibility across directorates and professionals. A 'high support' and 'high challenge' environment will assist in the retention of the core team. This will provide continuity in terms of contact with families, effective partnership working at both a strategic and operational level, creating shared goals and aspirations, which would assist partners in also buying into the improvement and mitigating strategies.
- 17.24 We have recognised that closing the annual gap over the period of the statutory override (that expires March 2026) will not be possible unless significant alternative funding is received, and as such we have built greater SEND delivery and transformation capacity into our medium term plan and greater resilience in general reserves and will need to ensure there are adequate usable reserves to cover any residual DSG deficit.

Early Years

- 17.25 The challenges facing the early years sector include the fact that DfE funding rates are lower than the cost of delivering funded places, increases in staffing costs, difficulties in recruiting and retaining staff and an increase in the number of children with formally identified SEND at their setting or who may have SEND that has not yet been formally identified.
- 17.26 In addition, the number and value of the maintained nursery schools' deficits have continued to increase. The additional funding from government in this regard, whilst welcomed, is forecast to be insufficient to ensure sustainability. The funding rates announced for 2024-25 will be vital to the success or failure of the expanded entitlements. However, whilst material rate increases are evident for 0-2 and 2 year olds the funding rates for 3 and 4-year-olds, who take up the bulk of provision and therefore determine the viability of the entire sector, are only increasing in line with inflation.
- 17.27 The nursery transformation programme will continue to seek to address a long-term wide ranging set of issues and ensure sustainability of the sector. Schools Forum has agreed funding to support the underwriting of deficits supported by endorsed recovery plans and with the additional funding from the DfE, licensed deficits are being progressed as appropriate. Progress updates will be incorporated with the finance reports to the Schools Forum and should also be incorporated in the council monitoring reports going forward. Further details per setting are outlined in Section 9 of the budget report.

Housing Revenue Account

17.28 The council has adopted an ambitious 30 year business plan and medium and long-term modelling (up to 30 years) which delivers the key priorities for the HRA, including a strategy to build social housing properties through the capital programme, as well as buy and bring back into use empty properties and to prioritise improving the energy efficiency of its least efficient homes. These investments are funded through the ring-fenced Housing Revenue Account (HRA), funded primarily by rental income received from tenants, with government support limited. The plan ensures decisions are made in the context of long-term impact on the business plan and the affordability thresholds. However, the challenges and emerging pressures have minimised the headroom available. The key risks are the implications of new legislation / regulation or housing policy change which will negatively impact decisions taken at a local level.

HRA Financial Pressures

- The interaction between inflationary pressures and rent setting policy – the government imposition of a 7% ceiling on rent increases at a time when CPI reached 10-11% for much of the year has meant that costs have risen heavily above income and the cap reduced recurrent investible income available to support the 30 year plan.
- New legislation / regulation or housing policy - the new proactive regulatory regime from the Regulator of Social Housing, improvements to the Decent Homes Standard (DHS), building and fire safety, will increase the investment needed into existing stock.
- A new policy for rents is due to be consulted on shortly - it is vital that the approach adopted in looking forward provides the additional resources eg by facilitating a mechanism for catch up funding to enable the new burdens to be appropriately funded.
- Risk of viability challenges - For new build developments with ongoing high construction inflation and new regulatory changes as outlined above, viability challenges are likely. These developments can be compared to the wider impact of housing sufficiency or key areas of need in the council services, which could deliver costs reductions with access to social housing. For example, social care, temporary accommodation, and benefits subsidy losses.

Capital

17.29 The council has set out ambitious capital plans and material increase in the programmes for 2024/25 and 2025/26, primarily in delivering urgent housing maintenance and improvements. The programme remains within the affordability thresholds established for all funds and plans to increase capacity is in hand. However early assessment will need to be undertaken regarding the following risks and issues that could delay the delivery of the programme and early recalibration of the programme will be required if evidenced:

- Internal and external delivery capacity - delays in recruitment of delivery partner, internal projects and procurement leads and labour shortages
- Failure to deliver capital receipts targets due to lack of pipeline to market
- Impact of global markets on inflation / interest rate exposure, materials and supply chain issues

17.30 An earmarked fund has been identified to support the implementation of the Invest to Save strategic improvement projects, which aim to deliver effective and improved citizen-centred public services, whilst delivering wider efficiency savings. These arrangements should be updated on an on-going basis to ensure that there is clarity on who, ultimately, is accountable for performance, the delivery of the fund activity over the agreed period, and the payback period that follows of not only the benefits realised but the associated borrowing costs. Processes will need to be in place to ensure that practice reflects fully these process disciplines, following approval of final business cases, to enable the initial investment to be recycled.

Pay Awards

17.31 The council is a Real Living Wage (RLW) employer and the Autumn Statement 2023 announced 10% - 12% increase in the National Living Wage (NLW) for 2024/25. This is likely to result in a further increase in the RLW. The National Employers and National Joint Council (NJC) unions (GMB, UNISON and Unite), will take this into account in the 2024/25 pay negotiations and seek to ensure a reasonable differential in the percentage difference in pay, between the lowest grade, the NLW and mid-point of the next pay band. The trade union branch's consultation closed on 16th January 2024, for the NJC pay claim for 2024/25, for members in local government and schools. The trade union side is proposing that the pay claim to be submitted to the National Employers should be the following:

1. An increase of 10% or £3,000, whichever is the greater
2. A commitment to reach a minimum rate of pay of £15 an hour over the next two years, with a clear plan for how this will be achieved
3. Reviews of the gender, ethnicity and disability pay gaps in local government

This should be viewed in the context of the prudent 5% which has already been reflected within the 2024/25 planning assumptions and presents a material risks to which adequate reserves will need to be available. Pay sensitivity is outlined in Table 37.

Non Treasury Investments

17.32 In considering the council's investments, and given current market conditions and volatility, it is good practice to regularly review and / or consider the following risks:

- Failure of related companies to deliver growth and/or profit targets in line with agreed business plans
- Risk that non treasury impact investments do not achieve the desired outcomes and that the investment may not necessarily be returned to the council

17.33 These have been reviewed for Bristol's investments with returns and/or loan repayments scheduled in the council's budget. This will be reported in the periodic investment reports and regular reviews should continue to be undertaken.

General Risk Approach

17.34 The significant budget risks have been identified above and suitable proposals are being put in place to mitigate against these risks where possible. The Corporate Risk

Register (CRR) is a live document which seeks to provide assurance to senior management and members that the council's main risks have been identified and that arrangements are in place to manage those risks within agreed tolerance. The council's wholly owned companies carry out their own individual risk assessments which are incorporated into the risk registers contained within the business plans, with the key significant strategic risks summarised in the council's CRR.

- 17.35 The council has adopted key prudency principles with target thresholds to enable uneven pressures to be effectively dealt with, and to provide cover against unforeseen events and pressures, which are closely monitored.
- 17.36 Appendix 3 – Budget Risk Matrix contains a summary of selected key strategic risks, extracted from the Quarter 3 CRR which provides further details in relation to the causes, impacts, and mitigating actions. This matrix provides an indicative assessment of how the risks identified in the CRR could be managed should they be realised during this medium term.
- 17.37 The council needs to be satisfied that it can continue to meet its statutory duties and meet the needs of vulnerable young people and adults. Proposals have been drawn up on the basis that Executive Directors and Directors are satisfied that this will enable them to continue to meet their statutory duties and the needs of the most vulnerable.
- 17.38 Where unavoidable pressures are identified during the course of the year that cannot be mitigated, collective ownership is taken, and where appropriate funds are held in abeyance (subject to mitigations or a supplementary estimate being agreed) to minimise significant variations to net approved budgets. Where budget savings are not achieved in a timely manner further savings will need to be identified for implementation. Where this is not practical or deliverable and reserves are called on to achieve a balanced position, the savings will be rolled forward in order to ensure the council's future financial stability is maintained.

General

- 17.39 There are exceptional risks which, should they crystallise, could significantly impact the council's reserves and leave its financial standing seriously in question. These include:
- The potential for unforeseen council owned infrastructure issues, fire safety and insurance risk
 - The potential exposure to cyber security
 - The financial implications from the Care Act, adult social care and other welfare reform changes
 - Risk of exposure to any major legal claims against the council
 - Future government changes in policy and funding for local government, particularly the unknown impact of the next Spending Round (2024) and the risk of further significant reductions in income, government approved funding in relation to business rates base and business rates appeals
 - School conversions to academies with deficit balances that revert to the council
- 17.40 The uncertainty regarding future funding for local authorities and inflationary risks makes a robust and evidenced assessment of financial governance and future

resilience critical. In considering the robustness of any estimates, the criteria in the table below have been assessed.

Table 36 : Assessment of robustness of estimates

Area	Y/N	Response
Is performance against the current year's budget on track and where variances are evident, ongoing and unavoidable, are they appropriately reflected in the plans?	N / Y	The economic and financial climate has resulted in the increase in demand and need for many council services, particularly social care, home to school transport, homelessness, SEND and housing maintenance and support and higher than budget assumptions across the council. The uncertainty and volatility re external market conditions and pricing have made in year mitigation plans a challenge for some service areas. Detailed monitoring and report have ensued, and ongoing or unavoidable pressures have been considered by EDM's, CLB, scrutiny and members and are included in the plan.
Are arrangements for monitoring and reporting performance against the savings plans robust?	Y / N	Monthly budget monitoring, including savings tracker. Governance via EDM, CLB, Delivery Executive, Cabinet and Scrutiny Commissions, however greater accountability required for early warnings and non-delivery. This has been partially addressed within performance frameworks but needs to be strengthened with greater accountability at the right level.
The reasonableness of the underlying budget assumptions	Y	The major assumptions used in the budget calculation have been examined, where practical benchmarked, associated risks assessed, and impact of sensitivity assessment reported in the section below.
The alignment of resources with the council's service and organisational priorities	Y	The corporate strategy has been refreshed and service planning exercise completed for 2024/25 aligned plans and available resources to the agreed corporate strategy priorities. Service plans are endorsed by directors, executive directors and relevant cabinet member(s)
A review of the major risks associated with the budget	Y	The council and its subsidiary companies' corporate and other risks have been reviewed, likelihood and impact assessed.
The availability of un-earmarked reserves to meet unforeseen cost pressures	Y	Unallocated general reserve is currently forecasted to remain at marginally above the minimum policy level of 5-6% net revenue budget and 22 turnover days, over the 5 year period. Funds have been directed to and from the resilience reserve across the 5 year period with a small amount retained for any greater than expected movement. An appropriate level of earmarked reserves is retained for known liabilities and risk exposure; and sufficient reserves retained for ringfenced funds. However, should this be insufficient, as a short-term emergency measure longer term earmarked reserves could be temporarily redirected and replenished.

Have realistic income targets been set and 'at risk' external funding been identified?	Y	The income aspects of the overall budget are calculated based on previous and current trends, taking into account known external factors and external funding changes extrapolated over the medium term. To provide greater clarity and aid earlier planning, fees & charges will be set based on PY Sept CPI for 2024/25 and future years. The one off and core revenue estimates including demand pressures and anticipated income lead to the calculation of the council tax requirement and the setting of the overall budget and council tax.
Has a reasonable estimate of demand cost pressures been made?	Y	
Have one-off cost pressures been identified?	Y	Yes, see above. In addition, risks and pressures are identified, provisions made where evidenced and/or mitigating opportunities explored, unavoidable pressures and service improvement investments are outlined within the appendix to this report.
Has a reasonable estimate of future income been made?	Y	Yes, for income streams material to the council's financial position. It is noted however that these are subject to future government funding decisions and as such present a degree of volatility and risk. A small change could have a material impact eg business rates and council tax. Trends have been obtained, analysed and extrapolated based on a range of scenarios, realistic scenario determined, and sensitivity tested.
Are arrangements for monitoring and reporting performance against the budget and savings plans robust?	Y / N	<p>Closure reports are provided for Delivery Executive, transformation programmes and key projects which include lessons learnt and embedded assurance is also provided by Internal Audit on a range of major programmes. Quarterly detailed reports are provided to Cabinet in relation to budget and savings delivery and full report on saving delivery forms part of the outturn report.</p> <p>Delivery capacity has been enhanced with commissioned delivery partners and greater alignment with finance to support transformation project delivery monitoring and reporting. Arrangements for demand forecasting need to be improved to enable early corrective action to be taken.</p> <p>The governance and monitoring of the delivery of the schemes in the capital programme have been revised as outlined in the Capital Strategy and feasibility funds established for proposition at early development stage prior to full entry to the capital programme. This still requires further embedding to reduce slippage and optimism bias within the programme and to see tangible changes in the delivery of capital projects.</p>

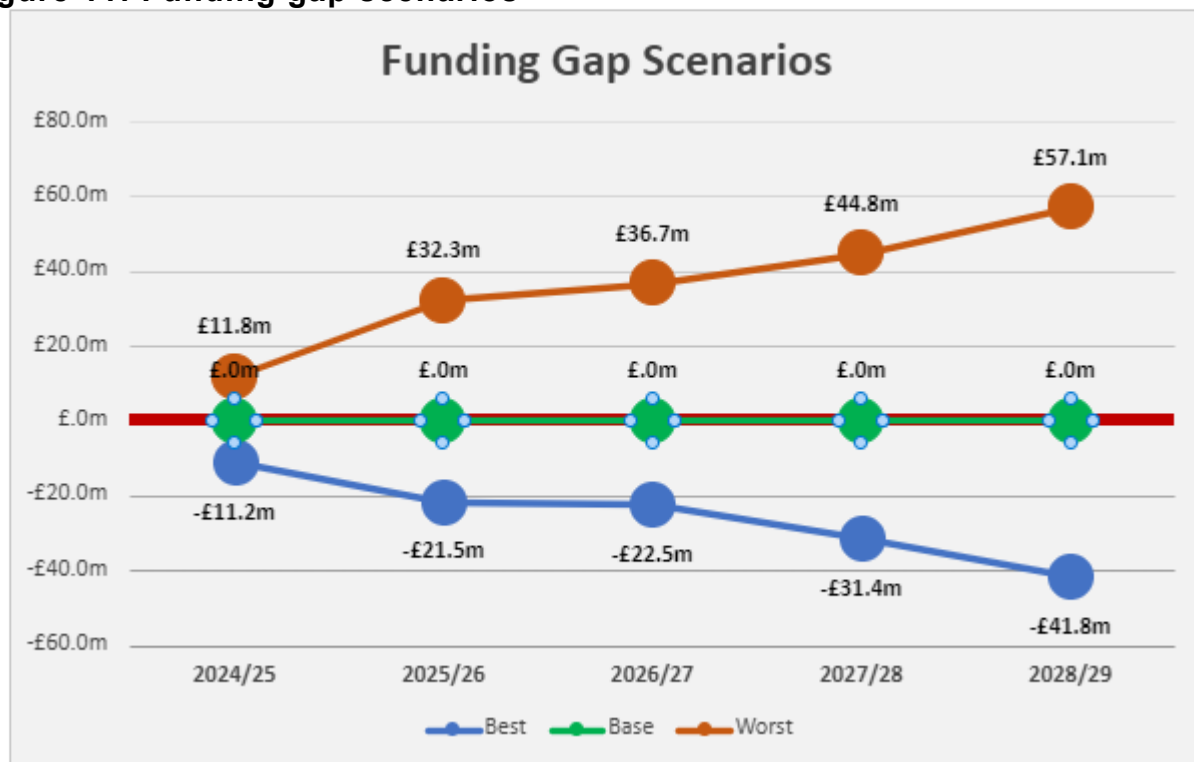
Is there a reasonable contingency available to cover the financial risks faced by the council?	Y	Reserves available for risk mitigations are outlined in Sections 15 & 17 and Appendix 3. In addition, a rolling capital contingency is established to reflect the major project risks and small revenue contingency set aside for non-delivery of savings which are in their infancy, requiring further due diligence or subject to consultation.
Is there a reasonable level of reserves, which could be used to mitigate any issues arising and are they reducing as the risks decrease?	Y	The policy relating to reserves was revised as part of the 2023/24 MTFP and the adequacy of the level of reserves is frequently assessed. It is reviewed periodically throughout the course of the year to check appropriate direction or released where no longer required or increased as necessary. Requests for new reserves are outlined in the budget or Cabinet report.
The strength of the financial management function and reporting arrangements?	Y / N	The council has made good progress in strengthening the Finance capacity via recruitment, development and commissioned reach back capacity. The implementation of the principles outlined in the FM Code and self-assessment indicated compliance, with some areas for improvement. The Annual Governance Statement and audits have identified some areas for improvement, eg investment methodology / financial modelling which we will continue to strengthen.
Has there been a degree and quality of engagement with colleagues and councillors in the process to develop and construct the budget?	Y	There has been widespread and practical engagement throughout the budget development and construction process with senior colleagues, executive, councillors, Mayor and scrutiny MTFP and budget task and finish group. The constructive critical challenge provided is always beneficial in sharing knowledge, testing assumptions and improving our reporting.

17.41 As a result of unprecedented economic and financial uncertainty there will undoubtedly be risks inherent in the budget process and it is important that these are identified, mitigated and managed effectively. These are outlined in the separate reports produced for each of the funds and summarised in the sections above.

Funding gap analysis

17.42 In relation to the General Fund, a balanced position has been proposed for each of the 5 years in the medium term plan. Sensitivity analysis has been carried out in relation to all the major assumptions used within the budget to ascertain the levels of potential financial risk in the assumptions being used. The scenarios indicate that under the worst case scenario the funding gap rises from £11.8 million in 2024/25 to £57.1 million by 2028/29. The key variation in this model for 2024/25 is driven by variations to the pay awards, inflation and recurrent service pressures. As the years progress, the principal variations are council tax, business rates and inflation. The key financial planning risks that may affect the projections over the medium term and delivery of a balanced budget are summarised above and in the relevant sections of the main budget report.

Figure 11: Funding gap scenarios



17.43 The table below illustrates the impact of any changes in standard key planning assumptions for any given year and potential impact on General Fund reserves should they come to fruition.

Table 37: Sensitivity analysis of key budget assumptions

Description	£m
Income	
Change in Council Tax collection rates by 1%	2.7
Change in Business Rates collection by 1%	2.5
Change in Council Tax growth by 1%	3.6
Changes in Government Funding Settlement by 1%	0.7
Expenditure	
Change in pay award by 1%	2.1
Change in general contract inflation by 1% (inclusive of fees and charges)	2.7

Assessment of the adequacy of the council's reserves

17.44 The council must ensure reserves and balances are retained at an appropriate level in order to provide an adequate buffer for any series of one-off pressures or to provide sufficient time to identify on-going mitigations in a systematic way. The council has a reserve policy and based on internal financial risks assessments

undertaken, I believe that the council still retains an adequate level of reserves as outlined in section 15.

- 17.45 General reserves are forecasted to be £28.5 million and earmarked reserves is forecasted to total £129.7 million by 31 March 2024 (excluding HRA and school balances) which in an emergency can be utilised on a short-term temporary basis, provided the funding is replaced in the future year. The budget proposes to uplift the general reserve to £32.0 million, which in a worst case scenario, combined with the earmarked reserves (£161.7m) would represent 31% of the 2024/25 net revenue budget.
- 17.46 Within the General Fund earmarked reserves, Public Health retains a reserve of £4.6 million, which represents approximately 12.8% of the annual grant and could provide transitional support should the grant be unexpectedly reduced, unfunded new burdens materialise or pay awards exceed expectation.
- 17.47 The HRA minimum general reserve is approved at £21.0 million (which reflects 3 months cashflow) and a further £5.0 million to reflect the current economic climate and risk exposure. The operating reserve is necessary to manage unexpected deficits, or for smoothing in-year budget pressures due to timing differences between the cost of building new homes and receiving rental income. The forecast reserve as at 31 March 2024 is £45.8 million (this excludes £10.0 million HRA major repairs reserve) with an interest cover ratio of 1:25. Whilst the funds underpin the 30 year business plan, they could be utilised on a short term basis for alternative pressures in the HRA, providing the funding is replenished and does not fall below minimum thresholds set.
- 17.48 Schools, like many businesses / organisations are experiencing the squeeze in relation to post pandemic, cost of living, inflation, energy, pay awards, recruitment and retention issues. The forecast reserve for 31 March 2024 reflects a worrying picture with a high volume of schools forecasting an in year deficit for 2023/24. The net forecast reserves balance for local authority maintained schools as at quarter 2 is envisaged to be a net deficit of circa £2.4 million at the end of 2023/24; indicating the need for close monitoring and an increased number of licensed deficits to ensure this is appropriately managed.
- 17.49 This is mitigated at the bottom line by £2.1 million attributed to additional funding earmarked by the council and Schools Forum to support schools whilst they recover their financial situations and additional funding allocated by the DfE to support schools in financial difficulty. After the reversal of legacy revenue contributions to capital for schools in deficit and removal of the deficit attributed to a school that has closed in year where the deficit will transfer to the general fund earmarked reserve, this leaves a small forecast positive but fragile variance of £0.1 million on the reserve. Schools block and early years funding in the DSG has increased by a welcome 8.9%, this may not be sufficient to mitigate the deficit in all schools and settings but should return the net position to a more favourable surplus.
- 17.50 I consider that the assumptions on which the budget has been proposed, whilst challenging, are manageable within the flexibility allowed by the contingencies and general and risk reserves. The fact that the council holds other reserves earmarked for alternative purposes that could be called on if necessary means that overall the

budget position of the council can be sustained within the overall level of resources available.

Conclusion

17.51 The short, medium and longer term issues and risks outlined in this statement, seek to raise the awareness of key issues and improve the understanding of members, officers and stakeholders, of the challenges for the council and risks to which I believe the council is exposed.

17.52 A culture of collective leadership is required, with clear accountability for the matters for which the council can control. This will ensure that key issues are successfully addressed and external factors that can be outside the council's control, effectively managed. Given the rigorous focus and work undertaken across the council and by members over last 6 months in developing the budget, I, as the council's Chief Finance Officer (Section 151 Officer), consider the estimates for 2024/25 to be sufficiently robust. I am also able to advise the council that the level of reserves remain adequate for all funds, providing a long term solution is identified for the DSG deficit, good governance prevails, risk is managed, and agreed savings are delivered and can recommend the budget for consideration by council.

Denise Murray
Chief Finance Officer (Section 151 Officer)

18 Consultation and Scrutiny Input

Internal consultation

18.1 Development of the MTFP and budget has been reviewed and challenged by a Task and Finish Group of the council's Resources Scrutiny from September 2023 to January 2024. The Resources Scrutiny commission plans to consider the budget proposals at meetings on 30 January 2024 and 1 February 2024.

18.2 Comments received from Overview and Scrutiny Management Board on individual matters arising will be incorporated in this report for Full Council.

External consultation

18.3 The consultation on the council's 2024/25 budget was open for six weeks from 9 November 2023 until 21 December 2023. The consultation set out alternative options for the level of Council Tax increase and Social Care Precept in 2024/25, before decisions on the 2024/25 budget are made by Full Council in February 2024. It also included information about 25 proposals to reduce costs and increase income to help balance the budget and described 11 'invest to save' ideas (ways to utilise capital investment to reduce costs in the long term).

18.4 The consultation was publicised through media, social media and communications with the public, including partner organisations, non-domestic rate payers and other stakeholders, a range of formats were available and utilised to boost response and responses from individuals and organisations were received via email, suggestion boxes and at events.

- 18.5 The final report summarising the result is attached at Appendix 6.
- 18.6 The council has not consulted separately on the HRA this year.
- 18.7 The council has consulted separately with schools and Schools Forum in relation to schools funding formula for 2024/25. This consultation was open for six weeks from 3 October 2023 until 14 November 2023. It was communicated to schools through the Service Director for Education & Skills' regular newsletter, email and through school forum members on 28 November 2023. This consultation sought school stakeholder views on the primary and secondary school funding formula for 2024/25. Details are as reported under Item 8 of the following document pack: [Bristol Schools Forum: 28/11/2023](#)
- 18.8 The council has consulted separately with early years settings in December 2023 on the basis of the Early Years National Funding Formula (EYNFF) and the results were considered at Schools Forum when agreeing the EYNFF rates and Early Years Block budgets for 2024/25.

Consultation principles for new proposals

- 18.9 The Mayor and Cabinet are keen to listen to any ideas for generating efficiencies and increasing income. Where it has been identified that further public consultation is required in relation to a new initiative or specific implementation of an existing proposition the opportunity will be provided to discuss with the city the details of exactly how the proposal could be delivered within the approved cash limits.
- 18.10 Principles:
- Where specific consultation is still considered necessary, Full Council will set the service cash limit but will not make decisions on operation issues within the service budget
 - Decision (and consultation) in respect of detailed operational proposals are a matter for Cabinet
 - Following Full Council, Cabinet will decide how best to allocate funds within the designated cash limits. When making decisions on specific proposals within budget lines it will take into consideration consultation responses and Equalities Impact Assessments where needed, fully recognising the constraints on any departure from the council's budget / financial plan
 - Services should ensure consultation is undertaken on defined proposals, giving consultees enough time and information to respond properly and that responses are considered. Informal engagement at a formative stage of proposals can also be beneficial.

19 Other Options Considered

- 19.1 Throughout the budget process, a large number of options are proposed and assessed in terms of opportunities, pressures, income generation, investments and risks, all of which need to be considered in the context of a balanced budget and appropriate level of reserves. This is a complex process with many iterations and possibilities too numerous to present as discrete options. This report presents the final overall package of detailed proposals, which together seek to balance the delivery of our strategic priorities and statutory and regulatory duties.

20 Public Sector Equality Duties

- 20.1 As part of this decision-making process, the Public Sector Equality Duty Decision requires council staff and elected members to consider what the impact will be on people with protected characteristics, whether in the wider city or in our own organisation and have due regard to the need to eliminate discrimination and advance equality of opportunity. We need to understand who will be affected, how they will be affected and, where possible, how to minimise unintended negative consequences by planning in mitigations from the start.
- 20.2 This report sets out the Mayor's budget proposals for Full Council to set the budget. Some proposals will need further development to make a specific decision. The process for this is set out in the section on consultation principles for new proposals (para 19.9). For these proposals an Equalities Impact Assessment (Appendix 7) will be undertaken to inform Cabinet when making that decision.

Proposed Budget 2024/25 - Full Council Summary by Division (General Fund)

Division	2024/25 Budget - Proposed						Notional		Proposed 2024 / 25 Budget After Notional Allocations	Savings as a Proportion of Directorate Base Budget 24/25
	Base Budget 2024 / 25	Virements	Fees & Charges	Growth	Savings and Efficiencies	Proposed 2024 / 25 Budget	Pay Award & National Insurance Contributions	Inflation		
	£000						£000s		£000s	%
Adult & Communities										
14 Adult Social Care	171,388	2,027	(767)	3,665	(10,933)	165,380	1,701	7,619	174,700	
34 Public Health Grant	0	0	0	0	0	0			0	
36 Communities and Public Health - General Fund	6,287	182	(9)	85	(75)	6,471	179		6,650	
38 Communities and Public Health - Other Grants	0	0	0	0	0	0			0	
57 Commissioning, Contracts Quality and Performance (A	14,293	3,549	(10)	6,841	0	24,672	94		24,766	
Adult & Communities	191,968	5,758	(785)	10,591	(11,008)	196,523	1,974	7,619	206,116	-5.7%
Children & Education										
15 Children and Families Services	83,898	2,797	0	14,996	(2,956)	98,735	1,763	2,840	103,338	
16 Educational Improvement	21,762	1,190	(31)	5,838	(2,359)	26,400	629	575	27,604	
Children & Education	105,661	3,987	(31)	20,834	(5,315)	125,136	2,392	3,415	130,943	-5.0%
Resources										
21 Policy, Strategy and Digital	21,240	732	(28)	35	(787)	21,192	936		22,128	
22 Legal and Democratic Services	14,793	1,174	(87)	1,054	(560)	16,375	969		17,344	
24 Finance	6,719	622	(3)	1,383	67	8,788	630		9,418	
25 HR, Workplace & Organisational Design	2,954	420	(3)	0	(125)	3,247	416		3,663	
26 Management - Resources	110	0	0	0	0	110			110	
Resources	45,817	2,948	(120)	2,472	(1,405)	49,712	2,951	0	52,662	-3.1%
Growth & Regeneration										
37 Housing & Landlord Services	21,015	635	(100)	3,000	(1,608)	22,943	642		23,585	
46 Economy of Place	2,941	413	(350)	0	(740)	2,264	987	2,138	5,389	
47 Management of Place	(2,800)	1,014	(2,281)	64	41	(3,962)	1,283		(2,679)	
4A Management - G&R	(338)	0	-	0	(3,290)	(3,628)			(3,628)	
4B Property, Assets and Infrastructure	39,167	1,542	(1,151)	3,374	0	42,932	419		43,351	
Growth & Regeneration	59,985	3,605	(3,882)	6,438	(5,597)	60,549	3,331	2,138	66,018	-9.3%
Corporate Funding & Expenditure										
X2 Levies	11,071	(204)	0	127	(10,300)	693			693	
X3 Corporate Expenditure	(4,320)	49,791	0	11,304	(370)	56,405	(10,648)	(13,172)	32,585	
X4 Capital Financing	23,738	3,031	0	0	0	26,769			26,769	
X8 Corporate Revenue Funding	(445,273)	(68,297)	4,818	(51,766)	30,448	(530,071)			(530,071)	
X9 Corporate Allowances	11,353	(617)	0	0	3,547	14,283			14,283	
Corporate Funding & Expenditure	(403,431)	(16,297)	4,818	(40,335)	23,325	(431,920)	(10,648)	(13,172)	(455,740)	
General Fund Total	(0)	0	0	0	0	0	0	0	(0)	

Proposed Budget 2024/25 - Directorate summary with savings

Directorate: Adult & Communities

Summary by Division		2024/25 Budget					Notional		Proposed 2024 / 25 Budget After Notional Allocations £000s
Division	Base Budget 2024/25	Virements	Fees & Charges	Growth	Savings and Efficiencies	Proposed 2024/25 Budget	Pay Award & National Insurance Contributions	Inflation	
	£000	£000	£000	£000	£000	£000	£000s		
14 Adult Social Care	171,388	2,027	(767)	3,665	(10,933)	165,380	1,701	7,619	174,700
34 Public Health Grant	0	0	0	0	0	0	0	0	0
36 Communities and Public Health - General Fund	6,287	182	(9)	85	(75)	6,471	179	0	6,650
3B Communities and Public Health - Other Grants	0	0	0	0	0	0	0	0	0
57 Commissioning, Contracts Quality and Performance (Adults)	14,293	3,549	(10)	6,841	0	24,672	94	0	24,766
Total Adult & Communities	191,968	5,758	(785)	10,591	(11,008)	196,523	1,974	7,619	206,116

Summary by CIPFA group (Account Type)		2024/25 Budget					Notional		Proposed 2024 / 25 Budget After Notional Allocations £000s
CIPFA description	Base Budget 2024/25	Virements	Fees & Charges	Growth	Savings and Efficiencies	Proposed 2024/25 Budget	Pay Award	Inflation	
	£000	£000	£000	£000	£000	£000	£000s		
1 Employees	42,342	3,887	0	85	(1,438)	44,876	1,974		46,850
2 Premises-Related Expenditure	338	2	0	0	0	340			340
3 Transport-Related Expenditure	256	0	0	0	0	256			256
4 Supplies & Services	10,407	6,677	0	7,381	0	24,466			24,466
5 Third Party Payments	242,272	5,023	0	3,125	(9,570)	240,850		7,619	248,469
6 Transfer Payments	20,259	0	0	0	0	20,259			20,259
7 Support Services	2,239	161	0	0	0	2,399			2,399
Expenditure	318,113	15,751	0	10,591	(11,008)	333,447	1,974	7,619	343,040
9A Income - Government Grants	(44,754)	(7,201)	0	0	0	(51,955)			(51,955)
9B Income - Other Grants/Reimbursements and Contributions	(61,384)	(212)	0	0	0	(61,596)			(61,596)
9C Income - Customer and Client Receipts	(1,128)	(50)	(785)	0	0	(1,964)			(1,964)
9E Income - Recharges	(18,835)	(1,815)	0	0	0	(20,650)			(20,650)
Income	(126,102)	(9,279)	(785)	0	0	(136,166)	0	0	(136,166)
N Income & Expenditure outside of Net Cost of Service	(29)	26	0	0	0	(4)			(4)
Other items outside of the Net Cost of Service	(29)	26	0	0	0	(4)	0	0	(4)
R Transfer to / from Reserves	(14)	(740)	0	0	0	(755)			(755)
Transfer to / from reserves	(14)	(740)	0	0	0	(755)	0	0	(755)
NET Expenditure	191,968	5,758	(785)	10,591	(11,008)	196,523	1,974	7,619	206,116

Savings proposals within Adult & Communities

Saving Name	Description	Savings £000	Savings Reference	Savings Cost to Deliver £000
Previous MTFP				
Increase social housing for people with care and support needs	Better Lives at Home is an innovative transformation programme for adult social care which supports people to lead more fulfilling lives and live independently in their own homes for longer. It boosts usage of TEC (technology enabled care). TEC equipment can be used at home to remain independent.	(870)	ASC1	
East Bristol Intermediate Care Centre	Following a recent review it is proposed to offer East Bristol Intermediate Care Centre to alternative providers, or close the centre. The Centre provides care and accommodation for 17 people over the age of 18 who stay for up to six weeks to help them to be independent after a hospital admission or illness. This is a discretionary service offered by the council.	(834)	2324P6	
Concord Lodge	To review and develop a more efficient and effective delivery model at Concord Lodge.	(104)	2324P7	
Review Bristol Community Links service delivery	Review of day opportunities currently provided within Bristol Community Links by developing options to deliver cost efficiencies. This is subject to consultation.	(500)	ASC7	
Current MTFP				
Complex homecare Reviews	Ensure all homecare packages provide the right support. We would review more people who receive care and support in their home and have not had a social care review within the last year, to ensure they receive the amount and type of care and support that is appropriate to their needs and are enabled to be as independent as possible. For example, by enabling people's independence through the use of technology and / or equipment we would spend less on direct care and support provided by our teams. Reviews would be based on an individual's personal strengths, including their social and community networks, in order to promote their wellbeing and independence.	(600)	2324_A001	
Residential Reviews Contract Management	Review contract management with residential and nursing care providers. We would improve the way we pay external organisations to provide residential and nursing care services on our behalf, to ensure the services we provide are funded fairly, are affordable and represent good value. This better management of contracts and expenditure will enable us to spend less while providing the same level and quality of service to people who need residential or nursing care services.	(675)	2324_A003	
Transitions Contract Management & Income	Review contract management with providers of care and support to young people transitioning from children's services. We would improve the way we pay external organisations to provide care and support to young people who have transitioned from children's services, to ensure the services we provide are funded fairly, are affordable and represent good value. This better management of contracts and expenditure will enable us to get better value while providing the same level and quality of service to people who need care and support to access employment, independent living, community and wellbeing services.	(1,148)	2324_A004	
Focused Reviews: Increase capacity & prioritisation	Increase reviews of care and support plans. Increase the number of care and support plans which have been reviewed by a social care practitioner within the last year. This will be achieved by improving systems to identify and complete timely reviews and where possible, support approaches which focus on an individual's personal strengths including social and community networks in order to promote their wellbeing and independence.	(630)	2324_A006	73
Optimising Reablement	Improve Reablement - We would improve the way Reablement Teams work so that more people would be able to receive Reablement. This would mean that more people go on to achieve improved independence, resulting in the need for less care and therefore reduced costs. Reablement helps individuals to learn or re-learn the skills necessary to be able to engage in activities or occupations that are important to them.	(938)	2324_A007	110
Reviews of those receiving Section 117 aftercare	Increase reviews of those receiving Section 117 aftercare. More people who receive Section 117 Mental Health aftercare services (free help and support provided to those after they leave hospital having been detained there under the Mental Health Act) are reviewed within one year of them leaving hospital. This would support and improve independence, resulting in the need for less care and therefore reduced costs.	(1,350)	2324_A008	157
Healthwatch and Communities saving	Communities programme. This budget supports the capacity of the city council's community development team. To make this saving we would not deliver any new community development programmes in 2024/25 (subject to consultation where required). Current ongoing initiatives will continue.	(75)	2324_A009	
Housing Related Support Review	Review housing related support. Review how we would provide the support which helps people stay living independently in their homes. By undertaking Care Act eligibility assessments for people who receive this service, we would ensure that we maintain support for those who are eligible in line with the Care Act 2014.	(1,785)	2324_A005	
Reducing demand: Hospital Reviews	Reduce the number of longer term care packages by increasing the frequency of reviews following a hospital visit. Where people have moved from hospital into residential or nursing care, we would increase the number of reviews carried out at six and twelve weeks following discharge from hospital. This will allow us to revise care packages and/or cease those that are no longer needed to ensure people receive care and support that is appropriate to their needs, while their independence continues to be supported and promoted.	(1,500)	2324_A002	
Total savings proposals		(11,008)		340

Investment proposals within Adult & Communities

	£'000
23/24 Pressures	
Demand and demographic growth	1,037
Environmental Health - Statutory Food Safety Inspections	85
Preparing for Adulthood - cost of care	355
New Burden: New Better Care Fund	2,095
24/25 Pressures	
New burden for transfer of care - first cohort	655
Core grants in service: market sustainability and the improvement fund	2,391
Core grants in service: adult social care discharge fund	622
Core grants in service: independent living fund	19
Core grants in service: market sustainability and the improvement fund - workforce fund	1,734
Total investment proposals	10,591

Proposed Budget 2024/25 - Directorate summary with savings

Directorate: Children & Education

Summary by Division		2024/25 Budget						Notional		Proposed 2024 / 25 Budget After Notional Allocations
		Base Budget 2024/25	Virements	Fees & Charges	Growth	Savings and Efficiencies	Proposed 2024/25 Budget	Pay Award & National Insurance Contributions	Inflation	
15	Children and Families Services	83,898	2,797	0	14,996	(2,956)	98,735	1,763	2,840	103,338
16	Educational Improvement	21,762	1,190	(31)	5,838	(2,359)	26,400	629	575	27,604
Total Children & Education		105,661	3,987	(31)	20,834	(5,315)	125,136	2,392	3,415	130,943

Summary by CIPFA group (Account Type)		2024/25 Budget						Notional		Proposed 2024 / 25 Budget After Notional Allocations
		Base Budget 2024/25	Virements	Fees & Charges	Growth	Savings and Efficiencies	Proposed 2024/25 Budget	Pay Award	Inflation	
1	Employees	52,884	2,630	0	2,205	0	57,719	2,392		60,111
2	Premises-Related Expenditure	826	(23)	0	0	0	804			804
3	Transport-Related Expenditure	9,916	403	0	5,838	(2,270)	13,886			13,886
4	Supplies & Services	4,279	84	0	0	(270)	4,094			4,094
5	Third Party Payments	65,616	757	0	8,225	(200)	74,398		3,415	77,813
6	Transfer Payments	550	0	0	0	0	550			550
7	Support Services	7,236	76	0	0	0	7,311			7,311
Expenditure		141,307	3,927	0	16,268	(2,740)	158,762	2,392	3,415	164,569
9A	Income - Government Grants	(7,037)	0	0	0	(58)	(7,095)			(7,095)
9B	Income - Other Grants/Reimbursements and Contributions	(3,831)	0	0	0	0	(3,831)			(3,831)
9C	Income - Customer and Client Receipts	(642)	(20)	(31)	0	(31)	(723)			(723)
9E	Income - Recharges	(17,563)	257	0	0	(27)	(17,332)			(17,332)
Income		(29,072)	237	(31)	0	(116)	(28,982)	0	0	(28,982)
N	Income & Expenditure outside of Net Cost of Service	(6,574)	(178)	0	4,566	(2,459)	(4,645)			(4,645)
Other items outside of the Net Cost of Service		(6,574)	(178)	0	4,566	(2,459)	(4,645)	0	0	(4,645)
NET Expenditure		105,661	3,987	(31)	20,834	(5,315)	125,136	2,392	3,415	130,943

Savings proposals within Children & Education

Saving Name	Description	Savings £000	Savings Reference	Savings Cost to Deliver £000
Previous MTFP				
Targeted Commissioning	Review and reduce spend on direct commissioning for Mentoring/Youth services, with a focus on maximising delivery outcomes through alternative routes, such as application of the Youth Zone.	(200)	2324N2	
Short Breaks	Review and reduce pooled budget spend by 10%. This will require further consultation and represents a change to S75 budget.	(270)	2324N3	
Pooled Budgets	Enable a one-off refund of pooled budgets.	100	2324N4	
Foster Carer Recruitment and Retention	Supporting Fostering Services to recruit and retain foster carers, with innovative approaches and strategies to encourage and support people with the right skills and experience, to come forward and offer some of our most vulnerable children an opportunity to experience a stable family life. This proposal would significantly increase our cohort of local foster carers and reduce the use of more expensive distant placements and the use of Independent Fostering Agencies	(1,284)	2324P11	
Social worker retention and recruitment	Increase retention of our experienced social workers so that we can reduce our spend on agency temporary social workers.	(220)	2324P15	
Home to Education Transport	Redesign the service to provide a more efficient Needs-led Statutory Home to School Transport Service, developing more sustainable travel options, including independent travel, for young people with Special Educational Needs and Disability aged 16-25.	(2,270)	2324P21	
Early Help in communities, including Children's Centres & Family Hubs	We are proposing to review how we provide Early Help in communities, including Children's Centres and Family Hubs. The aim is to bring together more services that can be delivered from a range of different local venues and increase the amount of outreach work and online support we are able to provide, reducing the spend on buildings and staffing costs.	(1,052)	2324P23	
Bristol Children's Homes	We will increase our available capacity of Council run children's homes. This will help us to try and reduce the number of children who are placed in expensive placements outside of the city, improving outcomes whilst reducing our overall expenditure.	(300)	2324P25	
Current MTFP				
Children's Homes	Bristol's children's homes increase the number of council run children's homes. This will help us reduce the number of children placed in more expensive placements outside of the city, and make sure children can stay close to local connections, such as school, friends and family.	597	2324_CE002	
Rebaseline F&C budgets	Review fees and charges. Review and realign the budgets for fees and charges across sources of income that have repeatedly outperformed their approved budgets in recent years.	(116)	2324_CEN001	
Recruitment & Retention of Foster Carers	Foster carer recruitment and retentionImplement an extended family peer support model for foster carers, including regular joint planning, training, and social activities. This is an alternative way of providing foster care, and the success has been evidenced nationally in attracting prospective carers and retaining our existing experienced carer community. This will improve the stability of fostering placements and strengthen the relationships between carers, children and young people, fostering services and birth families.	(100)	2324_CE001	107
Operating Model	This proposal covers the redesign for the Children and Education directorate which will contribute to a balanced budget by enhancing our operational delivery of services, improving quality of practice, retaining and developing the workforce, improving governance and quality assurance and working more effectively with partners. This builds on the transformation programme that focuses largely on changes to the Directorate, which were previously agreed by Cabinet, and are currently being implemented. The proposed redesign of the structure has also been informed by Local Authority Ofsted "health checks", Ofsted inspections, independent reviews and best practice.	(200)	2324_CE003	
Total savings proposals		(5,315)	0	107

Investment proposals within Children & Education

	£'000
23/24 Pressures	
Benefit from invest to save - Children's Placements demand and cost pressures	(1,195)
Bristol Children's home staffing and maintenance costs	250
Placement costs - additional children from 2023/24	1,296
Additional social workers to support increasing children's numbers	54
Phoenix court (reversal of one off funding)	(65)
Home to School Transport increased demand	51
Special Educational Needs support	385
Home to School Transport - price and volume	1,252
24/25 Pressures	
Prior year recurrent service pressures (Children)	12,123
Prior year recurrent service pressures (Education)	4,150
Probation checks & Local Authority Designated Officer (LADO) changes in guidance	84
Additional pressures from Child Support Agency (CSA) mandatory reporting requirements	54
Working Together implementation	64
Children's social care placement demand growth - additional children	328
Children in need - support for children at home	2,000
Total investment proposals	20,834

Proposed Budget 2024/25 - Directorate summary with savings

Directorate: Resources

Summary by Division		2024/25 Budget						Notional		Proposed 2024 / 25 Budget After Notional Allocations
Division		Base Budget 2024/25	Virements	Fees & Charges	Growth	Savings and Efficiencies	Proposed 2024/25 Budget	Pay Award & National Insurance Contributions	Inflation	
		£000	£000	£000	£000	£000	£000	£000s		£000s
21	Policy, Strategy and Digital	21,240	732	(28)	35	(787)	21,192	936	0	22,128
22	Legal and Democratic Services	14,793	1,174	(87)	1,054	(560)	16,375	969	0	17,344
24	Finance	6,719	622	(3)	1,383	67	8,788	630	0	9,418
25	HR, Workplace & Organisational Design	2,954	420	(3)	0	(125)	3,247	416	0	3,663
26	Management - Resources	110	0	0	0	0	110	0	0	110
Total Resources		45,817	2,948	(120)	2,472	(1,405)	49,712	2,951	0	52,662

Summary by CIPFA group (Account Type)		2024/25 Budget						Notional		Proposed 2024 / 25 Budget After Notional Allocations
CIPFA description		Base Budget 2024/25	Virements	Fees & Charges	Growth	Savings and Efficiencies	Proposed 2024/25 Budget	Pay Award	Inflation	
		£000						£000s		£000s
1	Employees	56,224	4,598	0	807	(550)	61,079	2,951	0	64,029
2	Premises-Related Expenditure	1,508	30	0	0	0	1,538			1,538
3	Transport-Related Expenditure	615	341	0	0	0	956			956
4	Supplies & Services	17,960	(26)	0	(23)	(50)	17,862			17,862
5	Third Party Payments	995	(3)	0	0	0	992		0	992
6	Transfer Payments	132,786	0	0	9	0	132,795			132,795
7	Support Services	686	(3)	0	0	0	682			682
Expenditure		210,775	4,937	0	793	(600)	215,905	2,951	0	218,856
9A	Income - Government Grants	(133,606)	(7)	0	724	0	(132,889)			(132,889)
9B	Income - Other Grants/Reimbursements and Contributions	(6,242)	(677)	0	0	(33)	(6,952)			(6,952)
9C	Income - Customer and Client Receipts	(2,908)	70	(120)	0	(85)	(3,043)			(3,043)
9E	Income - Recharges	(20,834)	(2,377)	0	0	(21)	(23,233)			(23,233)
Income		(163,590)	(2,992)	(120)	724	(139)	(166,117)	0	0	(166,117)
N	Income & Expenditure outside of Net Cost of Service	(623)	602	0	955	(766)	169			169
Other items outside of the Net Cost of Service		(623)	602	0	955	(766)	169	0	0	169
R	Transfer to \ from Reserves	(745)	400	0	0	100	(245)			(245)
Transfer to \ from reserves		(745)	400	0	0	100	(245)	0	0	(245)
NET Expenditure		45,817	2,948	(120)	2,472	(1,405)	49,712	2,951	0	52,662

Savings proposals within Resources

Saving Name	Description	Savings £000	Savings Reference	Savings Cost to Deliver £000
Previous MTFP				
City Innovation Team	Cease all activities and delete the City Innovation Team (which focuses on discretionary projects such as digital and smart city innovations)	(76)	2324R11	
IT Contracts	Review all of our spending on IT software and services across the entire council. Seek to reduce or cancel any non-essential contracts and services.	(310)	2324R12	
Networking, partnership and influence services	Review and possibly reduce or stop some services that focus on partnership working at home and abroad. This includes our work with national and international networks which focus on the role of elected Mayors.	(90)	2324R16	
Debt collection outreach	Reduce the temporary funding to the debt outreach programme, which worked with individuals in debt to the council, and instead improve sign-posting to specialist providers of debt advice in the city.	100	2324R22	
Mayor's Office	Reduce the amount of money we spend on staff and activities performed by the Mayor's Office with a deletion of this function from 2024-25 (upon the end of the Mayoral term) and identify opportunities for reductions in 2023-24	(425)	2324R7	
IT Service	Reduce the amount of money we spend on staff by restructuring and reducing our internal ICT service.	(290)	2324R9	
Democratic Engagement	Review of democratic engagement staffing structures in the context of the change to Council governance.	(50)	2324R2	
Current MTFP				
Professional Services & Consultancy Contract Rebate	Professional services We have procured a contract with Constella to deliver the council's professional services (including consultancy) requirements. Any secured contract delivered by Constella will earn a 0.2% rebate which will be returned to the council annually.	(33)	2324_R003	
Rebaseline F&C budgets	Review fees and charges. Review and realign the budgets for fees and charges across sources of income that have repeatedly outperformed their approved budgets in recent years.	(30)	2324_CEN001	
Increase income from an additional round of employee's Annual Leave Top Up scheme	Annual leave purchase scheme. We would raise income by offering an additional opportunity for employees to buy extra leave. Managers will consider requests carefully, in relation to business needs and the potential impact of additional leave on the service.	(75)	2324_R001	
Reduction in discretionary learning and development spend	To reduce discretionary spend on learning and development by £50,000. This will be done by prioritising funding for statutory or mandatory training and for learning and development that is in direct support of organisational priorities such as Equality and inclusion Leadership development, Health and wellbeing Performance and talent development	(50)	2324_R004	
Registry Office Fee Income - Ceremonies	Register Office. We would raise Register Office prices for 2024/25 in line with current market rates, including fees to hold a ceremony, for our registrars to attend, to license a venue, for couples to hold a date and for other event hire.	(76)	2324_R002	
Total savings proposals		(1,405)	0	0

Investment proposals within Resources

	£'000
23/24 Pressures	
Legal/Mortuary & Coroner contract, backlog and staffing cost	(58)
24/25 Pressures	
Prior year recurrent service pressures	507
Local Crisis Prevention Fund (LCPF) - household support for low income families	350
Additional phone lines required to ensure Payment Card Industry (PCI) compliance	35
Revenues income / debt collection	300
Leader's Office staffing	100
Committee Model staffing	300
Coroners - Deceased transport contract	123
Coroners - Histology & Toxicology contract	82
Core grants in service: local council tax support	724
Core grants in service: family annexe council tax discount	9
Total investment proposals	2,472

Proposed Budget 2024/25 - Directorate summary with savings
Directorate: Growth & Regeneration

Summary by Division		2024/25 Budget						Notional		Proposed 2024 / 25 Budget After Notional Allocations
		Base Budget 2024/25	Virements	Fees & Charges	Growth	Savings and Efficiencies	Proposed 2024/25 Budget	Pay Award & National Insurance Contributions	Inflation	
Division		£000	£000	£000	£000	£000	£000	£000s	£000s	£000s
37 Housing & Landlord Services		21,015	635	(100)	3,000	(1,608)	22,943	642	0	23,585
46 Economy of Place		2,941	413	(350)	0	(740)	2,264	967	2,138	5,369
47 Management of Place		(2,800)	1,014	(2,281)	64	41	(3,962)	1,283	0	(2,679)
4A Management - G&R		(338)	0	0	0	(3,290)	(3,628)	0	0	(3,628)
4B Property, Assets and Infrastructure		39,167	1,542	(1,151)	3,374	0	42,932	419	0	43,351
Total Growth & Regeneration		59,985	3,605	(3,882)	6,438	(5,597)	60,549	3,331	2,138	66,018

Summary by CIPFA group (Account Type)		2024/25 Budget						Notional		Proposed 2024 / 25 Budget After Notional Allocations
		Base Budget 2024/25	Virements	Fees & Charges	Growth	Savings and Efficiencies	Proposed 2024/25 Budget	Pay Award	Inflation	
CIPFA description		£000	£000	£000	£000	£000	£000	£000s	£000s	£000s
1 Employees		67,184	3,196	0	0	0	70,381	3,331		73,712
2 Premises-Related Expenditure		28,474	(1,024)	0	1,550	0	29,000			29,000
3 Transport-Related Expenditure		2,166	(1)	0	0	0	2,165			2,165
4 Supplies & Services		11,234	143	0	1,864	0	13,063			13,063
5 Third Party Payments		75,747	338	0	24	224	76,333		2,138	78,471
6 Transfer Payments		7,375	203	0	0	(1,226)	6,352			6,352
7 Support Services		9,910	1,806	0	0	(330)	11,386			11,386
8 Depreciation and Impairment Losses		15	0	0	0	0	15			15
X Capital Financing Costs		652	0	0	0	0	652			652
Expenditure		202,857	4,661	0	3,438	(1,590)	209,367	3,331	2,138	214,836
9A Income - Government Grants		(9,498)	(951)	0	0	0	(10,449)			(10,449)
9B Income - Other Grants/Reimbursements and Contributions		(3,518)	171	0	0	0	(3,347)			(3,347)
9C Income - Customer and Client Receipts		(84,862)	(9)	(3,882)	0	(65)	(88,817)			(88,817)
9E Income - Recharges		(40,620)	(268)	0	0	(652)	(41,540)			(41,540)
Income		(138,498)	(1,057)	(3,882)	0	(717)	(144,153)	0	0	(132,100)
N Income & Expenditure outside of Net Cost of Service		(4,238)	0	0	3,000	(3,290)	(4,528)			(4,528)
Other items outside of the Net Cost of Service		(4,238)	0	0	3,000	(3,290)	(4,528)	0	0	(148,681)
R Transfer to I from Reserves		(136)	0	0	0	0	(136)			(136)
Transfer to I from reserves		(136)	0	0	0	0	(136)			(136,368)
NET Expenditure		59,985	3,605	(3,882)	6,438	(5,597)	60,549	3,331	2,138	66,018

Savings proposals within Growth & Regeneration

Saving Name	Description	Savings £000	Savings Reference	Savings Cost to Deliver £000
Previous MTFP				
Transport and Highway Maintenance	Access alternative income sources (some of which may be one-off) to pay for routine maintenance and improvements to sustainable transport and air quality to help improve health.	500	2324GR15	
City Transport discretionary activities	Reduce the City Transport budget by focussing on statutory areas and making reductions in discretionary activities, including transport studies, and reviewing our approach to income and expenditure on bus-shelters and bus-stops.	70	2324GR2A	
Temporary Accommodation need	We will reduce the costs of providing temporary accommodation to those with immediate housing needs. We will do this by creating new temporary accommodation, making use of existing properties, including council housing, and working with partners to source available properties. This will reduce our spend on expensive and inappropriate accommodation like hotels.	(821)	2324GR7	
New Parking Charges	New Charges for Small district Car Parks	(150)	2324N5	
Continue with the enforcement of the Bristol Bridge	Continue with the enforcement of the Bristol Bridge restrictions which will generate Penalty Charge Notices whilst encouraging motorists to move towards compliance	300	GR013	
Secure new commercial opportunities through	The conclusion of the Future Parks approach will secure new commercial opportunities for parks and green spaces.	(50)	GR021	
Maximise commercial opportunities for catering	Explore opportunities to maximise commercial growth in relation to catering outlets in Bristol's parks and green spaces.	(25)	GR022	
Review Museums and Archive Service	Review of the Museums and Archive Service in order to deliver the Corporate Strategy and to deliver savings.	(258)	GR028	
Reduce grant to Bristol Music Trust	Reduction of grant to Bristol Music Trust after substantial investment and opening of Bristol Beacon.	(276)	GR039	
Current MTFP				
Increase direct lets with Private Sector Landlords	Increase direct lets with Private Sector Landlords for Temporary Accommodation. We would reduce our reliance on our most expensive privately managed Temporary Accommodation, by renting properties direct from landlords. This would reduce costs associated with providing Temporary Accommodation. The council has a statutory duty to provide accommodation to people who are homeless, and either reach our vulnerability thresholds, or have dependent children, and where it hasn't been possible to prevent homelessness.	(405)	2324_GR009	124
Rebaseline F&C budgets	Review fees and charges. Review and realign the budgets for fees and charges across sources of income that have repeatedly outperformed their approved budgets in recent years.	(479)	2324_CEN001	
City Transport Resourcing	Charge more for City Transport work. We would use income from externally funded projects, where appropriate, to charge for staff time, and replace income from the general fund (the council's main revenue account). Make sure all charges for work are accurately recorded and job vacancies are filled.	(250)	2324_GR002	
HRA contribution to Head of Housing Delivery cost	Fund the Head of Housing Delivery role differently. The Head of Housing Delivery is currently funded by the general fund (the council's main revenue account). Due to the nature of the work, we would seek to fund 50 per cent of this position through the Housing Revenue Account (HRA). The HRA is funded by tenants' rents and leasehold service charges, and funds can only be used for services to tenants and leaseholders and the delivery of new homes. Given that the Head of Housing Delivery will oversee the planned increase in housing delivery it is appropriate that this role be part funded by the HRA.	(52)	2324_GR005	
City Transport Local Transport Schemes	Local Transport schemes. We would use net proceeds from Clean Air Zone charges to cover the costs of local transport schemes which support the Local Transport Plan such as yellow lines, crossings, dropped kerbs including staff costs.	(350)	2324_GR008	
Legible City advertising concession income	Reduce spend on Bristol Legible City. We would spend less money on the Bristol Legible City project. This means signage and wayfinding information that help people navigate the city would be updated less frequently and may not always have the latest information about new developments or transport. This may impact residents and visitors accessing the city centre.	(80)	2324_GR004	
Overhead contribution from a proposed new property licensing scheme	Create two new property licensing schemes. If new property licensing schemes are introduced following the current consultation process, we would increase income by introducing two new property licensing schemes. This new income would be used to expand the council's Private Housing team and cover the costs of running the service.	(330)	2324_GR006	
Maximising the Community Infrastructure Levy (CIL) administration recharge	Keep more of the administration fee from the Community Infrastructure Levy. The Community Infrastructure Levy (CIL) is money collected from new developments and used to fund local infrastructure. We would use the 5 per cent of this levy allocated to administration to replace money from the general fund (the council's main revenue account). This would be used to fund staff time spent supporting CIL work.	(150)	2324_GR001	
E-scooter concession	Use e-scooter payments for highway maintenance. Use new income from e-scooter operator payments to fund highway maintenance. This new income could also be used to support the use of bikes and e-scooters in the city.	(500)	2324_GR003	
H&T Swap out for CAZ	Use Clean Air Zone funds to maintain and improve the highways network. We would use net proceeds from Clean Air Zone charges to carry out repairs and improvement works on the city's roads and footpaths. These works would support the Local Transport Plan by keeping our roads and footpaths safe for all users, encouraging walking and cycling and reducing traffic congestion.	(2,311)	2324_GR010	
Total savings proposals		(5,597)	0	124

Investment proposals within Growth & Regeneration

	£'000
23/24 Pressures	
BWC - Transfer of additional waste efficiencies	29
BWC - Facilities Management net annual contractual efficiencies	(5)
24/25 Pressures	
Prior year recurrent service pressures (Energy)	1,550
Housing and Landlord Services - temporary accommodation demand	3,400
BWC - Waste growth and demand pressures	1,800
Increased kennelling costs	50
Core grants in service: food security enforcement	14
Total investment proposals	6,438

Proposed Budget 2024/25 - Directorate summary with savings

Directorate: Corporate Funding & Expenditure

Summary by Division		2024/25 Budget					Notional		Proposed 2024 / 25 Budget After Notional Allocations £000s	
Division	Base Budget 2024/25	Virements	Fees & Charges	Growth	Savings and Efficiencies	Proposed 2024/25 Budget	Pay Award & National Insurance Contributions	Inflation		
	£000	£000	£000	£000	£000	£000	£000s			
X2	Levies	11,071	(204)	0	127	(10,300)	693	0	0	693
X3	Corporate Expenditure	(4,320)	49,791	0	11,304	(370)	56,405	(10,648)	(13,172)	32,585
X4	Capital Financing	23,738	3,031	0	0	0	26,769	0	0	26,769
X8	Corporate Revenue Funding	(445,273)	(68,297)	4,818	(51,766)	30,448	(530,071)	0	0	(530,071)
X9	Corporate Allowances	11,353	(617)	0	0	3,547	14,283	0	0	14,283
Total Corporate Funding & Expenditure		(403,431)	(16,297)	4,818	(40,335)	23,325	(431,920)	(10,648)	(13,172)	(455,740)

Summary by CIPFA group (Account Type)		2024/25 Budget					Notional		Proposed 2024 / 25 Budget After Notional Allocations £000s	
CIPFA description	Base Budget 2024/25	Virements	Fees & Charges	Growth	Savings and Efficiencies	Proposed 2024/25 Budget	Pay Award	Inflation		
	£000						£000s			
1	Employees	2,490	0	0	0	0	2,490	(10,648)		(8,158)
4	Supplies & Services	1,404	50	0	200	0	1,654			1,654
5	Third Party Payments	22,620	14,400	0	127	(10,300)	26,846		(13,172)	13,674
X	Capital Financing Costs	11,621	0	0	0	0	11,621			11,621
Expenditure		38,134	14,450	0	327	(10,300)	42,611	(10,648)	(13,172)	18,791
9A	Income - Government Grants	0	(7,032)	0	0	0	(7,032)			(7,032)
9B	Income - Other Grants/Reimbursements and Contributions	(3,290)	0	0	0	0	(3,290)			(3,290)
9C	Income - Customer and Client Receipts	0	0	0	14,103	0	14,103			14,103
9D	Income - Interest	(3,150)	0	0	0	0	(3,150)			(3,150)
Income		(6,440)	(7,032)	0	14,103	0	631	0	0	631
N	Income & Expenditure outside of Net Cost of Service	(400,783)	(77,732)	0	(15,689)	3,177	(491,026)			(491,026)
Other items outside of the Net Cost of Service		(400,783)	(77,732)	0	(15,689)	3,177	(491,026)	0	0	(491,026)
R	Transfer to \ from Reserves	(34,342)	54,017	4,818	(39,076)	30,448	15,865			15,865
Transfer to \ from reserves		(34,342)	54,017	4,818	(39,076)	30,448	15,865	0	0	15,865
NET Expenditure		(403,431)	(16,297)	4,818	(40,335)	23,325	(431,920)	(10,648)	(13,172)	(455,740)

Savings proposals within Corporate Funding & Expenditure

Saving Name	Description	Savings £000	Savings Reference	Savings Cost to Deliver £000
Previous MTFP				
Discretionary Rate Relief (#1)	Suspend the Council's discretionary rate relief scheme and the discretion to 'top-up' relief to 100% of the business rates due, following the required 12 months notice period. Eligible registered charities and other voluntary and community organisations will be restricted to mandatory relief of 80%.	(170)	2324R29	
Discretionary Rate Relief (#2)	Robustly administer the existing discretionary business rates relief policy ensuring that discretionary business rates relief is only paid to those organisations set out in the policy as eligible.	(200)	2324R30	
Current MTFP				
Transport Levy external funding swap incl subsidised buses	Alternative investment in sustainable transport. We would use net proceeds from Clean Air Zone charges to contribute to the amount of money we pay to the West of England Combined Authority for the annual Transport Levy which supports the Local Transport Plan, funding concessionary fares and other public transport related services.	(10,300)	2324_GR007	
Total savings proposals		(10,670)	0	0

Investment proposals within Corporate Funding & Expenditure

	£'000
Insurance Premium & Self Insurance Fund	1,500
PFI Education / Leisure Unitary Charge	2,000
Professional Fees - incl Accounts	500
SEND project delivery capacity	663
SEND transformation - corporate contribution	3,500
ASC Equal Pay Evaluation	1,227
Transformation project delivery capacity	6,140
23/24 Corporate Levies	4
24/25 Corporate Levies	123
Total investment proposals	15,657

Resources

2023/24	Ref	Scheme	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30 to 2033/34	Total
£000s			£000s	£000s	£000s	£000s	£000s	£000s	£000s
Information Technology									
500	RE01	ICT Refresh Programme	1,295	0	0	0	0	0	1,295
3,507	RE07	Digital Transformation Programme - Networks	871	524	0	0	0	0	1,395
560	RE08	Digital Transformation Programme	493	10	0	0	0	0	503
Legal & Democratic Services									
1,066	RE09	Expansion of Flax Bourton Mortuary	0	0	0	0	0	0	0
5,633	Resources Total		2,658	534	0	0	0	0	3,192

Growth & Regeneration

2023/24	Ref	Scheme	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30 to 2033/34	Total
£000s			£000s	£000s	£000s	£000s	£000s	£000s	£000s
FM Services									
2,793	PL21	Building Practice Service - Essential H&S	3,662	523	500	500	500	1,000	6,684
1,473	PL27	Vehicle Fleet Replacement Programme	1,208	0	0	0	0	0	1,208
Bristol Ops Centre									
443	NH06A	Bristol Operations Centre - Phase 2	0	0	0	0	0	0	0
Parks and Green Spaces									
1,883	NH02	Investment in parks and green spaces	2,263	406	0	0	0	0	2,668
54	NH02A	Invest in Parks Sports Outdoor Equipment & Facility Improvements	2,078	0	0	0	0	0	2,078
213	PL35	Harbour Operational Infrastructure	2,562	0	0	0	0	0	2,562

Economy of Place

1,223	CRF3	Covid Recovery Fund – Economic Infrastructure
6,026	GR01	Strategic Property – Temple Meads Development
7,600	GR03	Economy Development - ASEA 2 Flood Defences
2,492	GR08	Delivery of Regeneration of Bedminster Green
35	GR10	Improvements to Local Centres
1,965	PL01	Metrobus
182	PL02	Passenger Transport
11,620	PL04	Strategic Transport
2,266	PL05	Sustainable Transport
205	PL06	Portway Park & Ride Investment
435	PL11A	Cattle Market Road site re-development
19	PL17	Resilience Fund (£1m of the £10m Port Sale)
266	PL36	Investment in Markets infrastructure & buildings

Transport

1,004	PL09	Highways infrastructure - bridge investment
1,185	PL09A	Highways infrastructure - Cumberland Road Stabilisation Scheme
15,204	PL10	Highways & Traffic Infrastructure - General
6,750	PL10B	Highways & Traffic - Street Lighting (ITS)
148	PL10C	Transport Parking Services

Housing Delivery GF Programme

5,701	PE06C	Local Authority Housing Fund - Refugee Resettlement
13,983	PL30	Housing Delivery Programme
400	PL34	Community investment scheme (Lawrence Weston)

543	0	0	0	0	0	543
27,409	4,475	1,003	0	0	0	32,887
2,513	1,849	0	0	0	0	4,362
7,203	4,059	0	0	0	0	11,262
434	1,031	0	0	0	0	1,465
481	72	412	0	0	0	965
0	309	0	0	0	0	309
14,671	5,788	1,684	0	0	0	22,144
4,114	373	0	0	0	0	4,486
0	0	0	0	0	0	0
720	719	0	0	0	0	1,439
0	0	0	0	0	0	0
253	0	0	0	0	0	253
215	0	0	0	0	0	215
0	0	0	0	0	0	0
17,274	13,827	12,772	9,000	9,000	0	61,872
3,604	0	0	0	0	0	3,604
250	0	0	0	0	0	250
0	0	0	0	0	0	0
24,329	18,999	2,677	3,610	0	0	49,616
749	0	0	0	0	0	749

Clean Air Zone Programme

7,629	GR09	Clean Air Zone Programme
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Property, Assets and Infrastructure

122	GR05	Strategic Property - Hawkfield Site
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2,467	GR05A	South Bristol Light Industrial Workspace Redevelopment
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192	NH03	Cemeteries & Crematoria investment
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348	NH04	Third Household Waste Recycling and Re-use Centre
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505	PL20	Strategic Property
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22,469	PL24	Bristol Beacon
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Housing & Landlord Services - Private Housing

5,323	NH07	Private Housing
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Management of Place

12	NH01	Libraries for the Future
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Energy - Commercialisation

6,586	PL18	Energy services - Renewable energy investment scheme
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131,219	Growth & Regeneration Total	
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7,759	6,000	6,000	0	0	0	19,759
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0	0	0	0	0	0	0
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84	0	0	0	0	0	84
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830	0	0	0	0	0	830
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0	0	0	0	0	0	0
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43	28	29	0	0	0	100
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11,206	5,321	0	0	0	0	16,527
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3,500	3,500	3,500	3,500	3,500	0	17,500
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0	0	0	0	0	0	0
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6,759	0	0	0	0	0	6,759
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146,713	67,278	28,577	16,610	13,000	1,000	273,178
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Adult & Communities

2023/24	Ref	Scheme	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30 to 2033/34	Total
£000s			£000s	£000s	£000s	£000s	£000s	£000s	£000s
Public Health Division									
770	CRF1	Covid Recovery Fund – Community Improvements	1,944	1,285	0	0	0	0	3,230
0	NH05	Leisure Centres Operational Contract – Capital Investment	4,030	4,000	0	0	0	0	8,030
Adult Social Care & Transformation Programmes									
227	PE06B	Adult Social Care – Better Lives at Home Programme	1,829	565	0	0	0	0	2,394
998	Adult & Communities Total		7,803	5,851	0	0	0	0	13,653

Children & Education

2023/24	Ref	Scheme	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30 to 2033/34	Total
£000s			£000s	£000s	£000s	£000s	£000s	£000s	£000s
Education									
6,083	PE01	School Organisation/ Children’s Services Capital Programme	15,242	5,886	50	50	50	0	21,279
6,154	PE02	Schools Organisation/SEN Investment Programme	18,107	5,794	8,129	0	0	0	32,030
1,468	PE03	Schools Devolved Capital Programme	862	800	0	0	0	0	1,662
Children & Families									
1,600	CRF2	South Bristol Youth Zone	4,086	1,100	0	0	0	0	5,186
127	PE05	Children & Families - Aids and Adaptations	55	0	0	0	0	0	55
1,107	PE06	Children Social Care Services	2,234	0	0	0	0	0	2,234
16,539	Children & Education Total		40,587	13,580	8,179	50	50	0	62,447

Corporate Funding & Expenditure

2023/24	Ref	Scheme	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30 to 2033/34	Total
£000s			£000s	£000s	£000s	£000s	£000s	£000s	£000s
Capital Funding									
2,800		Bristol Waste	0	0	0	0	0	0	0
1,044	CP03	Corporate Contingencies	7,500	7,500	7,500	6,059	0	0	28,559
3,844	Corporate Funding & Expenditure Total		7,500	7,500	7,500	6,059	0	0	28,559
158,233	Capital Programme (GF) Total		205,260	94,743	44,256	22,719	13,050	1,000	381,029

Schemes Pending Business Case Development

(Schemes not formally part of the capital programme and subject to further approval once more detailed work has been undertaken. Funding allocations and profile between years are illustrative only).

2023/24	Ref	Scheme	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30 to 2033/34	Total
£000s			£000s	£000s	£000s	£000s	£000s	£000s	£000s
0	CP04	Invest to Save Fund	0	225	6,217	672	0	0	7,114
0	NEW - ITS	Children Homes sufficiency (ITS)	1,570	3,200	0	0	0	0	4,770
0	NEW - ITS	Fostering sufficiency (ITS)	333	333	333	333	333	1,665	3,330
0	CP05	Decarbonisation Fund	0	0	5,000	0	0	0	5,000
500	NEW	Decarbonisation Delivery Programme	6,000	5,500					11,500
0	GR07	Areas for Growth & Regeneration - <i>Illustrative schemes include Bristol Avon Flood Strategy, Frome Gateway, Green Infrastructure (inc tree planting & biodiversity improvements), and City Region Sustainable Transport Strategy</i>	500	780	0	0	0	6,000	7,280
0	GR07A	Strategic CIL Capital Funds - Transport and Parks & Green Spaces	0	500	1,000	1,000	900	0	3,400
0	NEW	Regeneration - Whitehouse Street Framework Infrastructure	100	500	0	0	0	0	600
0	NEW	Regeneration - City Centre - Castle Park Infrastructure	0	1,200	0	0	0	0	1,200
0	GR11	Cribbs/Patchway New Neighbourhood Development (CPNN)	0	1,000	0	0	0	0	1,000
0	GR12	Bristol Avon Flood Strategy & Investment	0	3,000	2,395	3,000	3,000	9,000	20,395
0	PL03	Residents Parking Schemes	0	650	0	0	0	0	650
0	PE10	Sports Capital Investment	350	0	0	0	0	0	350
6,100		Pressures as set out in the Cabinet Report	4,500	0	0	0	0	0	4,500
0		Pressures	0	0	0	0	0	0	0
6,600	Schemes Pending Business Case Development Total		13,353	16,888	14,945	5,005	4,233	16,665	71,089
164,834	Capital Programme (GF) including Corporate Contingencies & Pending S		218,614	111,631	59,201	27,724	17,283	17,665	452,118

Capital Funding - General Fund

2023/24 £000s	Source of Finance	2024/25 £000s	2025/26 £000s	2026/27 £000s	2027/28 £000s	2028/29 £000s	2029/30 to 2033/34 £000s	Total £000s
(39,509)	Prudential Borrowing	(49,953)	(30,708)	(6,397)	(4,044)	(550)	(1,000)	(92,653)
(13,146)	Prudential Borrowing – Economic Development Fund	(23,768)	(6,184)	(253)	0	0	0	(30,205)
(62,846)	Grants	(72,462)	(26,138)	(21,665)	(3,500)	(3,500)	0	(127,265)
(12,917)	Capital Receipts	(16,088)	(11,406)	(12,712)	(6,560)	(333)	(1,665)	(48,764)
(4,364)	Developer Contributions	(17,110)	(14,000)	(5,225)	(4,620)	(3,900)	(15,000)	(59,855)
(32,046)	WECA/LEP	(39,233)	(23,195)	(12,949)	(9,000)	(9,000)	0	(93,377)
(7)	Revenue and Reserves	0	0	0	0	0	0	0
(164,834)	Capital Funding - General Fund Total	(218,614)	(111,631)	(59,201)	(27,724)	(17,283)	(17,665)	(452,118)

Housing Revenue Account

2023/24	Ref	Scheme
£000s		
50,213	HRA1	Planned Programme - Major Projects
56,465	HRA2	New Build and Land Enabling
1,789	HRA4	HRA Infrastructure
0	HRA6	HRA Fleet Replacement programme
108,467	Housing Revenue Account Total	

2024/25	2025/26	2026/27	2027/28	2028/29	2029/30 to 2033/34	Total
£000s	£000s	£000s	£000s	£000s	£000s	£000s
95,979	110,950	92,980	80,407	72,229	334,170	786,715
255,757	201,463	139,866	168,752	180,532	527,193	1,473,563
1,302	478	0	0	0	0	1,780
5,000	0	0	0	0	0	5,000
358,038	312,891	232,846	249,159	252,761	861,363	2,267,058

HRA Financing

2023/24	Source of Finance
£000s	
0	Prudential Borrowing
(27,174)	Grants
(17,711)	Capital Receipts
(2,537)	Developer Contributions
(61,045)	Revenue and Reserves
(108,467)	Housing Revenue Account Total

2024/25	2025/26	2026/27	2027/28	2028/29	2029/30 to 2033/34	Total
£000s	£000s	£000s	£000s	£000s	£000s	£000s
(185,218)	(185,945)	(115,669)	(150,907)	(153,203)	(418,990)	(1,209,932)
(86,878)	(71,448)	(53,376)	(20,812)	(20,860)	(29,710)	(283,084)
(27,690)	(15,319)	(27,074)	(39,275)	(40,227)	(192,547)	(342,132)
0	0	0	0	0	0	0
(58,252)	(40,179)	(36,727)	(38,165)	(38,471)	(220,116)	(431,910)
(358,038)	(312,891)	(232,846)	(249,159)	(252,761)	(861,363)	(2,267,058)

2023/24	Capital Programme Budget Combined
£000s	
273,301	(GF + HRA) Totals

2024/25	2025/26	2026/27	2027/28	2028/29	2029/30 to 2033/34	Total
£000s	£000s	£000s	£000s	£000s	£000s	£000s
576,652	424,522	292,047	276,883	270,044	879,028	2,719,177

Appendix 3 Budget Risk Register Report

Corporate Risk Report Summary Page	Risk	Rating (as at Dec 2023)	Financial Impact		
			Y / N	£m	Choose Source
			Financial Impact Mitigation Cost	Cost Impact Potential to Mitigate Dec 23	
Risks					
Adult and Communities					
CRR56	Potential threat to the ASC Care Quality Commission (CQC) Assurance Preparedness and Rating	3x7=21	N	0.0	MA
CRR51	ASC may be financially unsustainable due to national and local pressures, leading to a failure to deliver statutory duties and budgetary control	3x7=21	Y	7.0	UR
CRR53	Increased social worker and occupational therapists vacancies and sickness rates may result in vulnerable adults care being comprised	4x5=20	N	0.0	MA
CRR10	Safeguarding Adults may be at Risk with Care and support needs.	3x7=21	N	0.0	MA
CRR39	Adult and Social Care major provider/supplier may fail to deliver as expected	3x3=9	Y	2.0	MA
Children and Education					
CRR55	Risk of children placed in unregistered provision which is unlawful.	4x7=28	N	0.0	MA
CRR9	Possible Failure of Safeguarding Vulnerable Children	3x7=21	Y	13.0	UR
CRR45	Potential failure to deliver statutory duty in respect of Children	4x5=20	N	0.0	MA
CRR54	Potential Threat of Financial Sustainability Of Nursery Schools	2x3=6	Y	1.7	EMR
Growth & Regeneration					
CRR48	We may not be able to meet the affordable housing needs of the City by failing to meet the Project 1000 Delivery targets.	3x7=21	Y	54.0	MA
CRR52	Failure to manage and evidence compliance with building safety obligations in HRA stock may lead to regulatory enforcement.	3x7=21	Y	0.5	UR
CRR5	Business Continuity and Operational Resilience May Not Be Effective	3x7=21	N	0.0	MA
CRR12	Emergency planning measures & resources may be overwhelmed by scope / scale of an emergency or incident faced by the council	3x7=21	Y	0.2	UR
CRR37	Homelessness and the subsequent cost of providing suitable affordable accommodation may affect long-term outcomes	4x5=20	Y	2.3	MA
CRR43	Lack of progress for Mass Transit may have on Impact on the city	4x5=20	N	0.0	MA
CRR41	Capital Portfolio Delivery May Fail	3x5=15	Y	0.5	MA
CRR18	Possible failure to deliver enough new homes to meet Mayoral and Annual Business Plan targets.	3x5=15	N	0.0	MA
CRR27	We may fail to Deliver the Capital Transport Programme	3x5=15	Y	15.0	MA
CRR58	Failure to maintain and replace the Highway and Traffic assets may lead to future budget shocks and potential injuries to the public	7x3=21	Y	9.0	CC
CRR59	Failure to deliver timely statutory planning decisions	5x4=20	Y	0.5	MA
Resources					
CRR13	Possible Financial Framework and Medium Term Financial Plan (MTFP) Failure	3x7=21	Y	5.0	EMR
CRR15	Possible In-Year Financial Deficit	3x7=21	Y	5.0	UR
CRR57	Possible procurement breaches and compliance with procurement rules & legislation	4x5=20	N	0.0	MA
CRR40	Potential Threat of Unplanned Investment in Subsidiary Companies	4x5=20	Y	2.0	EMR
CRR25	Possible Suitability of Line of Business (LOB) Systems Issues	4x5=20	N	0.0	MA
CRR7	Potential Cyber Security Issues	4x5=20	Y	5.0	UR
CRR4	Possible failure to Deliver an effective Corporate Health, Safety and Wellbeing Framework	3x5=15	N	0.0	MA
CRR26	Potential ICT Resilience Failure	2x7=14	N	0.0	MA
CRR29	Information Security Management System (ISMS)	2x5=10	N	0.0	MA
CRR49	Potential Impact of Weak Workforce Resilience	3x3=9	N	0.0	MA

CRR6	Potential threat of Fraud and Corruption	2x3=6	Y	1.0	MA
External Risks					
BCCC1	Flooding May Impact Public Safety	3x5=15	N	0.0	EMR
BCCC4	Possible increase in winter diseases including COVID-19 & Flu	4x3=12	Y	2.0	MA
BCCC5	Cost of Living Crisis may have major impact on Citizens and Communities	4x3=12	N	0.0	MA
Opportunities					
OPP01	Possible Impact of One City Approach	2x7=14	N	0.0	MA

Strategies to manage risk	
Definitions of the provision identified in the table above table by which risk will be managed	
MA	Mitigating Action – Strategic Directors / Directors to identify alternative measures to manage risks / opportunities within available resources and growth allocated as per budget report
CC	Corporate Contingency - due to its recurrent nature a corporate contingency has been set aside
EMR	Earmarked provision – the Council has set monies aside in an earmarked reserve or other provision to meet the estimated costs.
UR	Unallocated Reserve – Council would require drawing funding down from the unallocated General Fund balance to meet costs

Mitigation £m Dec 23
77.3
9.0
8.7
30.7
125.6

Treasury Management Strategy Statement

1 Background

- 1.1 The council is required to operate a balanced budget, which broadly means that cash raised during the year will meet cash expenditure. Part of the treasury management operation is to ensure that this cash flow is adequately planned, with cash being available when it is needed. Surplus monies are invested in low risk counterparties or instruments commensurate with the council's low risk appetite, providing adequate liquidity initially before considering investment return.
- 1.2 The second main function of the treasury management service is the funding of the council's capital plans. These capital plans provide a guide to the borrowing need of the council, essentially the longer-term cash flow planning to ensure that the council can meet its capital spending plans. This management of longer-term cash may involve arranging long or short-term loans or using longer term cash flow surpluses. On occasion any debt previously drawn may be restructured to meet council risk or cost objectives.
- 1.3 The contribution the treasury management function makes to the authority is critical, as the balance of debt and investment operations ensure liquidity or the ability to meet spending commitments as they fall due, either on day-to-day revenue or for larger capital projects. The treasury operations will see a balance of the interest costs of debt and the investment income arising from cash deposits affecting the available budget. Since cash balances generally result from reserves and balances, it is paramount to ensure adequate security of the sums invested, as a loss of principal will in effect result in a loss to the General Fund balance.
- 1.4 The Chartered Institute of Public Finance Accountants (CIPFA) defines treasury management as:
- “The management of the local authority’s borrowing, investments and cash flows, its banking, money market and capital market transactions; the effective control of the risks associated with those activities; and the pursuit of optimum performance consistent with those risks.”*
- 1.5 Whilst any commercial initiatives or loans to third parties will impact on the treasury function, these activities are generally classed as non-treasury activities (arising usually from capital expenditure) and are separate from the day to day treasury management activities.

Reporting Requirements – Capital Strategy

- 1.6 The CIPFA revised 2021 Prudential and Treasury Management Codes require, for 2024-25, all local authorities to prepare an additional report, a capital strategy report, which will provide the following:
- a high-level, long-term overview of how capital expenditure, capital financing and treasury management activity contribute to the provision of services.
 - an overview of how the associated risk is managed.

- the implications for future financial sustainability.

The aim of this capital strategy is to ensure that all elected members of the Full Council understand the overall long term policy objectives and resulting capital strategy requirements, governance procedures and risk appetite. Full Council approved the current Capital Strategy on 31st October 2023.

This capital strategy is reported separately from the Treasury Management Strategy Statement; non-treasury investments will be reported through the former. This ensures the separation of the core treasury function under security, liquidity and yield principles, and the policy and commercialism investments usually driven by expenditure on an asset.

Reporting Requirements – Treasury Management

- 1.7 The council is required to receive and approve, as a minimum, three main reports each year, which incorporate a variety of policies, estimates and actuals.
- I. **A Treasury Strategy including Prudential and Treasury indicators** (this report) - the first, and most important report covers:
 - the capital plans (including prudential indicators)
 - a minimum revenue provision (MRP) policy (how residual capital expenditure is charged to revenue over time)
 - the treasury management strategy (how the investments and borrowings are to be organised) including treasury indicators; and
 - an investment strategy (the parameters on how investments are to be managed).
 - II. **A Mid-Year Treasury Management Report** – this will update the council with the progress of the capital position, amending prudential indicators as necessary, and whether the treasury activity is meeting the strategy or whether any policies require revision.
 - III. **An Annual Treasury Report** – this provides details of a selection of actual prudential and treasury indicators and actual treasury operations compared to the estimates within the strategy.
- 1.8 The above reports are required to be adequately scrutinised before being recommended to the council. This role is undertaken by the Audit Committee and or Cabinet.
- 1.9 **Quarterly reports** – in addition to the three major reports detailed above, there is also provision for quarterly reporting (end of June/end of December) on Treasury/Prudential indicators, if required to do so. These additional reports do not have to be reported to Full Council but, there is an expectation that they will be appropriately scrutinised. This role is undertaken by the Audit Committee.

2 Treasury Management Strategy for 2024/25

- 2.1 The Treasury Management Strategy for 2024/25 covers two main areas:

Capital Issues

- The capital plans and the prudential indicators
- The minimum revenue provision (MRP) policy.

Treasury Management Issues

- current and projected treasury position
- treasury indicators which limit the treasury risk and activities of the council
- prospects for interest rates
- the borrowing strategy
- policy on borrowing in advance of need
- debt rescheduling
- the investment strategy
- creditworthiness policy; and
- policy on the use of external service providers.

These elements cover the requirements of the Local Government Act 2003, DLUHC Investment Guidance, DLUHC MRP Guidance, the CIPFA Prudential Code and the CIPFA Treasury Management Code.

- 2.2 The CIPFA Code requires the responsible officer to ensure that members with responsibility for treasury management receive adequate training in treasury management. This especially applies to members responsible for scrutiny with Treasury Management training planned in 2024.
- 2.3 The training needs of treasury management officers are periodically reviewed.
- 2.4 The council uses Link Group Treasury Services Limited as its external treasury management advisors. The council recognises that responsibility for treasury management decisions remains with the organisation at all times to avoid any undue reliance being placed upon our external service providers. All decisions will be undertaken with regards to all available information, including, but not solely, our treasury advisers.
- 2.5 The council recognises that there is value in employing external providers of treasury management services in order to acquire access to specialist skills and resources. The council will ensure that the terms of their appointment and the methods by which their value will be assessed are properly agreed and documented and subjected to regular review.
- 2.6 The scope of investments within the council's Treasury operations include the placing of residual cash from the council's functions in various products such as fixed term deposits, call accounts and money markets with a variety of financial institutions.

3 The Capital Prudential Indicators 2024/25 – 2028/29

- 3.1 The council's capital expenditure plans are the key driver of treasury management activity. The output of the capital expenditure plans is reflected in the prudential indicators, which are designed to assist members' overview and confirm capital expenditure plans.

Capital Expenditure

- 3.2 This prudential indicator is a summary of the council's capital expenditure plans, both those agreed previously, and those forming part of this budget cycle. The table also summarises how the capital expenditure plans are being financed. Any shortfall of

resources results in a borrowing need. Members are asked to approve the capital expenditure forecasts.

Table 1: Capital expenditure plan and financing

Capital expenditure £m	2022/23 Actual £m	2023/24 Estimate (P8) £m	2024/25 Estimate £m	2025/26 Estimate £m	2026/27 Estimate £m	2027/28 Estimate £m	2028/29 Estimate £m
General Fund	133	165	219	111	59	28	17
HRA	62	109	358	313	233	249	253
Total	195	274	577	424	292	277	270
Financed by:							
Capital receipts	26	31	44	27	40	46	40
Capital grants	78	129	215	134	94	38	38
HRA (Self Financing)	33	32	32	32	33	33	34
Revenue	5	30	27	8	4	5	4
Net financing need for year	53	52	259	223	121	155	154
General Fund	53	52	74	37	6	4	1
HRA	0	0	185	186	115	151	153

Note - the table above exclude arrangements such as service-concession contracts including Private Finance initiative (PFI) and finance leases that have their own financing / borrowing facilities.

The council's borrowing need (the Capital Financing Requirement)

- 3.3 The Capital Financing Requirement (CFR) is the total historic outstanding capital expenditure which has not yet been paid for from either revenue or capital resources. It is essentially a measure of the council's underlying borrowing need. Any capital expenditure above, which has not immediately been paid for, will increase the CFR.
- 3.4 The CFR does not increase indefinitely, as the minimum revenue provision (MRP) is a statutory annual revenue charge which broadly reduces the borrowing need in line with each asset's life, and so charges the economic consumption of capital assets as they are used.
- 3.5 The CFR includes any long-term liabilities (eg PFI schemes, finance leases). Whilst these increase the CFR, and therefore the council's borrowing requirement, these types of schemes include a borrowing facility and so the council is not required to separately borrow for these schemes. The council currently has £118 million of such schemes within the CFR.
- 3.6 The council is asked to approve the CFR projections below:

Table 2: Capital Financing Requirement projections

	2022/23 Actual £m	2023/24 Estimate (P8) £m	2024/25 Estimate £m	2025/26 Estimate £m	2026/27 Estimate £m	2027/28 Estimate £m	2028/29 Estimate £m
CFR – non housing	577	615	676	699	690	679	665
CFR – PFI/Lease schemes	118	109	100	91	82	74	67
CFR – housing	245	245	430	615	727	874	1,021
Total CFR	940	969	1,206	1,405	1,499	1,627	1,753
Movement in CFR	24	29	237	199	94	128	126
Net financing need for year	53	52	259	223	121	155	154
Less MRP & other financing (GF)	(29)	(23)	(22)	(23)	(24)	(23)	(22)
Less MRP & other financing (HRA)				(1)	(3)	(4)	(6)
Movement in CFR	24	29	237	199	94	128	126

Liability Benchmark

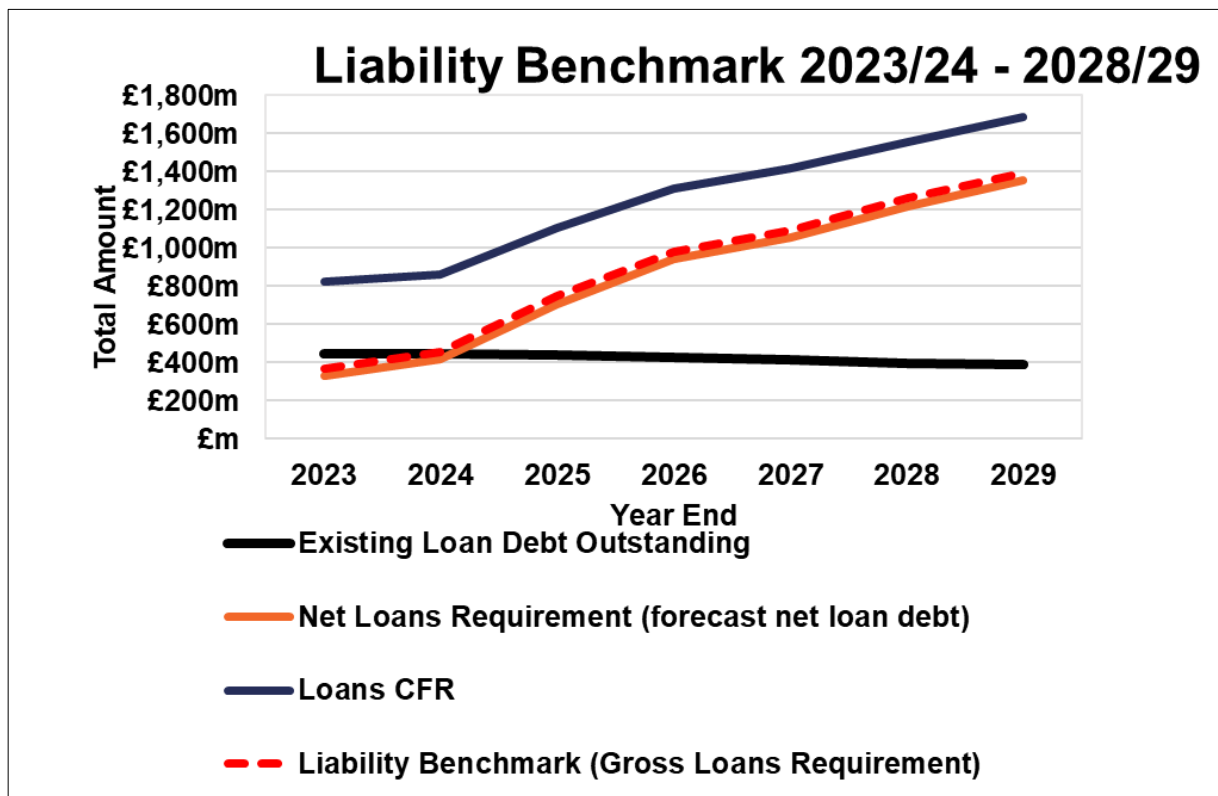
3.7 The Authority is required to estimate and measure the Liability Benchmark for the forthcoming financial year and the following two financial years, as a minimum.

There are four components to the Liability Benchmark: -

- **Existing loan debt outstanding:** the Authority's existing loans that are still outstanding in future years.
- **Loans Capital Financing Requirement (CFR):** this is calculated in accordance with the loans CFR definition in the Prudential Code and projected into the future based on approved prudential borrowing and planned Minimum Revenue Provision.
- **Net loans requirement:** this will show the Authority's gross loan debt less treasury management investments at the last financial year-end, projected into the future and based on its approved prudential borrowing, planned Minimum Revenue Provision and any other major cash flows forecast.
- **Liability benchmark** (or gross loans requirement): this equals net loans requirement plus short-term liquidity allowance.

The chart below sets out the four components of the Liability Benchmark.

Figure 1: Liability Benchmark



Minimum Revenue Provision (MRP) policy statement

- 3.8 The council is required to pay off an element of the accumulated General Fund capital spend each year (the CFR) through a revenue charge, the minimum revenue provision (MRP), although it is also allowed to undertake additional voluntary provision (VRP).
- 3.9 The Department for Levelling Up, Housing and Communities (DLUHC) has issued regulations which require Full Council to approve an MRP Statement in advance of each year. A variety of options are provided to councils, so long as there is a prudent provision. The council is recommended to approve the following MRP Statement:

For capital expenditure incurred before 1 April 2008 and capital expenditure incurred on or after that date which forms part of its Supported Capital Expenditure - The MRP policy will be based on the pre 2007/08 borrowing and post supported borrowing at 2% fixed so that the whole debt is repaid after 50 years.

Note a change in policy approved by Full Council on 13 December 2016 amended the rate that is used to calculate MRP from 4% reducing balance to 2% straight line as this is better aligned to the average lives of the authority's assets and results with the debt being fully repaid. This means that the authority has overprovided during the period 1 April 2008 through to 31 March 2016. The council has reduced its MRP provision in 2017/18 through to 2022/23 to recover this overprovision while also ensuring a prudent annual provision is maintained.

From 1 April 2008 for all unsupported borrowing (including PFI and finance leases) the MRP policy will be the asset life method – MRP will be based on the estimated life of the

assets, in accordance with the regulations (this option must be applied for any expenditure capitalised under a Capitalisation Direction);

Any loan or investment to an organisation defined as capital expenditure will not attract MRP. The original capital expenditure will be met from the capital receipt on the maturity of the loan/investment. However, where there is an expected credit loss or an impairment, the MRP policy will be to include a MRP charge of the same value.

Other methods to provide for debt repayment may occasionally be used in individual cases where this is consistent with the statutory duty to be prudent, as justified by the circumstances of the case, as determined by the Chief Finance Officer.

These options provide for a reduction in the borrowing need over approximately the asset's life.

3.10 There is no requirement on the HRA to make a minimum revenue provision but, there is a requirement for a charge for depreciation.

3.11 Repayments included in annual PFI or finance leases are applied as MRP.

MRP Consultation

3.12 DLUHC is also finalising a consultation on amending the MRP regulations and guidance that is planned to take effect from the 1st April 2024. The outcome of the proposed amendments is not expected to have an impact on the MRP policy proposed above or the estimated annual MRP charge as set out in the medium-term financial plan. Should there be any material change then this will be reported to Audit Committee and within the regular finance monitoring report.

Affordability prudential indicator

3.13 The previous sections cover the overall capital and control of borrowing prudential indicators but, within this framework prudential indicators are required to assess the affordability of the capital investment plans. These provide an indication of the impact of the capital investment plans on the council's overall finances. Council is asked to approve the following indicator:

Ratio of financing costs to net revenue stream. This indicator identifies the trend in the cost of capital (borrowing and other long term obligation costs net of investment income) against the net revenue stream.

Table 3: Ratio of financing costs to net revenue stream

	2022/23 Actual %	2023/24 Estimate (P8) %	2024/25 Estimate %	2025/26 Estimate %	2026/27 Estimate %	2027/28 Estimate %	2028/29 Estimate %
General Fund	6.5	7.7	7.2	9.1	9.5	9.2	9.1
HRA	6.4	2.2	7.2	13.0	14.7	16.9	19.6

The estimates of financing costs include current commitments and the proposals in this budget report. The HRA is subject to an alternative affordability principle as set out in the Capital Strategy, The HRA thresholds are attributed to an Interest Cover Ratio (ICR) that

cannot fall below 1.25 (currently at 1.27) supplemented by minimum reserves in relation to the major repairs reserve of at least £10m and a general HRA reserve of £21m.

4 Borrowing

4.1 The capital expenditure plans set out in Section 3 provide details of the service activity of the council. The treasury management function ensures that the council's cash is organised in accordance with the relevant professional codes, so that sufficient cash is available to meet this service activity and the council's capital strategy. This will involve both the management of the daily cash flows and, where capital plans require, the arrangement of appropriate borrowing facilities. The strategy covers the relevant treasury/prudential indicators, the current and projected debt positions and the Annual Investment Strategy.

Current and projected portfolio position

4.2 The council's treasury portfolio position at 31 March 2023, with forward projections, is summarised below. The table shows the actual external debt against the underlying capital borrowing need (the Capital Financing Requirement), highlighting any over- or under-borrowing.

Table 4: Current and projected debt portfolio position

	2022/23 Actual £m	2023/24 Estimate (P8) £m	2024/25 Estimate £m	2025/26 Estimate £m	2026/27 Estimate £m	2027/28 Estimate £m	2028/29 Estimate £m
External Debt 1 April	451	446	486	801	1,036	1,164	1,337
Expected change in debt	(5)	40	315	235	128	173	145
Other long-term liabilities	125	118	109	100	90	82	74
Expected change in other long-term liabilities	(7)	(9)	(9)	(10)	(8)	(8)	(8)
Debt Administered on behalf of the Unitary authorities	(36)	(35)	(33)	(32)	(31)	(30)	(28)
Actual gross debt 31 March	528	560	867	1,094	1,215	1,381	1,520
Capital Financing Requirement	940	969	1,206	1,405	1,499	1,627	1,753
Under borrowing	(412)	(409)	(339)	(311)	(284)	(246)	(233)

Gross Debt and the Capital Financing Requirement

4.3 Within the prudential indicators there are a number of key indicators to ensure that the council operates its activities within defined limits. One of these is that the council needs to ensure that its gross debt does not, except in the short term, exceed the total of the

CFR in the preceding year plus the estimates of any additional CFR for 2024/25 and the following two financial years. This allows some flexibility for limited early borrowing for future years but ensures that borrowing is not undertaken for revenue or speculative purposes.

4.4 The Chief Finance Officer reports that the council complied with this prudential indicator in the current year and does not envisage any difficulties for future compliance. This view takes into account current commitments, existing plans, and the proposals in this budget report.

Treasury Indicators: limits to borrowing activity

4.5 **The operational boundary for external debt** - This is the limit beyond which external debt is not normally expected to exceed. In most cases, this would be a similar figure to the CFR, but may be lower or higher depending on the levels of actual debt and ability to fund under-borrowing by other cash resources.

4.6 Currently the operational boundary is planned to be lower than the CFR as the council is utilising other cash resources to support the financing of the capital programme, also commonly known as under-borrowing or internal borrowing, as shown in table 5.

Table 5: The Operational Boundary

	2023/24 Approved £m	2024/25 Estimate £m	2025/26 Estimate £m	2026/27 Estimate £m	2027/28 Estimate £m	2028/29 Estimate £m
Debt	546	801	1,036	1,164	1,337	1,482
Other long-term liabilities	116	109	100	90	82	74
Total	662	910	1,136	1,254	1,419	1,556

4.7 **The authorised limit for external debt.** A further key prudential indicator represents a control on the maximum level of borrowing. This represents a legal limit beyond which external debt is prohibited, and this limit needs to be set or revised by Full Council. It reflects the level of external debt which, while not desired, could be afforded in the short term, but is not sustainable in the longer term.

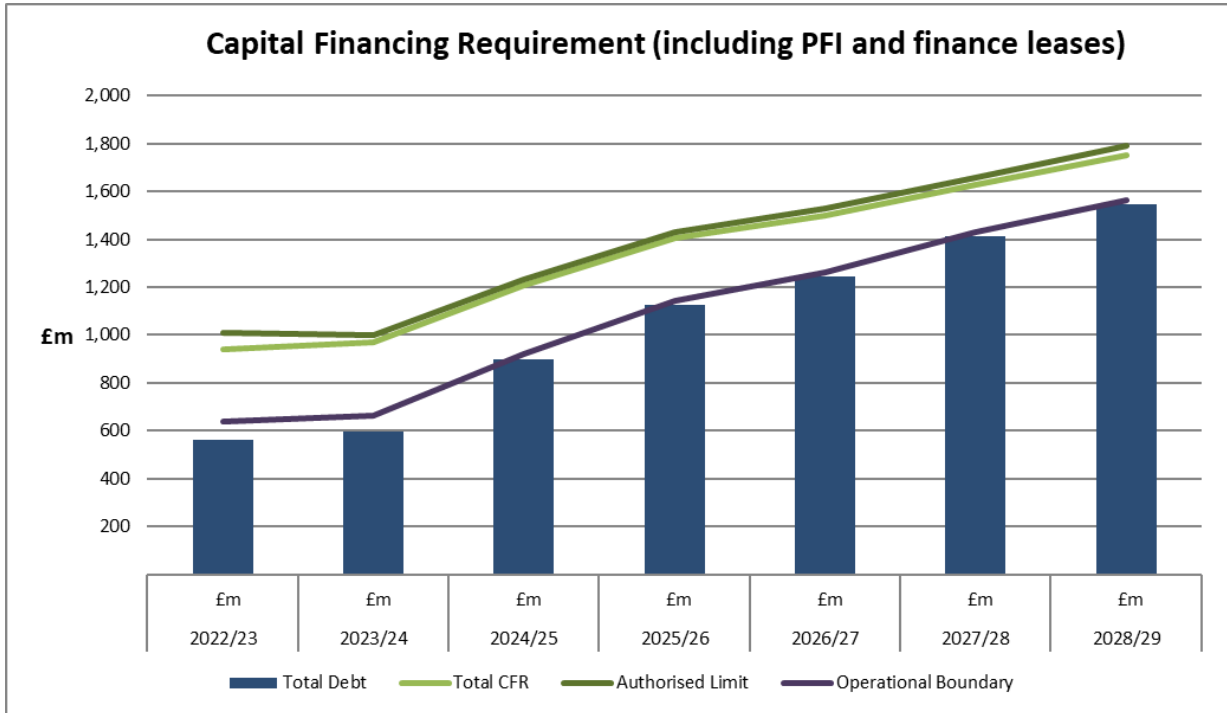
- This is the statutory limit determined under section 3 (1) of the Local Government Act 2003. The government retains an option to control either the total of all councils' plans, or those of a specific council, although this power has not yet been exercised.
- Council is asked to approve the following authorised limit:

Table 6: The Authorised limit for External Debt

	2023/24 Approved £m	2024/25 Estimate £m	2025/26 Estimate £m	2026/27 Estimate £m	2027/28 Estimate £m	2028/29 Estimate £m
Total	1,000	1,230	1,430	1,530	1,660	1,790

A graphical representation of these prudential indicators in relation to the council’s projected external borrowing (Gross Debt) and its Capital Financing Requirement are presented below:

Figure 2: Capital Finance Requirement Chart



Prospects for interest rates

4.8 The council’s treasury advisors routinely provide information on the prospects for interest rates to support the council in formulating its view on interest rates as set out in the following table.

Table 7: Prospects for Interest Rates

Period	Bank Rate %	PWLB Borrowing Rates % (including certainty rate adjustment)			
		5 year	10 Year	25 year	50 year
Mar 2024	5.25	4.90	5.00	5.30	5.10
Mar 2025	4.00	4.20	4.20	4.50	4.30
Mar 2026	3.00	3.60	3.70	4.10	3.90
Mar 2027	3.00	3.50	3.50	4.00	3.80

4.9 The above forecast reflects the view that the Monetary Policy Committee are keen to demonstrate its anti-inflation credentials by keeping Bank Rate at 5.25% until at least September 2024. Rate cuts are expected to start when both the Core Price Inflation (CPI) and wage / employment data are supportive of such a move, and that there is a likelihood of the overall economy enduring at least a mild recession over the coming months,

although most recent Gross Domestic Product (GDP) releases have surprised markets with their on-going robustness.

The timing on this will remain one of fine judgment: cut too soon, and inflationary pressures may well build up further; cut too late, and any downturn or recession may be prolonged.

The above forecast expects the MPC to keep Bank Rate at 5.25% for the first half of 2024 to combat on-going inflationary and wage pressures. The council's treasury advisors do not think that the MPC will increase Bank Rate above 5.25%, but it is a possibility.

As there are so many variables at this time, caution must be exercised in respect of these interest rate forecasts.

Investment and borrowing rates

4.10 **Investment percentage returns** are expected to be similar in 2024/25 due to the expected fall in interest rates over the second half of the year, as inflationary pressures ease.

4.11 **Borrowing interest rates** - the forecast for PWLB borrowing rates show a general downward trend across all maturity bands over the next three years. There is likely to be exceptional volatility and unpredictability in respect of gilt yields and PWLB rates from numerous factors.

There are risks to these forecasts as set out in Annex 2: Economic Forecast and Interest Rate Forecast.

4.12 **Borrowing for capital expenditure.** The long-term (beyond 10 years), forecast for Bank Rate is 3.00%. As the PWLB certainty rates are significantly above 3.00%, there remains value in considering short term / temporary borrowing as these rates are likely to remain near Bank Rate, that is below forecasted PWLB rates over the medium to long term and may also prove attractive as part of having a balanced debt portfolio. It should be noted that HM Treasury have introduced a discounted HRA loan rate for one year from June 2023 with its continuation subject to review. The discount below the PWLB certainty rate that the Council's General Fund has access to is 20 basis points.

The policy of avoiding new borrowing by using spare cash balances has served well over the last few years. However, this needs to be carefully reviewed to avoid incurring higher borrowing costs in the future when authorities may not be able to avoid new borrowing to finance capital expenditure and/or the refinancing of maturing debt.

There could be a cost of carry, (the difference between higher borrowing costs and lower investment returns), to any new long-term borrowing that causes a temporary increase in cash balances as this position will, most likely, incur a revenue cost.

There are also alternative sources of long-term borrowing available, besides PWLB, if an authority is seeking to avoid a "cost of carry" but also wishes to mitigate future re-financing risk, and these sources will be considered.

Borrowing Strategy

- 4.13 Based on current cash flow forecasts, it is estimated that the council will have a net borrowing requirement of £996m over the MTFs period. The most significant consideration from a treasury management perspective is the timing and duration of that borrowing. Should the financial environment change and borrowing is deemed advantageous, the council will seek to borrow long-term loans near / below a “target rate” of 4.00% and short to medium term loans near / below the “target rate” of 5.50%.
- 4.14 The council is forecasting to reduce its under-borrowed position. The under-borrowed position means that the capital borrowing need (the Capital Financing Requirement) has not been fully funded with loan debt as cash supporting the council’s reserves, balances and cash flow has been used as a temporary measure (internal borrowing). This strategy is prudent as medium and longer dated borrowing rates are expected to fall from their current levels once inflation concerns are addressed by tighter near-term monetary policy. That is, the Bank Rate remains elevated through to the second half of 2024.
- 4.15 Against this background and the risks within the economic forecast, caution will be adopted with the 2024/25 treasury operations. The Chief Finance Officer will monitor interest rates in financial markets and adopt a pragmatic approach to changing circumstances:
- *If it was felt that there was a significant risk of a sharp FALL in borrowing rates, then borrowing would be postponed.*
 - *if it was felt that there was a significant risk of a much sharper RISE in borrowing rates than that currently forecast, perhaps arising from an acceleration in the rate of increase in central rates in the USA and UK, or a sudden increase in inflation risks, then the portfolio position will be re-appraised. Most likely, fixed rate funding will be drawn whilst interest rates are lower than they are projected to be in the next few years.*
- 4.16 Any decisions will be reported to the appropriate decision-making body at the next available opportunity.
- Long term and short-term fixed interest rates are expected to fall over the medium term. The Chief Finance Officer, under delegated powers, will take the most appropriate form of borrowing depending on the prevailing interest rates at the time, taking into account the risks shown in the Economic Interest Rate Forecast (Annex 2).
 - The strategy of postponing borrowing and running down investment balances has been applied in 2023/24. This approach will continue until balances are reduced to adequate liquidity requirements unless it is felt that there is a significant risk of a sharp rise in interest rates.
 - The council’s borrowing strategy will consider new borrowing in the following ways:
 - The cheapest borrowing in recent years has been internal borrowing by running down cash balances and foregoing interest earned at historically low rates, however over the past 2 years, investment returns have increased significantly and the savings generated from internal borrowing over the coming year will be negligible.
 In view of the overall forecast for long-term borrowing rates to fall over the medium term, consideration will continue to be given to the short term advantage of internal borrowing while also considering taking short to medium term funding from the PWLB as long term borrowing rates are expected to fall during the medium term.

- Short to medium funding from local authorities and financial institutions at rates lower than the PWLB.
- Short to medium funding from Community Municipal Investments or Retail Bonds for Zero Carbon Initiatives as set out in paragraph 5.1 at rates lower than the PWLB
- PWLB loans for up to 10 years where rates are expected to be lower than rates for longer periods. This offers a range of options for new borrowing, which will spread debt maturities away from a concentration in the longer dated debt that the council holds.
- PWLB loans in excess of 10 years where rates are considered to be low and offer the council the opportunity to lock into low value long-term finance.
- Long term fixed rate market loans at rates significantly below PWLB rates for the equivalent maturity period (where available) and to maintain an appropriate balance between PWLB and market debt in the debt portfolio.
- Long-term borrowing from the Municipal Bond Agency and the UK Infrastructure bank if available and appropriate and the rates are lower than those offered by the Public Works Loan Board (PWLB).
- Financial institutions, primarily insurance companies and pension funds but also some banks, out of forward dates where the objective is to avoid a “cost of carry” or to achieve refinancing certainty over the next few years.

4.17 The authority is planning net borrowing of £996m over the period, to finance the expected Prudential Borrowing requirement of £912m as set out in in the Capital programme. The higher borrowing of £84m reflects the cash needed to reverse internal borrowing that was undertaken in previous years due to reserves and working capital that is now planned to be utilised during the MTFP period. This is increased further by the cash set aside for the repayment of debt, also known as Minimum Revenue Provision (MRP). The most efficient arrangement is for MRP to be used to reduce the new long-term debt expected to be required. This ensures that MRP is utilised and does not accumulate as cash on the balance sheet and reduces the expected level of debt. Alternatively, MRP could be used to repay existing debt, but this would be a cost to the council in the current interest rate environment.

The level of borrowing will ensure the authority will maintain adequate liquidity levels as set out in the strategy.

4.18 The council will seek to undertake temporary borrowing (less than one year) loans to cover day-to-day cashflow requirements as and when required. Such a decision will be based on the availability of and access to cash in deposit accounts and money market funds to cover the cashflow requirement, whilst also considering the most cost effective method for the authority.

4.19 Temporary borrowing will also be considered when the draw down deadline for a deposit account for same day transfer has passed, thus resulting in borrowing cash from the money markets.

4.20 The Chief Finance Officer will be kept informed of the temporary loans outstanding on a monthly basis and reviewed at the regular Treasury Management Group meeting.

Policy on borrowing in advance of need

4.21 The council will not borrow more than or in advance of its needs purely to invest to make an additional return. Any decision to borrow in advance will be within forward approved

Capital Financing Requirement estimates and will be considered carefully to ensure that value for money can be demonstrated and that the council can ensure the security of such funds.

- 4.22 Risks associated with any borrowing in advance activity will be subject to prior appraisal and subsequent reporting through the mid-year or annual reporting mechanism.

Debt Rescheduling

- 4.23 As the yield curve is relatively flat there are limited opportunities to generate savings by switching from long term debt to short term debt. In addition, rescheduling of our PWLB loans is unlikely to be beneficial due to how the repayment penalties and discounts are calculated. Any savings will need to be considered in the light of the current treasury position and the size of the cost of debt repayment (premiums incurred).

- 4.24 The reasons for any rescheduling to take place will include:

- the generation of cash savings and / or discounted cash flow savings.
- helping to fulfil the treasury management strategy.
- enhance the balance of the portfolio (amend the maturity profile and/or the balance of volatility).

- 4.25 All rescheduling will be reported to the council at the earliest meeting following its action.

- 4.26 As set out in the capital strategy, the council will seek to reduce its borrowing costs over the strategy's timeframe, by repaying and / or restructuring debt (CFR) to reduce annual debt financing costs to support delivery of services.

The Department for Levelling Up, Housing & Communities has recently published a document requesting a call for views on new local authority capital flexibilities. Included within these flexibilities are the use of disposal proceeds from Investment Estate assets to repay Public Works Loan Board Borrowing without a penalty (where one would otherwise be charged). This could be an opportunity for Council's to repay high coupon debt without penalty, though the loss of investment income will need to be considered. The outcome of any changes will be reported accordingly.

5 Zero Carbon initiatives

- 5.1 The capital strategy references the council being able to:

...explore zero carbon initiatives funded through Community Municipal Investments or Retail Bonds up to a maximum exposure in such investments of £2m. The exposure to such initiatives would be included within the General Fund capital financing costs exposure of a maximum 10% of the net revenue budget.

- 5.2 If such an opportunity arose, the council would explore the zero carbon initiative in accordance with this strategy.

6 Annual Investment Strategy

Investment policy

- 6.1 The Department of Levelling Up, Housing and Communities (DLUHC) and CIPFA have extended the meaning of 'investments' to include both financial and non-financial

investments. This report deals solely with financial investments (as managed by the treasury management team). Non-financial investments, essentially the purchase of income yielding assets and service investments, are covered in the capital strategy (a separate report approved by Council).

- 6.2 The council's investment policy has regard to the following:
- DLUHC's Guidance on Local Government Investments ("the Guidance")
 - CIPFA Treasury Management in Public Services Code of Practice and Cross Sectoral Guidance Notes 2021 ("the Code")
 - CIPFA Treasury Management Guidance Notes 2021.
 - Ethical and Equitable Investment Policy (Annex 4)
- 6.3 The council's investment priorities will be security first, portfolio liquidity second and then yield, (return). The council will aim to achieve the optimum return (yield) on its investments commensurate with proper levels of security and liquidity and within the council's risk appetite.
- 6.4 In the current economic climate, it is considered appropriate to maintain a degree of liquidity to cover cash flow needs but to also consider "laddering" investments for periods up to 12 months with high credit rated financial institutions, whilst investment rates remain elevated, as well as wider range fund options.
- 6.5 The above guidance from DLUHC and CIPFA places a high priority on the management of risk. This council has adopted a prudent approach to managing risk and defines its risk appetite by the following means:
- Minimum acceptable credit criteria are applied in order to generate a list of highly creditworthy counterparties. This also enables diversification and thus avoidance of concentration risk. The key ratings used to monitor counterparties are the short term and long-term credit ratings.
 - Credit ratings are collated by our advisors from the major credit rating agencies such as Moody's, S&P and Fitch.
 - Other information: credit ratings will not be the sole determinant of the quality of an institution; it is important to continually assess and monitor the financial sector on both a micro and macro basis and in relation to the economic and political environments in which institutions operate. The assessment will also take account of information that reflects the opinion of the markets. To achieve this consideration the council will engage with its advisors to maintain a monitor on market pricing such as "credit default swaps" and overlay that information on top of the credit ratings.
 - Other information sources used will include the financial press, share price and other such information pertaining to the financial sector, in order to establish the most robust scrutiny process on the suitability of potential investment counterparties.
 - The council has defined the list of types of investment instruments that the treasury management team are authorised to use. There are two lists in Annex 3 under the categories of 'specified' and 'non-specified' investments. Counterparty limits are set through the council's treasury management practices – schedules using the parameters below:
 - **Specified investments** are those with a high level of credit quality and subject to a maturity limit of one year or those which could be for a longer period but where the council has the right to be repaid within 12 months if it wishes or have less than a year left to run to maturity if originally they were classified as being non-specified investments solely due to the maturity period exceeding one year.

- **Non-specified investments** are those with less high credit quality, maybe for periods in excess of one year, and/or are more complex instruments which require greater consideration by members and officers before being authorised for use.
- Counterparty lending limits (amounts and maturity) will be set using the investment criteria below.

Creditworthiness policy

- 6.6 The primary principle governing the council's investment criteria is the security of its investments, whilst liquidity and the yield on the investment is also a key consideration. After this main principle, the council will ensure that:
- It maintains a policy covering both the categories of investment types it will invest in, criteria for choosing investment counterparties with adequate security, and monitoring their security. This is set out in the specified and non-specified investment sections below; and
 - It has sufficient liquidity in its investments. For this purpose, it will set out procedures for determining the maximum periods for which funds may prudently be committed. These procedures also apply to the council's prudential indicators covering the maximum principal sums invested.
- 6.7 The Chief Finance Officer will maintain a counterparty list in compliance with the following criteria and will revise the criteria and submit them to council for approval as necessary. These criteria are separate to that which determines which types of investment instrument are either specified or non-specified as it provides an overall pool of counterparties considered high quality which the council may use, rather than defining what types of investment instruments are to be used.
- 6.8 The minimum rating criteria uses the lowest common denominator method of selecting counterparties and applying limits. This means that the application of the council's minimum criteria will apply to the lowest available rating for any institution. For instance, if an institution is rated by two agencies, one meets the council's criteria, the other does not, the institution will fall outside the lending criteria. Any rating changes, rating watches (notification of a likely change), rating outlooks (notification of a possible longer-term change) are considered before making investment decisions.
- 6.9 The criteria for providing a pool of high-quality investment counterparties (both specified and non-specified investments) is:
- **Banks 1:** good credit quality – the council will only use banks which:
 - are UK banks; and/or
 - are non-UK and domiciled in a country which has a minimum sovereign long-term rating of AA- and have, as a minimum, the following Fitch, Moody's and Standard and Poors credit ratings (where rated):
 - Short term – F1 (or equivalent)
 - Long term – A- (or equivalent)
 - **Banks 2:** part nationalised UK banks – Royal Bank of Scotland ring-fenced operations. This bank can be included if they continue to be part nationalised or they meet the ratings in Banks 1 above.
 - **Banks 3:** the council's own banker for transactional purposes if the bank falls below the above criteria, although in this case balances will be minimised in both monetary size and time.

- **Bank subsidiary and treasury operation:** the council will use these where the parent bank has provided an appropriate guarantee or has the necessary ratings outlined above.
- **Building societies:** the council will use all societies which meet the ratings for banks outlined above.
- **Money market funds (CNAV Constant Net Asset Value):** AAA rated (sterling)
- **Money Market Funds (LVNAV Low Volatility Net Asset Value):** AAA rated (sterling)
- **Money Market Funds (VNAV Variable Net Asset Value):** AAA rated (sterling)
- **Ultra-Short dated Bond Funds with a volatility rating of S1+**
- **UK Government** (including gilts, Treasury Bills and the DMADF)
- **Local authorities, parish councils etc**
- **Supranational institutions**
- **Council owned subsidiaries:** the council invests in wholly owned council subsidiaries. Depending on the nature of the investment this will either be classified as a service investment or a treasury investment. Service investments fall outside the scope of the specified/ non-specified categories and currently investments of this type are classified as service investments.

A limit of £50 million will be applied to the use of non-specified investments.

Country and sector considerations

- 6.10 Due care will be taken to consider the country, group and sector exposure of the council's investments. The council has determined that it will only use approved counterparties from countries with a minimum sovereign credit rating of AA- from Fitch (or equivalent). In addition:
- no more than 25% will be placed with any non-UK country at any time
 - limits in place above will apply to a group of companies
 - sector limits will be monitored regularly for appropriateness.
- 6.11 **Use of additional information other than credit ratings.** Additional requirements under the Treasury Management Code require the council to supplement credit rating information. Whilst the above criteria relies primarily on the application of credit ratings to provide a pool of appropriate counterparties for officers to use, additional operational market information will be applied before making any specific investment decision. This additional market information (for example Credit Default Swaps (CDS), negative rating watches/outlooks) will be applied to compare the relative security of differing investment counterparties.

Time and monetary limits applying to investments

- 6.12 Time and monetary limits apply to investments. The time and monetary limits for institutions on the council's counterparty list are as follows (these will cover both specified and non-specified investments):

Table 8: Time & monetary limits applying to investments

	Fitch Long term Rating (or equivalent)	Money Limit	Time Limit
Banks 1 - higher quality	AAA	£50m	5 Years
Banks 1 - medium quality	AA-	£20m	3 Years
Banks 1 - lower quality	A-	£10m	1 Year
Banks 2 – part-nationalised	N/A	£10m	1 Year
Limit 3 category – council’s banker (not meeting Banks 1/2)	-	£200k	Liquid
Other institutions limit*	-	£50m	5 Years
DMADF	UK Sovereign rating	unlimited	1 Year
Local authorities	-	£40m	5years
Money market funds (MMF) (Including CNAV, LVNAV & VNAV)	AAA	£40m	liquid
Ultra-Short Dated Bond Funds	S1+	£10m	liquid

**The Other Institution Limit will be for Gilt and Supranational investments*

The proposed criteria for specified and non-specified investments are shown in Annex 3 for approval.

- 6.13 Investments will be made with reference to the core balance and cash flow requirements and the outlook for short-term interest rates (ie rates for investments up to 12 months). Greater returns are usually obtainable by investing for longer periods.
- 6.14 The current shape of the yield curve suggests that this is the case at present, with the prospect of Bank Rate having peaked in the second half of 2023 and possibly reducing as early as the second half of 2024, so an agile investment strategy would be appropriate to optimise returns.
- 6.15 While most cash balances are required in order to manage the fluctuations of the cash flows, where cash sums can be identified that could be invested for longer periods, the value to be obtained from longer term investments will be carefully assessed.
- If it is thought that Bank Rate is likely to rise significantly within the time horizon being considered, then consideration will be given to keeping most investments as being short term or variable.
 - Conversely, if it is thought that Bank Rate is likely to fall within that time period, consideration will be given to locking in higher rates currently obtainable, for longer periods.
- 6.16 **Investment return expectations.**

The current forecast shown in Annex 2 includes a forecast for Bank Rate to have peaked in Q4 2023. The suggested budgeted investment earnings rates for returns on investments placed for periods up to about three months during each financial year are as follows (the long term forecast is for periods over 10 years in the future):

- 2023/24 (remainder) 5.30%
- 2024/25 4.70%
- 2025/26 3.20%
- 2026/27 3.00%
- 2027/28 3.25%
- Long term later years 3.25%

As there are many variables at this time, caution must be exercised in respect of these interest rate forecasts.

Treasury management limits on activity

6.17 There are three debt-related treasury activity limits. The purpose of these is to restrain the activity of the treasury function within certain limits, thereby managing risk and reducing the impact of any adverse movement in interest rates. The indicators are:

- Upper limits on variable interest rate exposure. This identifies a maximum limit for variable interest rates based upon the debt position net of investments
- Upper limits on fixed interest rate exposure. This is similar to the previous indicator and covers a maximum limit on fixed interest rates
- Maturity structure of borrowing. These gross limits are set to reduce the council's exposure to large, fixed-rate sums falling due for refinancing, and are required for upper and lower limits
- The council is asked to approve the following treasury indicators and limits:

Table 9: Treasury management limits on activity

	2023/24 Upper	2024/25 Upper	2025/26 & Beyond Upper
Limits on fixed interest rates based on net debt	100%	100%	100%
Limits on variable interest rates based on net debt	40%	40%	40%
Maturity structure of fixed interest rate borrowing 2023/24			
	Lower	Upper	
Under 12 months	0%	40%	
12 months to 2 years	0%	40%	
2 years to 5 years	0%	40%	
5 years to 10 years	0%	50%	
10 years and above	25%	100%	

Investment treasury indicator and limit

6.18 **Total principal funds invested for greater than 364 days** - These limits are set with regard to the council's liquidity requirements and to reduce the need for early sale of an investment.

Table 10: Investment treasury indicators & limit

Maximum principal sums invested > 365 days (Treasury Investments)			
£m	2024/25	2025/26	2026/27 & Beyond
Principal sums invested > 364 days	£50m	£50m	£50m

6.19 For its cash flow generated balances, the council will seek to utilise its business reserve instant access and notice bank accounts, money market funds and short-dated deposits (overnight to 100 days) in order to benefit from the compounding of interest.

7 Ethical & Equitable Investment Policy

7.1 An updated Ethical and Equitable Investment Policy was approved by Cabinet and Full Council on the 18 January 2022 and 22 March 2022 respectively. The original policy stated the city council will not knowingly invest in organisations whose activities include practices which directly pose a risk of serious harm to individuals or groups, or whose activities are inconsistent with the mission and values of the city council. The updated policy builds on this by taking a more proactive approach to ethical investment and a widening of the policy to promote an equitable approach to investment across all communities in Bristol. It should be noted a core element of the new policy continues to be the application of statutory guidance relating to treasury management funds. A copy of this policy forms part of this report (annex 4).

During the financial year 2023/24, the Council deposited £5m of Treasury balances for 7 months of the year in a strongly rated UK bank at a comparable market interest rate for investment in sustainable development goals including climate change, health, financial inclusion and education.

Investment Risk Benchmarking

7.2 These benchmarks are simple guides to maximum risk, so they may be breached from time to time, depending on movements in interest rates and counterparty criteria. The purpose of the benchmark is that officers will monitor the current and trend position and amend the operational strategy to manage risk as conditions change. Any breach of the benchmarks will be reported, with supporting reasons in the mid-year or Annual Report.

7.3 **Security** - The council's maximum security risk benchmark for the current portfolio, when compared to these historic default tables, is:

- 0.04% (AAA rated) to 0.05% (A rated) historic risk of default when compared to the whole portfolio.

Liquidity – in respect of this area the council seeks to maintain:

- Bank overdraft – zero (available upon request).

- Liquid short-term deposits of at least £50m available within a rolling three-month period.
- Weighted average life benchmark is expected to be a minimum of a day with a maximum of 1 year.

Yield - local measures of yield benchmarks are:

- Investments – internal returns above the 7-day SONIA compounded rate (Sterling Overnight Interbank Average).

And in addition, that the security benchmark for each individual year is:

Table 11: Investment risk benchmarking

	1 year	2 years	3 years	4 years	5 years
Maximum	0.05%	0.13%	0.24%	0.36%	0.50%

This benchmark is an average risk of default measure and would not constitute an expectation of loss against a particular investment.

Annexes

Annex 1 - Treasury Management Policy Statement

Annex 2 – Economic Interest Rate Forecast

Annex 3 – TMP1 Credit and Counterparty Risk Management

Annex 4 – Ethical and Equitable Investment Policy

Annex 1**Treasury Management Policy Statement**

1. The council defines its treasury management activities as follows:

The management of the council's borrowing, investments and cash flows, its banking, money market and capital market transactions; the effective control of the risks associated with those activities; and the pursuit of optimum performance consistent with those risks.

2. The council regards the successful identification, monitoring and control of risk to be the prime criteria by which the effectiveness of its treasury management activities will be measured. Accordingly, the analysis and reporting of treasury management activities will focus on their risk implications for the council, and any financial instruments entered into to manage these risks.
3. The council acknowledges that effective treasury management will provide support towards the achievement of its business and service objectives. It is therefore committed to the principles of achieving value for money in treasury management, and to employing suitable comprehensive performance measurement techniques, within the context of effective risk management.
4. The council's high-level policies for borrowing and investments are:
 - The council's borrowing will be affordable, sustainable and prudent and consideration will be given to the management of interest rate risk and refinancing risk. The source from which the borrowing is taken, and the type of borrowing, should allow the council transparency and control over its debt
 - The council's primary objective in relation to investments remains the security of capital. The liquidity or accessibility of the council's investments followed by the yield earned on investments remain important but are secondary considerations.

Annex 2

Economic Interest Rate Forecast

Table 1 – Interest Rate Forecast

Link Group Interest Rate View	07.11.23												
	Dec-23	Mar-24	Jun-24	Sep-24	Dec-24	Mar-25	Jun-25	Sep-25	Dec-25	Mar-26	Jun-26	Sep-26	Dec-26
BANK RATE	5.25	5.25	5.25	5.00	4.50	4.00	3.50	3.25	3.00	3.00	3.00	3.00	3.00
3 month ave earnings	5.30	5.30	5.30	5.00	4.50	4.00	3.50	3.30	3.00	3.00	3.00	3.00	3.00
6 month ave earnings	5.60	5.50	5.40	5.10	4.60	4.10	3.60	3.40	3.10	3.10	3.10	3.10	3.10
12 month ave earnings	5.80	5.70	5.50	5.20	4.70	4.20	3.70	3.50	3.30	3.30	3.30	3.30	3.30
5 yr PWLB	5.00	4.90	4.80	4.70	4.40	4.20	4.00	3.80	3.70	3.60	3.50	3.50	3.50
10 yr PWLB	5.10	5.00	4.80	4.70	4.40	4.20	4.00	3.80	3.70	3.70	3.60	3.60	3.50
25 yr PWLB	5.50	5.30	5.10	4.90	4.70	4.50	4.30	4.20	4.10	4.10	4.00	4.00	4.00
50 yr PWLB	5.30	5.10	4.90	4.70	4.50	4.30	4.10	4.00	3.90	3.90	3.80	3.80	3.80

The forecasts for average earnings are averages ie rates offered by individual banks may differ significantly from these averages, reflecting their different needs for borrowing short term cash at any one point in time.

The central interest rate forecast reflects a view that the MPC are keen to further demonstrate its anti-inflation credentials by keeping Bank Rate at 5.25% until at least the middle of 2024. Rate cuts are expected to start when both the CPI inflation and wage/employment data are supportive of such a move, and that there is a likelihood of the overall economy enduring at least a mild recession over the coming months, although most recent GDP releases have surprised with their on-going robustness.

The timing on this will remain one of judgment: cut too soon, and inflationary pressures may well build up further; cut too late and any downturn or recession may be prolonged.

In the coming months, forecasts will be guided not only by economic data releases and clarifications from the MPC over its monetary policies and the Government over its fiscal policies, but also international factors such as policy development in the US and Europe, the provision of fresh support packages to support the faltering recovery in China as well as the on-going conflict between Russia and Ukraine, and Gaza and Israel.

On the positive side, consumers are still anticipated to be holding onto excess savings left over from the pandemic, which could cushion some of the impact of the above challenges and may be the reason why the economy is performing somewhat better at this stage of the economic cycle than may have been expected. However, most of those excess savings are held by more affluent households whereas lower income families already spend nearly all their income on essentials such as food, energy and rent/mortgage payments.

PWLB RATES

PWLB rates are expected to fall by circa 1.5% across all maturity periods during the next 3 years with 5 to 50 years PWLB rates operating within a narrow band of circa 0.50%.

The balance of risks to the UK economy: -

- The overall balance of risks to economic growth in the UK is to the downside.

Downside risks to current forecasts for UK gilt yields and PWLB rates include: -

- **Labour and supply shortages** prove more enduring and disruptive and depress economic activity (accepting that in the near-term this is also an upside risk to inflation and, thus, could keep gilt yields high for longer).
- **The Bank of England** has increased Bank Rate too fast and too far over recent months, and subsequently brings about a deeper and longer UK recession than we currently anticipate.
- **UK / EU trade arrangements** – if there was a major impact on trade flows and financial services due to complications or lack of co-operation in sorting out significant remaining issues.

- **Geopolitical risks**, for example in Ukraine/Russia, the Middle East, China/Taiwan/US, Iran and North Korea, which could lead to increasing safe-haven flows.

Upside risks to current forecasts for UK gilt yields and PWLB rates: -

- Despite the recent tightening to 5.25%, the **Bank of England proves too timid** in its pace and strength of increases in Bank Rate and, therefore, allows inflationary pressures to remain elevated for a longer period within the UK economy, which then necessitates Bank Rate staying higher for longer than we currently project.
- **The pound weakens** because of a lack of confidence in the UK Government's pre-election fiscal policies, resulting in investors pricing in a risk premium for holding UK sovereign debt.
- Longer-term **US treasury yields** rise strongly if inflation remains more stubborn there than the market currently anticipates, consequently pulling gilt yields up higher. (We saw some movements of this type through October although generally reversed in the last week or so.)
- Projected **gilt issuance, inclusive of natural maturities and QT**, could be too much for the markets to comfortably digest without higher yields compensating.

Borrowing advice: Our long-term (beyond 10 years) forecast for Bank Rate has increased from 2.75% to 3% and reflects Capital Economics' research that suggests AI and general improvements in productivity will be supportive of a higher neutral interest rate. As all PWLB certainty rates are currently significantly above this level, borrowing strategies will need to be reviewed in that context. Overall, better value can generally be obtained at the shorter end of the curve and short-dated fixed LA to LA monies should be considered. Temporary borrowing rates will remain elevated for some time to come but may prove the best option whilst the market continues to wait for inflation, and therein gilt yields, to drop back later in 2024.

Annex 3**Treasury Management Practice (TMP1) – Credit and Counterparty Risk Management**

The DLUHC issued Investment Guidance in 2018, and this forms the structure of the council's policy below. These guidelines do not apply to either trust funds or pension funds, which operate under a different regulatory regime.

The key intention of the Guidance is to maintain the current requirement for councils to invest prudently, and that priority is given to security and liquidity before yield. In order to facilitate this objective, the guidance requires this council to have regard to the CIPFA publication Treasury Management in the Public Services: Code of Practice and Cross-Sectoral Guidance Notes. The council has adopted the Code and will apply its principles to all investment activity. In accordance with the Code, the Chief Finance Officer has produced its treasury management practices (TMPs). This part, TMP 1(1), covering investment counterparty policy requires approval each year.

Annual investment strategy - the key requirements of both the Code and the investment guidance are to set an annual investment strategy, as part of its annual treasury strategy for the following year, covering the identification and approval of the following:

- The strategy guidelines for choosing and placing investments, particularly non-specified investments.
- The principles to be used to determine the maximum periods for which funds can be committed.
- Specified investments that the council will use. These are high security (i.e. high credit rating, although this is defined by the council, and no guidelines are given), and high liquidity investments in sterling and with a maturity of no more than a year.
- Non-specified investments, clarifying the greater risk implications, identifying the general types of investment that may be used and a limit to the overall number of various categories that can be held at any time.

The investment policy proposed for the council is:

Strategy guidelines – the main strategy guidelines are contained in the body of the treasury strategy statement.

Specified investments – these investments are sterling investments of not more than one-year maturity, or those which could be for a longer period but where the council has the right to be repaid within 12 months if it wishes. They also include investments which were originally classed as being non-specified investments, but which would have been classified as specified investments apart from originally being for a period longer than 12 months once the remaining period to maturity falls to under twelve months. These are considered low risk assets where the possibility of loss of principal or investment income is small. These would include sterling investments which would not be defined as capital expenditure with:

1. The UK Government (such as the Debt Management Account deposit facility, UK treasury bills or a gilt with less than one year to maturity).
2. Supranational bonds of less than one year's duration.
3. A local authority, housing association, parish council or community council.
4. Pooled investment vehicles (such as money market funds) that have been awarded a high credit rating by a credit rating agency. For category 4 this covers pooled investment vehicles, such as money market funds, rated AAA by Standard and Poor's, Moody's or Fitch rating agencies.

5. A body that is considered of a high credit quality (such as a bank or building society). For this category this covers bodies with a minimum short term rating of A- (or the equivalent) as rated by Standard and Poor's, Moody's or Fitch rating agencies.

Within these bodies, and in accordance with the Code, the council has set additional criteria to set the time and amount of monies which will be invested in these bodies. These criteria are set out below: -

Table 1 – Specified Investment Limits

	Fitch Long term Rating (or equivalent)	Money Limit	Time Limit
Banks 1 higher quality	AAA	£50m	5 Years
Banks 1 medium quality	AA-	£20m	3 Years
Banks 1 lower quality	A-	£10m	1 Year
Banks 2 – part nationalised	N/A	£10m	1 Year
Limit 3 category – council's banker (not meeting Banks 1/2)	-	£200k	Liquid
Other institutions limit*	-	£50m	5 Year
DMADF	AAA	unlimited	5 Years
Local authorities	-	£40m	5 Years
Money market funds (Including CNAV, LVNAV & VNAV)	AAA	£40m	Liquid
Ultra-Short Dated Bond Funds	S1+	£10m	liquid

**The Other Institution Limit will be for Gilt and Supranational investments*

Non-specified investments – are any other type of investment (ie not defined as specified above). The identification and rationale supporting the selection of these other investments and the maximum limits to be applied are set out below. Non specified investments are limited to an overall exposure of £50m and would include any sterling investments with:

Table 2 – Non-Specified Investments Limits

	Non-Specified Investment Category	Limit (£ or %)
a.	<p>Supranational bonds greater than 1 year to maturity</p> <p>(a) Multilateral development bank bonds - These are bonds defined as an international financial institution having as one of its objects economic development, either generally or in any region of the world (e.g. European Reconstruction and Development Bank etc.).</p> <p>(b) A financial institution that is guaranteed by the United Kingdom Government (e.g. National Rail)</p> <p>The security of interest and principal on maturity is on a par with the Government and so very secure. These bonds usually provide returns above equivalent gilt-edged securities. However, the value of the bond may rise or fall before maturity and losses may accrue if the bond is sold before maturity.</p>	AAA long term ratings £50m
b.	<p>Gilt edged securities with a maturity of greater than one year. These are Government bonds and so provide the highest security of interest and the repayment of principal on maturity. Similar to category (a) above, the value of the bond may rise or fall before maturity and losses may accrue if the bond is sold before maturity.</p>	£50m
c.	<p>The council's own banker if it fails to meet the basic credit criteria. In this instance balances will be minimised as far as is possible.</p>	Minimal
d.	<p>Any bank or building society that has a minimum long-term credit rating of A-, for deposits with a maturity of greater than one year (including forward deals in excess of one year from inception to repayment).</p>	£40m
e.	<p>Any non-rated subsidiary of a credit rated institution included in the specified investment category. These institutions will be included as an investment category subject to:</p> <ul style="list-style-type: none"> • Parent company guarantee • Parent company to be a UK institution. 	£10m
f.	<p>Share capital in a body corporate – The use of these instruments will be deemed to be capital expenditure, and as such will be an application (spending) of capital resources.</p> <p>Loan capital in a body corporate.</p> <p>There is a higher risk of loss with these types of instruments.</p>	£10m
g.	<p>Share capital to council owned companies – The use of these instruments will be deemed to be capital expenditure, and as such will be an application (spending) of capital resources.</p> <p>Loan capital to council owned companies</p>	£50m
h.	<p>Bond funds – There is a high risk of loss with this type of instrument.</p>	£10m

i.	Pooled property funds – The use of these instruments will normally be deemed to be capital expenditure, and as such will be an application (spending) of capital resources. The key exception to this is an investment in the CCLA Local Authorities Property Fund. This Authority will seek guidance on the status of any fund it may consider using.	£50m
j.	Property funds managed by a wholly owned council subsidiary – The use of these instruments will normally be deemed to be capital expenditure, and as such will be an application (spending) of capital resources.	£50m

In respect of categories f and h, these will only be considered after obtaining external advice and subsequent member approval.

Council owned companies - the council has purchased share capital / provided loans to wholly owned council subsidiaries. These are classified as service investments, rather than treasury management investments, and are therefore outside the specified / non specified categories.

The monitoring of investment counterparties - the credit rating of counterparties will be monitored regularly. The council receives credit rating information (changes, rating watches and rating outlooks) from Link Group as and when ratings change, and counterparties are checked promptly. On occasion ratings may be downgraded when an investment has already been made. The criteria used are such that a minor downgrading should not affect the full receipt of the principal and interest. Any counterparty failing to meet the criteria will be removed from the list immediately by the Chief Finance Officer, and if required new counterparties which meet the criteria will be added to the list.



Bristol City Council Ethical and Equitable Investment Policy

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Purpose

The purpose of this policy statement is to provide guiding principles to ensure Bristol City Council (“the council”) make investments which:

- are consistent with the council’s values framework and ethical policies (ethical)
- are inclusive and equitable with regards to access to the council’s investment funding, as well as helping to address economic inequalities (equitable)
- provide a positive social and/or environmental return, in other words have “impact”, alongside financial return where possible

This policy should be regarded as a baseline when making decisions. It is in no way intended to limit projects that seek to tackle different council objectives in a joined up and innovative way.

Aim

The aim is to use the council’s investments to support the council’s vision in playing a leading role in driving an inclusive, sustainable and healthy city of hope and aspiration, one where everyone can share in its success, in line with the council’s corporate strategy and the One City Plan.

To this end, the policy sets out investment principles which mainly based on three aspects:

- who the council will not invest in (ethical review 1)
- who the council want to invest in (ethical review 2)
- how the council will ensure investments are equitable (equitable principles)

These principles are outlined in more detail within the sections ethical review 1, ethical review 2 and equitable principles.

Legislative and Policy Context

Local authority investments are governed by the [Statutory Guidance on Local Government Investments](#) ¹, and the Chartered Institute of Public Finance and Accountancy (CIPFA) Treasury Management Code ². This is set out in further detail in the [council's annual Treasury Management Strategy](#).

This policy is also complemented by the council's [Equality and Inclusion Policy and Strategy](#); its [Social Value policy](#); and its commitments to payment of the Living Wage and eradicating [modern slavery](#).

Strategic Alignment

This policy statement aligns to the One City Plan's 'Corporate Strategy and A One City: Economic Recovery and Renewal Strategy' which sets out the following priorities:

- Reduce poverty and inequality
- Increase the city's resilience and environmental sustainability
- Enhance community economic and social wellbeing

In addition, the positive environmental criteria's have been identified with reference to the One City [Climate Strategy](#).

Investment Principles

The council's Ethical and Equitable Investment policy ensures that investments made will embed the following investment principles:

¹ Statutory Guidance on Local Government Investments, 3rd edition - https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/678866/Guidance_on_local_government_investments.pdf

² CIPFA: "Treasury Management in the Public Services: Code of Practice and Cross-Sectoral Guidance Notes, 2017 Edition

Principle 1: We will be active owners and incorporate ethical and equitable issues into our investment policies and practices, making sure investments or loans support the council's policies and objectives on such matters

Principle 2: We will not knowingly undertake direct investments or loans to organisations whose core activities or behaviour include practices which directly pose a risk of serious harm to individuals, groups or the environment or are inconsistent with the mission and values of the council

Principle 3: We will aspire to make investments that achieve positive social and/or environmental benefit and impact within Bristol alongside financial return

Principle 4: We will seek investees who incorporate ethical and equitable practises into their business practises. Where appropriate, we will actively engage with investees and use our influence to encourage ethical standards, practices, and lines of business acceptable to the council

Principle 5: We will incorporate equitable principles into our investment policy, to ensure investments reach and benefit disadvantaged groups and communities experiencing greatest inequity and who are typically under-represented when receiving investment

Principle 6: When current service investments or loans mature and funds are returned to the council, where appropriate we will consider recycling those funds back into investments that deliver ethical and equitable impact

Principle 7: We will explore different ways of working to improve our systems and procedures and remove barriers. This includes collaborative working and partnerships with co-investors and intermediaries to help manage risk and enhance opportunities to deliver positive social and environmental impact, as well as support equitable access to investment

Principle 8: Where practical, we will seek disclosure on positive impact regarding ethical and equitable issues by the entities in which we invest

Principle 9: We will report on our activities and progress towards implementing these Principles

Scope

The council holds three types of investments:

- Treasury investments, which are short to medium-term investments to manage surplus cash
- Service investments, which are investments made primarily for service benefit or impact - for example investment in a subsidiary and
- Service loans, which are loans made primarily for service benefit or impact - this does not include loans to another local authority as these are categorised as treasury investments.

Whilst grant investments do not fall within the statutory definition of investments as these are not expected to generate profits, due regard to this policy statement should be made when making a decision on grant investments.

The council's pension fund is held with the Avon Pension Fund administered by Bath and North East Somerset Council. The scheme's funds are invested entirely separately from those of the council, has its own policy for [Responsible Investment](#) and are subject to separate regulatory regimes to local authority investments. They are therefore not directly governed by this policy. However, the policy can be used to inform the views of the council's pension representative who feeds into matters such as the pension funds' Responsible Investment policy.

Ethical Review 1

This first ethical review ensures that the council does not knowingly undertake direct investment or borrowing activities with organisations/Sovereigns whose behaviour or core activities are deemed unethical. This may be controversial business practices which directly pose a risk of serious harm to individuals, groups or the environment, corporate behaviour which is in serious violation of widely accepted international norms, or core activities and behaviour which are inconsistent with the mission and values of the council.

This review applies to direct investments only, except in the case where the council has invested in an intermediary specifically to deploy investments and deliver impact. The council cannot guarantee approved financial institutions will not have clients or branches/offices/subsidiaries in countries that may breach the exclusions list.

In some instances, the council may allow the counterparty time to achieve compliance over a reasonable timeframe, taking into consideration the risks and opportunities specific to that business and its size and resources. The council

will only proceed with investment if we anticipate that the requirements of the policy will be met within the given timeframe. Any persistent delays in meeting the requirements would result in the council taking remedial action, which could be to cease funding or exit the investment.

Exclusion List

As part of this review, the council will exclude from consideration where there are consistent or significant transgressions of the appropriate regulatory framework or a failure to ignore directions of the regulatory body, investments in counterparties which have significant involvement with any of the activities or business practises on the following exclusions list:

Human Rights and Labour

- breaches of human rights principles
- breaches of international labour standards
- supports/are part of oppressive regimes
- modern slavery
- poor Health and Safety records

Environment

- toxic spills and releases
- negative impact on land use, habitats and biodiversity
- contributes to carbon intensive industries
- causes water resource scarcity
- poor supply chain management
- animal testing for cosmetic purposes / unnecessary exploitation of animals

Governance

- bribery/ fraud/ corruption
- violation of international intellectual property rights
- unethical market behaviour and business practise - for example, blocking competition

Controversial Business Activities

- alcohol – relating to manufacture, supply and distribution of alcoholic beverages
- gambling – relating to owning and/or operation of gambling establishments
- tobacco – relating to production, retail, distribution, or supply of tobacco products
- adult entertainment, such as pornography or violent material – relating to distribution and retail of adult entertainment products and/or services
- military or controversial weapons (Arms trade) – relating to manufacture or distribution of weapons
- fossil Fuel extraction
- nuclear industries
- exploitative credit providers – where credit has APR > 100% and provided in way that leads to significant harm to consumers
- third world debt exploitation

Other – for non-treasury investments only

- investments that don't generate any benefits within Bristol

Ethical Review 2

Where practical and applicable, we will prioritise investments that provide positive social or environmental impact by assessing whether they meet the positive criteria listed here. We will also prioritise those which will deliver the most impact (high impact return) and have greatest likelihood of delivering impact (low impact risk). The glossary provides more detailed definitions.

The positive criterions are not an exhaustive list as priorities and policies may change, but they provide a baseline for making investment decisions. Such investments are typically riskier and require longer term investment. Therefore, we will take a balanced portfolio approach, maximising the number of investments that provide positive social and/or environmental impact whilst balancing this with financial risk and return considerations.

Balanced Portfolio Approach

A balanced portfolio approach will enable the council to have a portfolio of investments that range from investments that deliver no impact but are less financially risky or more liquid (in other words accessible), to investments that deliver impact but are typically more financially risky or less liquid.

Impact is articulated through “Impact return”, the positive measurable impact generated and “Impact risk”, the likelihood that the investment does not achieve the desired impact. Whilst the aim is to transition our investments towards those that deliver impact, having a range of investments helps to diversify and thus reduce financial risk and liquidity issues.

In addition to managing risk, the balanced portfolio will also balance investments that address a range of challenges, from environmental issues to inequality. Appendix 1 sets out a table showing the spectrum of investments within the balanced portfolio, with investments providing greater impact to the right of the table.

This approach, which will be evaluated continuously, is preferable to setting percentage or monetary targets for investment, as this gives greater flexibility to respond to changes in priorities, economic outlook or the investment market as the responsible treasury investment market is still in the early stages of development.

Positive Criteria for Treasury Investments

The following positive criteria will be used to determine whether an investment is given greater priority when considering a range of investments to invest in. For treasury investments, whether priority is given based on positive criteria will need to be balanced against trade-off on yield since this could impact on the council’s ability to deliver services.

Where practical, ESG (Environmental, Social and Governance) investments that specifically fund ESG-related projects will be favoured over Responsible and Sustainable investments as the former provides direct impact whereas the latter is indirect. Greater priority will be given to investments with local impact and organisations that are living wage employers. Criterion outlined below carrying greater weighting is marked with an asterix*.

Responsible and Sustainable

- *counterparty pays Living Wage
- counterparty has ESG (environmental, social and governance) or Responsible Investment policy
- counterparty has Diversity and Inclusion policy
- counterparty is involved in projects addressing ethical or equitable issues - for example, runs free business support training for SMEs

*ESG Investments

- *investment specifically funds ethical and equitable projects locally within Bristol area
- investment specifically funds ethical and equitable projects - for example, funds renewable energy or SME businesses in deprived areas

Positive Criteria for Service Investments/Loans

The following positive criterion will be used to determine whether an investment is given greater priority when considering a range of investments to invest in. Some criteria carry greater weighting, indicated with an asterix*, for example, because they support the equitable investment principles. The criteria will be considered alongside the balance of portfolio, impact return, impact risk and alignment with current priorities as set out in the Corporate Strategy.

We will refer to the Social Value policy, National Social Value Measurement Framework, the [TOMs](#), as a means for measuring and scoring impact return.

Reduce Poverty and Inequality

- *targets geographical areas with deprivation or other marker for inequality such as income disparity or ethnicity
 - *targets population groups known to be economically disadvantaged or under-represented when receiving investments
- Both the above criteria will be linked to the Social Value policy
- *pays Living Wage
 - supports tackling homelessness
 - supports local employment

- supports the creation and retention of high-quality, sustainable jobs for local people

Increase the City's Resilience and Environmental Sustainability

- *the investment will lead to carbon emissions being reduced – supporting Bristol's Net Zero by 2030 target
- is a responsible buyer of goods and services
- provides jobs and skills related to the green economy
- improves ecology and biodiversity, within Bristol or elsewhere
- contributes to resilient food supply chain, with food and drink produced sustainably

Enhance Community Economic and Social Wellbeing

- *Bristol based investments - local investments focussed on creating impact in the city region, which in turn should create additional economic value in the area
- supports creation, sustainability and growth of micro, small and medium-sized enterprises
- supports local people with opportunities for life-long learning, skills development and experiences of work
- supports the creation, sustainability and growth of local community groups, voluntary groups and social enterprises
- promotes the involvement of local people and organisations in active citizenship such as volunteering and foster caring
- promotes the mental and physical health and well-being of local people
- supports the creation of high quality, affordable and sustainable homes and inclusive public spaces
- investment catalyses further investment into Bristol

Equitable Principles

The equitable investment principles enable investments to be used as a lever to help address equality issues affecting disadvantaged groups and communities in Bristol. The investments are intended to be inclusive and accessible to all.

Principles

We will ensure investments are equitable by applying the following principles:

Engaging with local groups

We will identify and engage with local disadvantaged and under-represented groups to make sure there is awareness of investment opportunities and to build confidence and ability for such groups to apply successfully for investment.

This could be through direct engagement with local communities or indirectly through intermediaries, linking with outreach programmes in order to maximise engagement reach with under-represented groups.

Targeting investment

Through our investment we will empower communities that experience the greatest inequity. We will place greater weighting on investments which invest in communities and enable greater self-determination. By investing in this way, we are building civic and social capital.

We will also favour investments that deliver positive impact around equality issues affecting Bristol, placing greater priority on those that deliver direct impact, but also recognising that some investments will have indirect impact. For instance, investment which reduces pollution could also address inequalities as less wealthier communities tend to live in areas of higher pollution ³.

Improving success

We will endeavour to identify and remove barriers that prevent local disadvantaged and under-represented groups from applying and being successful in securing investments. This may include providing support and training so those groups have equal opportunity of success when applying for investments or looking at alternative means of investments, such as asset transfers.

³ [Environmental inequality must not be ignored - GOV.UK \(www.gov.uk\)](https://www.gov.uk)

Collecting and monitoring equalities data

We collect equalities data specifically around investments to improve our intelligence and ensure we monitor and track progress towards making investment more equitable. Data will also ensure that our targeted investment approach is focussed on the correct areas and groups.

Governance

In order to give effect to its commitment to this policy the council will:

- apply this policy at the point of investment
- monitor investments thereafter, to review the operation and effectiveness of the policy, including any setting of annual targets
- report progress annually, including any breaches, within the annual Treasury Management Outturn Report

Investment Breaches - Ethical Review 1

Where a counterparty is found in breach of the exclusions list under ethical review 1, the council will look to divest. Any outstanding investments will be reviewed in accordance with the terms and conditions of the contractual arrangement. A cost benefit appraisal will be undertaken to minimise the cost of prematurely redeeming the investment.

Depending on the nature of the breach and the investment, the council may enter into dialogue with the counterparty to allow the counterparty the opportunity and time to address the breach. If the breach is not addressed within a given timescale or the counterparty is not seen to be making any progress, then the council would look to divest.

The Chief Finance Officer, Cabinet Member for Finance and the council's Treasury Management Advisors will be consulted when a breach of the exclusions list has been identified and breaches will be reported through the Treasury Management Outturn Report.

Glossary

Impact return	The positive, measurable social and environmental impact generated by the investment alongside any financial return, such as those outlined in the list of positive criteria under ethical review 2 or in the council's corporate strategy.
Impact risk	The risk that the investment does not achieve the desired impact. The likelihood that impact will be different than expected, and that the difference will be material from the perspective of the people and the planet who experience such impact.
Service investments	These are investments made primarily for service benefit or impact. Like treasury investments, these are also subject to financial risk considerations around security, liquidity and yield, but these are secondary concerns to service benefit or impact. Service investments could be investments in impact funds, wholly owned subsidiaries or in non-financial assets such commercial property.
Service loans	These are loans repayable with interest made to a third party, joint venture, subsidiary or associates. Like service investments, these are made primarily for service benefit or impact, with financial risk considerations around security, liquidity and yield being secondary. This does not include loans to another local authority as these are categorised as treasury investments.
Treasury Investments	These are investments made using treasury powers under section 15(1)(a) of the Local Government Act 2003 to manage surplus cash. These are typically short-term investments (duration of less than one year), as cash must be accessible as and when

payments need to be made by the organisation. Hence security followed by liquidity are primary financial considerations for local authority treasury investments, as stipulated by the Treasury Management Code. Yield is also a consideration, after security and liquidity, as greater yield means more funding for the council's services. Due to the restrictions set out in the Treasury Management Code, treasury investments are typically with financial institutions such as banks, building societies and money market funds.

Appendix - Balanced Investment Portfolio

	Treasury Investments			Service investments/loans		Grants
	Classic Investment	Responsible and Sustainable	ESG investment	Classic Investment	Service Investment	Grants
Purpose	Invest primarily for financial return			Invest primarily for Service impact/benefit		
Description	Investment focuses on SLY only	Investment incorporates ESG into its investment approach	Investment has direct impact on environmental, social or governance (ESG) issues	Invest for indirect social benefit/impact	Invest for direct social benefit/impact	Invest for service/ social benefit only (no profit)
Financial risk (security)	Low	Low	Low	Medium	Medium - High	N/A
Liquidity risk (liquidity)	Low	Low	Low	High	Medium - High	N/A
Financial return (yield)	Medium - Low	Medium - Low	Low (often lower vs classic)	Medium - High	Low - High	N/A
Impact risk	High	High	Medium	Medium	Low	Low
Impact return	Low	Low	Medium	Medium	High	High
Examples	Standard treasury investments	For example, Investment counterparty has an ESG or Responsible investment policy	For example, ESG investment that specifically funds environmental projects	For example, Commercial property	For example, Loan to Community bank	For example, Community Resilience Fund

Figure 3 - Table illustrating balanced portfolio of investments and associated financial and impact risks and returns

Flexible Use of Capital Receipts Strategy 2024/25 to 2025/26

Background and guidance

1. Capital receipts can only be used for specific purposes, and these are set out in Regulation 23 of the Local Authorities (Capital Finance and Accounting) (England) Regulations 2003 made under Section 11 of the Local Government Act 2003. The main permitted purpose is to fund capital expenditure, and the use of capital receipts to support revenue expenditure is not allowed by the regulations. The Secretary of State is empowered to issue Directions allowing expenditure incurred by local authorities to be treated as capital expenditure. Where such a direction is made, the specified expenditure can then be funded from capital receipts under the regulations.
2. In February 2021, the Secretary of State announced, alongside the local government finance settlement, the continuation of the capital receipts flexibility programme for a further three years, 2022/23, 2023/24 and 2024/25 to give local authorities the continued freedom to use capital receipts from the sale of their own assets (excluding Right to Buy receipts) to help fund the revenue costs of transformation projects and release savings. This is the principle upon which this strategy is based. It should be noted that the Secretary of State announced on 18 December 2023 consultation on further flexibilities for capital receipts including:
 - capitalising 'general cost pressures'
 - Extending 'flexible use of capital receipts to allow councils to borrow for revenue costs
 - New flexibilities for the use of proceeds of selling investment assets used for rent or capital appreciation only.
3. Should these proposals proceed a set of conditions will be attached to the new flexibilities. The consultation once closed can be expected to result in the government bringing forward legislation to permit the new flexibilities to be utilised by councils and should the council want to adopt these a revised policy will need to be submitted to Council and subsequently Ministers for approval.
4. This strategy provides background information under the statutory framework and guidance as at January 2024, it provides the principles on which the flexible use of Capital Receipts policy is based and its application within this authority.
5. Accordingly, the Secretary of State directs, in exercise of his powers under sections 16(2)(b) and 20 of the Local Government Act 2003 ("the Act"), that:
 - The expenditure for which the flexibility can be applied and treated as capital expenditure (known as 'Qualifying Expenditure'), should be:
 - Expenditure properly incurred by the authorities for the financial years that begin on 1 April 2022, 1 April 2023 and 1 April 2024
 - Expenditure for which local authorities cannot borrow, for example revenue costs of the service reforms.
 - Up-front (set up or implementation) costs for a proposal that is designed to generate future ongoing revenue savings in the delivery of public services and/or transform service delivery to reduce costs or the demand for services

- in future years for any of the public sector delivery partners; and
 - The expenditure for which the flexibility cannot be applied (Non Qualifying Expenditure), should be:
 - The ongoing revenue costs of the new processes or arrangements cannot be classified as qualifying expenditure.
 - Cost incurred with respect to redundancy payments, except where such redundancy costs are necessarily incurred and limited to the amounts available as statutory redundancy payments.
6. The key determining criteria to use when deciding whether expenditure can be funded by the new capital receipts flexibility is that it is forecast to generate ongoing savings to an authority's net service expenditure and examples of qualifying expenditure are outlined in Annex 2 of this strategy.

Objectives and purpose

7. The Corporate Strategy 2022 to 2027 sets out the council's vision for Bristol, including the key priorities to be delivered over the medium term. It links with other key strategies and contributes to the delivery of the long-term One City Plan and shared vision for the city.
8. The Corporate Strategy will lay the foundation for delivery of the vision and consists of 7 high level strategic themes:
- **Children and Young People** - City where every child belongs and every child gets the best start in life, whatever circumstances they were born in to.
 - **Economy and Skills** - Economic growth that builds inclusive and resilient communities, decarbonises the city and offers equity of opportunity.
 - **Environment and Sustainability**- Decarbonise the city, support the recovery of nature and lead a just transition to a low carbon future.
 - **Health, Care and Wellbeing** - Tackling health inequalities to help people stay healthier and happier throughout their lives.
 - **Homes and Communities** - Healthy, resilient and inclusive neighbourhoods with fair access to decent, affordable homes.
 - **Transport and Connectivity** - A more efficient, sustainable and inclusive connection of people to people, people to jobs and people to opportunity.
 - **A Development Organisation** - From city government to city governance: creating a focussed council that empowers individuals, communities and partners to flourish and lead.
9. This flexible use of capital receipts strategy is intended to support the council in delivering its objectives outlined against the themes, and potentially take advantage of the extension of the flexibility where appropriate to use capital receipts to fund transformation projects with qualifying criteria.

Historic Use of Capital Receipts Flexibility up to 2022/23

10. Since the flexibility was introduced, the council has applied £11.372 million of capital receipts for transformation and savings as outlined in table 1 in Annex 1 attached.
11. These programmes have been successful in delivering a combination of non-cashable / enabling savings to improve efficiency and effectiveness and cashable revenue savings which have reduced the net expenditure. Internal governance arrangements are in place

to monitor the delivery of agreed savings and details provided within quarterly finance reports to Cabinet.

12. Assurance in relation to the council's processes for monitoring the delivery of savings and for large transformation / efficiency programmes is provided by Internal Audit.
13. The 2022/23 budget proposal presented to Full Council in February 2022 (produced in line with the previous direction) included proposals to utilise the flexible use of capital receipts. However, from the capital receipts forecasted to be received during 2022/23 funding for the capital programme was prioritised and alternative funding sources identified for delivery of these programmes. This flexibility was not used in 2022/23.

Use of Capital Receipts Flexibility 2023/24 and 2024/25

14. In responding to the ongoing financial challenges facing the council, a Top 4 Transformation Programme was established as part of the 2023/24 budget strategy that included Adult Social Care, Childrens and Families and Temporary Accommodation. In addition, a Property Programme was included as an enabler to provide an opportunity to rationalise the operational running costs of the estate and asset holdings and in so doing generate capital receipts.
15. The amount of planned capitalisation using the flexibility for 2023/24 and 2024/25 is £20 million of which £8 million is forecast to have been utilised in the financial year 2023/24 and the remaining £12 million is forecast to be applied in 2024/25. The value of expenditure capitalised must not exceed the amount set out in the plan, unless approved by Full Council and the updated plan is provided to the Secretary of State. If capital receipts generated are insufficient to meet these commitments, other funding sources will need to be identified or expenditure reduced. These amounts will support the ongoing delivery of the transformation programmes alongside an additional £6.14 million of one-off revenue transformation funding (with delegations to CLB) to be prioritised towards delivering cashable savings within a relatively short payback period.
16. The programmes in tables 2 & 3 (Annex 1) have been included in this strategy as being potentially eligible for capital receipts funding to support their delivery (subject to its availability and their approval), with a description of the programme, its objectives and potential planned use of receipts.
17. The proposals illustrated in tables 2 & 3 (subject to their approval) will directly support the release of net financial benefits committed to in the budget. This list is not definitive and subject to availability of this value of receipts. Should further or more priority programmes / projects with qualifying expenditure be identified during the course of the year, further revisions will be made to the strategy and will be requested through the relevant channels for resubmission in line with the council's Policy and Budget Framework Rules.
18. Table 4 (Annex 1) details the planned savings set out over the medium-term period in the council's budget from which alternative propositions may be identified and further detail is set out in the budget report.

Disposals

19. Local authorities will only be able to use capital receipts from the sale of property, plant and equipment received in the years in which this flexibility is offered. They may not use their existing stock of capital receipts to finance the revenue costs of reform.
20. It is a condition that the disposal of assets by which the capital receipts are obtained must be disposals by the local authority outside the “group” structure. Here “group” has the same meaning as defined in “group accounts” in the Code of Practice on Local Authority Accounting, as issued by Chartered Institute of Public Finance and Accountancy (CIPFA), whether or not these transactions are consolidated into group accounts and irrespective of whether the authority produces group accounts.
21. Capital receipts are primarily used to fund capital investment which has a relatively short economic life, such as IT investment where borrowing is not economical. Excluding land disposals to Goram Homes, there is a further need to generate nearly £80.0 million of capital receipts to fund the future general fund capital programme, including £20.0 million for transformation using this flexibility. At the end of the financial year 2023/24 the council estimates to have £20.09 million of capital receipts towards the overall financing requirement. Work is continuing to develop the future pipeline of disposals to enable the council to meet the remaining funding commitments (£60.0m) as set out in the approved capital programme and this strategy.
22. The pipeline of disposals will need to be closely monitored to ensure sufficient cash resource is available prior to projects being committed to prevent any consequential budget pressures. Should the disposal programme not progress as currently profiled other funding sources will need to be identified or programmes and projects reduced.

Impact of 2024/25 strategy on Prudential Indicators

23. The guidance requires that the impact on the council’s Prudential Indicators should be considered when preparing a Flexible Use of Capital Receipts Strategy. These capital receipts have not been factored into the council’s Capital Financing Requirement (CFR) by way of either reducing debt or financing capital expenditure.
24. Capital receipts which are allocated to fund the council’s capital programme have been allocated, will be monitored throughout the year and will not be subsequently used to fund qualifying expenditure. Therefore, there will be no change to the council’s Prudential Indicators that are contained in the Treasury Management Strategy Statement which will be presented to Full Council in February 2024 for approval.
25. The prudential indicators show that this strategy is affordable and will not affect the council’s operational boundary and authorised borrowing limit.
26. In using the flexibility, the council will have due regard to the Guidance on Flexible Use of Capital Receipts issued by the Secretary of State under section 15(1)(a) of the Act, the requirements of the Prudential Code, the CIPFA Local Authority Accounting Code of Practice and the current edition of the Treasury Management in Public Services Code of Practice.

Governance

27. It is a condition that local authorities applying this direction must send details of their planned use of the flexibility to the Secretary of State for each financial year in which the direction is used.
28. This should be sent as soon as is practicable after the council has determined and approved its strategy for the use of the direction but must be sent before the flexibility is used. Where local authorities update their plans during the financial year, an updated plan reflecting the changes must be sent to the Secretary of State. This requirement can be met by providing to the Secretary of State a copy of the authority's own planning documents.
29. By submitting the information set out to the Secretary of State the council will have met the condition; there is no further requirement to receive explicit consent in order to use the flexibility as set out in this direction. It is expected that the council will evidence compliance in full with this condition to their external auditors as necessary.
30. The strategy will be presented with the budget annually to Full Council for approval.

Table 1: Historic Use of Capital Receipts Flexibility up to 2022/23

Project	Description / Benefits	Qualifying Expenditure							
		16/17 £m	17/18 £m	18/19 £m	19/20 £m	21/22 £m	22/23 £m	23/24 £m	Total £m
		Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual
Organisational Business Change	Programme to right size and shape how the organisation works to make it more effective, streamline processes and deliver operational efficiencies, which were reduced from net expenditure.	5.300	-	-	-	-	-	-	5.300
Transformation Project Management	Project management capacity to support the delivery of the agreed £76 million 2018 medium term savings programme and delivery of specific savings with qualifying expenditure within it. IT transformation and Strengthening Families are included in this programme.	-	-	-	0.400	-	-	-	0.400
IT Transformation Programme	Transform ICT service to deliver an efficient, modern, secure, flexible service which supports delivery of the Corporate Strategy. Cashable and non-cashable efficiencies have been generated from reducing support costs, facilitating remote working and more recently hybrid working post pandemic.	-	-	-	2.172	3.203	-	-	5.375
Strengthening Families	The programme objective was a system-wide transformation of children's services, which succeeded in making savings in external placement costs; however wider service demands mean the budget could not be reduced.	-	-	-	0.297	0.060	-	-	0.297
Total		5.300	0.000	0.000	2.809	3.263	0.000		11.372

Table 2: 2023/24 Planned / Forecast Use of Capital Receipts Flexibility

Project	Qualifying Expenditure Estimate £m	Transformation Programme Benefits	Transformation Projects
Reduce Council Owned Property	6.000	In light of continued new ways of working this programme is to enable the council to review its asset holdings to ensure assets that no longer meet the business operational need can be rented out / leased to other public and private sector partners, so the council is able to benefit from lower cost or higher rental income. Where this is not feasible the asset will be disposed of to generate a useable capital receipt for financing future investment and/or reducing debt.	Illustrative projects include: the rationalisation of office space allowing the NHS to lease 1600 sqm of commercial office space in 100 Temple Street (FY saving £1.3m, 22/23 £0.3m); commercial estate rent reviews (£1.5m saving), renting out office / storage space to the HRA (£0.4m saving), commercial lease for fleet vehicles for use in the HRA function (£0.5m saving), review of corporate landlord function, capacity and structure (£0.9m saving)
Transformation Project - Top 4 Delivery Capacity	2.000	Project management, commissioned support and delivery partner service capacity to support the timely delivery of the savings targets agreed within each directorate. This funding is to be applied to the delivery of specific workstreams and savings within qualifying expenditure within it, a number of which are illustrated below.	
Adult Social Care Transformation		To develop a sustainable model of care that builds upon community assets and improves outcomes whilst delivering within budget. Working with a strategic delivery partner, a range of workstreams/initiatives for delivering efficiencies have been identified.	The programme is made up of a number of workstreams and initiatives the main ones being: reducing the cost of the adult purchasing costs aligned to the outcomes from the Peopletoo diagnostic report which is forecast to save £4.3m; the realignment of Bristol Community Links services (£1m saving); a revised target operating model and management restructure (£2.0m saving); recommissioning of Redfield Lodge pathway beds (£0.370m saving); the closure of the South Bristol Rehabilitation Centre (£0.408m saving).
Our Families Programme		The programme will design effective services with, and for, children, young people and families and efficiency of delivery will improve as a result through a whole system change. A range of workstreams across all aspects of the service have been identified for change including home to school transport, early intervention and prevention services, enhancing in house carer sufficiency.	The transformation programme consists of 3 main and illustrative projects: 1. Operating Model and Workforce - introduction of a new target operating model with new ways of working including a new practice offer, improved organisational development and talent management (£1.68m) 2. Demand Management - including the redesign of: home to school transport, management of care transitions, enhanced early intervention and prevention, lean business processes (£1.24m) 3. Commissioning and Partnerships - introduction of a single commissioning hub, develop a single supported housing pathway, working better together with health and police (£0.87m)
Temporary Accommodation Need		This programme aims to reduce the costs of providing temporary accommodation to those with immediate housing needs. We will do this by creating new temporary accommodation, making use of existing properties, including council housing and working with partners to source and commission available properties more cost effectively. This will reduce our spend on expensive and inappropriate accommodation like hotels.	The main programme has made available new temporary accommodation through the use of general needs properties (saving £0.500m), the move to a new single emergency accommodation commissioning albeit the 'go live' date has been delayed (saving £0.141m), the introduction of more private lettings from October (£0.287m) and the lease / refurbishment of an ex NHS nursing accommodation block for 11 families (saving 0.147m)
Total Potential Spend	8.000		

Table 3: 2024/25 Future Use of Capital Receipts Flexibilities

Project	24/25 Estimate £m	Description / Benefits	25/26 Estimate £m	26/27 Estimate £m	27/28 Estimate £m
Transformation Programme - incl Top 4 Delivery Capacity Projects	*12.000	Project management, commissioned support and delivery partner service capacity to support the timely delivery of the savings targets agreed within each directorate. This funding is to be applied to the delivery of specific workstreams and savings within qualifying expenditure within it, a number of which are illustrated below.			
Reduce council Owned Property		In light of continued new ways of working this programme is to enable the council to review its asset holdings to ensure assets that no longer meet the business operational need can be rented out / leased to other public and private sector partners, so the council is able to benefit from lower cost or higher rental income. Where this is not feasible the asset will be disposed of to generate a useable capital receipt for financing future investment and/or reducing debt. Illustrative projects include: the office rationalisation of 100 Temple square that will see a long term commercial lease for 1600 sqm to the NHS that will realise £1.3m of rental income pa and the availability of short term leases for approx 2,200 sqm at commercial office rates; the rationalisation of locality office space and the maturity of the corporate landlord model across the council including the reversion of the Hard FM contract.	4.800	4.800	4.800
Adult Social Care Transformation		To develop a sustainable model of care that builds upon community assets and improves outcomes whilst delivering within budget. Working with a strategic delivery partner, a range of workstreams/initiatives for delivering efficiencies have been identified. The main project is the full implementation (year 2) of the Peopletoo diagnostic report into adult purchasing including the new target operating and social care practice model and the focus on reducing both the demand and cost of care packages.	10.402	10.402	10.402
Our Families Programme		The programme will design effective services with, and for, children, young people and families and efficiency of delivery will improve as a result through a whole system change. A range of workstreams across all aspects of the service have been identified for change including home to school transport, early intervention and prevention services, enhancing in house carer sufficiency. This is broadly both a continuation and acceleration of the 23/24 programme and workstreams highlighted in Table 2.	3.800	3.800	3.800
Temporary Accommodation Need		This programme aims to reduce the costs of providing temporary accommodation to those with immediate housing needs. We will do this by creating new temporary accommodation, making use of existing properties, including council housing and working with partners to source and commission available properties more cost effectively. This will reduce our spend on expensive and inappropriate accommodation like hotels and is both a continuation and acceleration of the current initiatives aligned to the 24/25 capital programme that provides opportunity to enhance the council's approach to capital "invest to save" subject to a full business case.	4.071	4.071	4.071
Total Potential Spend	12.000		23.073	23.073	23.073
Note: *£2m was approved as part of the 2023/24 Use of Capital Receipts Flexibilities Policy approved by Full Council					

Table 4: Medium Term Savings – 2024/25

	24/25 £m	25/26 £m	26/27 £m	27/28 £m	28/29 £m	Total £m
Adults, Community & Public Health	11.009	1.906	0.468	0	0	13.383
Childrens & Education	5.315	3.280	1.633	0.547	0.029	10.803
Growth & Regeneration	5.597	(0.057)	0.760	0.810	(0.353)	6.757
Resources (& Shareholding)	1.775	0.160	0.150	0	0	2.085
Corporate	10.300	(4.000)	0	0	0	6.300
TOTAL SAVINGS	33.996	1.289	3.011	1.357	(0.324)	39.328

Examples of qualifying expenditure

There are a wide range of projects that could generate qualifying expenditure and the list below is not prescriptive. Examples of projects include:

- Sharing back-office and administrative services with one or more other council or public sector body;
- Investment in service reform feasibility work, eg setting up pilot schemes;
- Collaboration between local authorities and central government departments to free up land for economic use;
- Funding the cost of service reconfiguration, restructuring or rationalisation (staff or non-staff), where this leads to ongoing efficiency savings or service transformation;
- Sharing Chief-Executives, management teams or staffing structures;
- Driving a digital approach to the delivery of more efficient public services and how the public interacts with constituent authorities where possible;
- Aggregating procurement on common goods and services where possible, either as part of local arrangements or using Crown Commercial Services or regional procurement hubs or Professional Buying Organisations;
- Improving systems and processes to tackle fraud and corruption in line with the Local Government Fraud and Corruption Strategy – this could include an element of staff training;
- Setting up commercial or alternative delivery models to deliver services more efficiently and bring in revenue (for example, through selling services to others);
- Integrating public facing services across two or more public sector bodies (for example children’s social care, trading standards) to generate savings or to transform service delivery.



Bristol's Budget

2024/25



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Executive summary

ES1 Bristol City Council Budget 2024/25

The council's budget proposals will be considered by Cabinet on 23 January 2024 for recommendation to Full Council to consider and agree on 20 February 2024.

The budget sets out how much money the council will be able to spend on each service area. As part of the budget, Full Council will decide on the level of Council Tax and Social Care Precept¹ for 2024/25.

Bristol City Council is spending around £1.051 billion² this year (2023/24) providing services to the people of Bristol. In 2023/24, 40% of this budget is raised locally through Council Tax (£263 million; 25%) and Business Rates (£154 million; 15%). The remaining 60% (£634 million) of funding comes from grants from the government (£451 million; 43%), income we make from fees and charges for some services we provide (£137 million; 13%), contributions from other organisations (£41 million; 4%), and income from investment (£5 million; less than 1%).

The budget decisions for 2024/25 will again be made in the context of acute financial pressures due to rising costs, continuing constraints on government funding, and increasing demand for the services the council provides. Based on our current forecasts, we face a funding gap over the next five years (from 2024/25 to 2028/29) of between £4.7 million and £81.2 million, with a realistic assumption of £32 million³. This is in addition to the £13.6 million of savings and efficiencies proposals for 2023-2028 outlined in the 2023/24 budget.

Each year, the government sets a limit for the maximum amount councils can increase core Council Tax without holding a local referendum. The government also sets the maximum level of Social Care Precept local authorities can charge. The government announced the proposed 2024/25 referendum limits for Council Tax (up to 3%) and Social Care Precept (2%) in the [Provisional local government finance settlement: England, 2024 to 2025](#) on 18 December 2023. This was after the start of the council's budget consultation.

Each 1% increase in Council Tax would raise approximately £2.7 million. If the council increases Council Tax by 3%⁴ and adds an additional Social Care Precept of 2% in 2023/24, we estimate there would still be a substantial funding gap in the council's core budget in 2024/25. If we do not increase Council Tax or levy a Social Care Precept, the funding gap would be even greater; by up to £13.7 million more. With such a significant challenge the budget cannot be balanced without more funding, making greater efficiencies (doing the same for less money) and, in some cases, stopping doing some things entirely.

¹ Social Care Precept is a levy on top of core Council Tax, which is dedicated to help fund adult social care.

² The £1.051 billion is general fund revenue and excludes capital and ringfenced funds.

³ The wide range in these forecasts is due to national economic uncertainties (such as inflation and interest rates), the council's ability to manage demand and risks, and unknown levels of future government funding.

⁴ The council is permitted to raise Council Tax by **up to 3%** in 2023/24. Where we refer to a 3% increase in Council Tax, this is shorthand for an increase of 2.99%

ES2 The Budget 2024/25 consultation

The Budget 2024/25 consultation took place between 9 November and 21 December 2023. It sought views from the public (including businesses and organisations which represent non-domestic rate payers⁵) on options for the level of Council Tax and Social Care Precept in 2024/25, and proposals for how the council might save money and generate income to help bridge the forecast funding gap. The responses to the consultation have helped to inform final budget recommendations and will be taken into consideration by the Cabinet and by Full Council when making their decisions in January and February 2024.

The Budget 2024/25 consultation sought feedback on the following.

- Options for the level of core Council Tax people would prefer in 2024/25. Options were no increase, a 1% increase, a 2% increase or a 3% increase, each of which would have different implications for how much money the council could spend on general services.
- Options for the level of Social Care Precept they would prefer in 2024/25 to support the delivery of adult social care, in addition to the increase in core Council Tax for general services. Options were no Social Care Precept, a 1% Social Care Precept, or a 2% Social Care Precept.
- Whether respondents would be prepared to pay an increase of more than 3% in core Council Tax and/or more than 2% Social Care Precept if the government permits this in 2024/25. The [Provisional local government finance settlement: England, 2024 to 2025](#) on 18 December 2023 set out that these larger increases would not be permitted.
- Respondents' reasons for the level of Council Tax and Social Care Precept they would prefer, and any suggestions they have for how the council could save money or generate income⁶.

The budget consultation comprised [information about the council's financial position](#) and an [online survey](#). [Easy Read](#) and [British Sign Language](#) formats were also available online on the Consultation and Engagement Hub. Paper copies of the survey were available in libraries and on request. Alternative accessible formats, including language translations, were available on request.

The consultation was widely publicised through media, social media and communications with the public, including partner organisations, non-domestic rate payers and other stakeholders, as described in section 2.2.

⁵ The council has a statutory duty to consult each year with representatives of non-domestic rate payers about the authority's proposals for expenditure in the forthcoming year. The activities undertaken to consult representatives of non-domestic rate payers are described in section 2.2.4.

⁶ The consultation included information about [25 proposals to reduce our costs and increase income](#) to help balance the budget. We also described [11 'invest to save' ideas](#) (ways we might use capital investment to reduce our costs in the long term). We did not include specific questions about these other proposals because we do not think they are likely to mean major changes to services the council provides. However, people could provide feedback on any of the proposals as part of their free text comments in the survey.

ES3 Scope and use of this report

This consultation report describes the methodology and presents the feedback received in the Budget 2024/25 consultation. It includes quantitative data for all 2,547 survey responses and analysis of the 1,146 survey free text responses (question 5) and 12 email responses.

This consultation report does not contain the council's recommendations for the level of Council Tax increase or Social Care Precept (if any) in 2024/25, nor an assessment of the feasibility of any of the suggestions received. The consultation feedback that is summarised in this report has been taken into consideration by officers when developing final proposals for the level of Council Tax and Social Care Precept, and ways to balance the budget gap in 2024/25. The final proposals are included in a separate report which, together with this consultation report, will be considered by Cabinet on 23 January 2024. Full Council will take into consideration this consultation report and responses when making its decisions about the 2024/25 budget at the Full Council meeting on 20 February 2024.

Budget decisions will be published through normal procedures for Full Council and Cabinet decisions at democracy.bristol.gov.uk

ES4 Budget 2024/25 consultation - Key findings

ES4.1 Response rate

The Budget 2024/25 consultation survey received 2,547 responses.

2,082 responses (82%) were received from postcodes within the Bristol City Council area, 23 (1%) were from South Gloucestershire, Bath & North East Somerset (B&NES), and North Somerset. A further 54 (2%) were from unspecified locations within the four West of England authorities⁷. 385 (15%) did not provide a postcode.

Analysis of respondents' postcodes shows that there was under-representation of responses from the most deprived 30% of the city, and response rates from the least deprived 20% of the city were over-represented. People with the following protected characteristics were under-represented compared to the proportion of people in these groups living in Bristol:

- Children and young people aged 24 years and younger, and people aged 85 and older
- Respondents of Asian or Asian British backgrounds; Black, Black British, Caribbean or African backgrounds; Mixed or multiple ethnic groups; and other ethnic backgrounds
- Christians, Muslims, Hindus and Sikhs
- Female respondents
- Heterosexual respondents.

A map of response rate by ward for the Bristol respondents is presented in Chapter 3 along with the details of age profile, sex and other respondent characteristics.

⁷ Incomplete postcodes identified the home location as within the WOE authorities area (Bristol, B&NES, North Somerset and South Gloucestershire), but not which authority.

ES4.2 Level of Council Tax increase and Social Care Precept in 2024/25

Core Council Tax

Of the 2,485 people who stated their preference for the level of Council Tax, a majority (1,641 respondents; 66%) favour an increase in core Council Tax to support general services in 2024/25.

- 1,046 (42%) would prefer a 3% increase in core Council Tax. This is the option with the highest support.
- 316 (13%) favour a 2% increase.
- 279 (11%) favour a 1% increase.
- 844 (34%) respondents would prefer 'no increase to Council Tax' in 2024/25. This is the option with the second highest support.
- 62 respondents did not give a view on Council Tax.

Social Care Precept

Of the 2,494 people who stated their preference for the level of Social Care Precept, a majority (1,498 respondents; 60%) favour some Social Care Precept (on top of core Council Tax) to support the delivery of social care in 2024/25.

- 932 (37%) would prefer a 2% Social Care Precept. This is the option with the second highest support
- 566 (23%) favour a 1% Social Care Precept
- 966 (40%) respondents would prefer no Social Care Precept in 2024/25. This is the option with the highest support
- 53 respondents did not give a view on Social Care Precept.

Combinations of core Council Tax and Social Care Precept

Figure ES1 shows the percentage of 2,547 survey respondents who prefer each combination of Council Tax increase (0%, 1%, 2% or 3%) and Social Care Precept (0%, 1% or 2%) proposed in the consultation.

In Figure ES1, each of the coloured rectangles represents a combination of one Council Tax option (0%, 1%, 2% or 3%) and one Social Care Precept option (0%, 1% or 2%). For example, the top left green rectangle is the combination of no increase to Council Tax and no Social Care Precept. 28% of respondents favour this option. Options with lower support appear red; those with higher support are green.

The numbers in the coloured circles show the total percentage increase in Council Tax plus Social Care Precept for each combination. For example, ② indicates a 2% total increase.

Figure ES1: Preferred combinations for Council Tax and Social Care Precept

Percentage of respondents who prefer each combination of Council Tax and Social Care Precept

	No additional Social Care Precept	An additional 1% Social Care Precept	An additional 2% Social Care Precept	No view on Social Care Precept
No increase to Council Tax	28% 0	3% 1	2% 2	0.3%
1% increase to Council Tax	3% 1	7% 2	1% 3	0.1%
2% increase to Council Tax	3% 2	6% 3	3% 4	0.1%
3% increase to Council Tax	5% 3	6% 4	30% 5	0.2%
No view on Council Tax	0.4%	0.2%	0.3%	1%

Key

- 0 No change to Council Tax or Social Care Precept
- 1 1% increase from Council Tax plus Social Care Precept
- 2 2% increase from Council Tax plus Social Care Precept
- 3 3% increase from Council Tax plus Social Care Precept
- 4 4% increase from Council Tax plus Social Care Precept
- 5 5% increase from Council Tax plus Social Care Precept

Figure ES1 shows that:

- The option with the highest support (30% of 2,547 respondents) is a 3% increase in core Council Tax and a 2% Social Care Precept. This is the maximum increase permitted under government limits announced on 18 December 2023 in the [Provisional local government finance settlement: England, 2024 to 2025](#)
- The second most popular option (28% of 2,547 respondents) is no increase in core Council Tax and no Social Care Precept.
- The third most popular option is 1% increase in core Council Tax and 1% Social Care Precept. This has substantially lower support (7% of 2,547 respondents).
- For options where Council Tax and Social Care Precept are not the same, more people favour a higher increase in Council Tax than Social Care Precept. For example:
 - 6% favour 2% increase in core Council Tax with 1% Social Care Precept, compared to 1% who prefer a 1% increase in core Council Tax with 2% Social Care Precept
 - 3% favour 2% increase in core Council Tax with no Social Care Precept, compared to 2% who prefer no increase in core Council Tax with 2% Social Care Precept.

ES4.3 Differences in views on the level of Council Tax in areas of high and low deprivation

Views on the preferred level of core Council Tax increase (0%, 1%, 2% or 3%) were compared for respondents in areas with different levels of deprivation (Figure ES2). The comparison looked at levels of deprivation in 10 bands (known as ‘deciles’) from decile 1 (most deprived) to decile 10 (least deprived).

Figure ES2 also shows the views of people who did not provide a postcode or gave a non-Bristol postcode, and the combined views of all respondents.

Figure ES2: Preference in each deprivation decile for the core Council Tax options

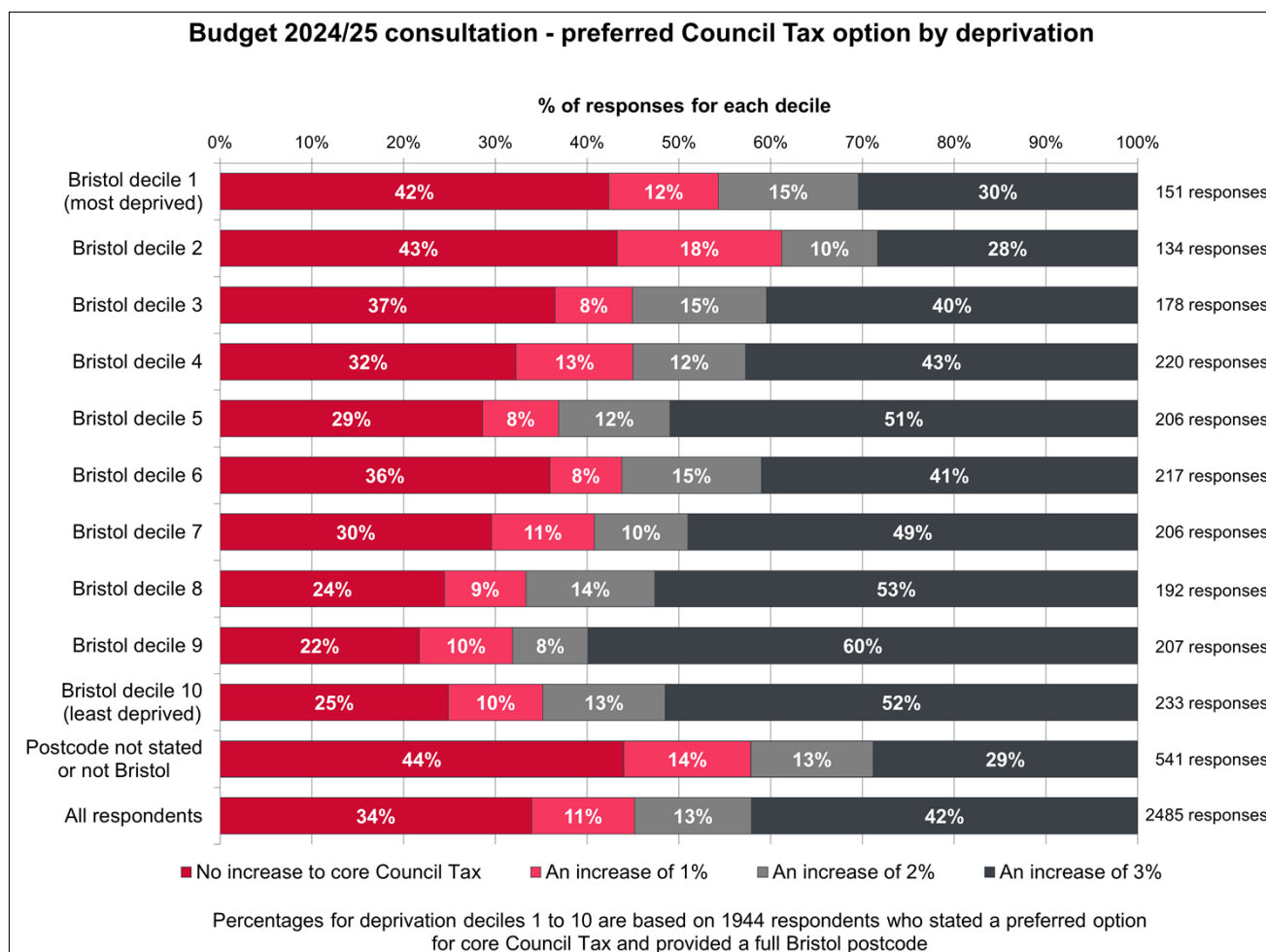


Figure ES2 shows that people living in less deprived areas tend to support higher levels of core Council Tax.

Support for a maximum **3% increase** in Council Tax is highest in the least deprived 30% of Bristol (60% of respondents prefer a 3% increase in decile 9, 53% in decile 8, 52% in decile 10). Support is lowest in the most deprived 20% of areas (30% in decile 1, 28% in decile 2).

Support for **no increase** in core Council Tax is highest for respondents in the most deprived 20% of Bristol (42% of respondents in decile 1, 43% in decile 2). Support for no increase reduces to 22% in decile 9, 24% in decile 8, 25% in decile 10 (the least deprived 30%).

A 3% increase in Council Tax is the most popular option in all deciles except the most deprived deciles 1 and 2. For deciles 1 and 2, no increase is the preferred option.

Support for 1% and 2% increases in Council Tax do not show a clear trend between more deprived and less deprived areas.

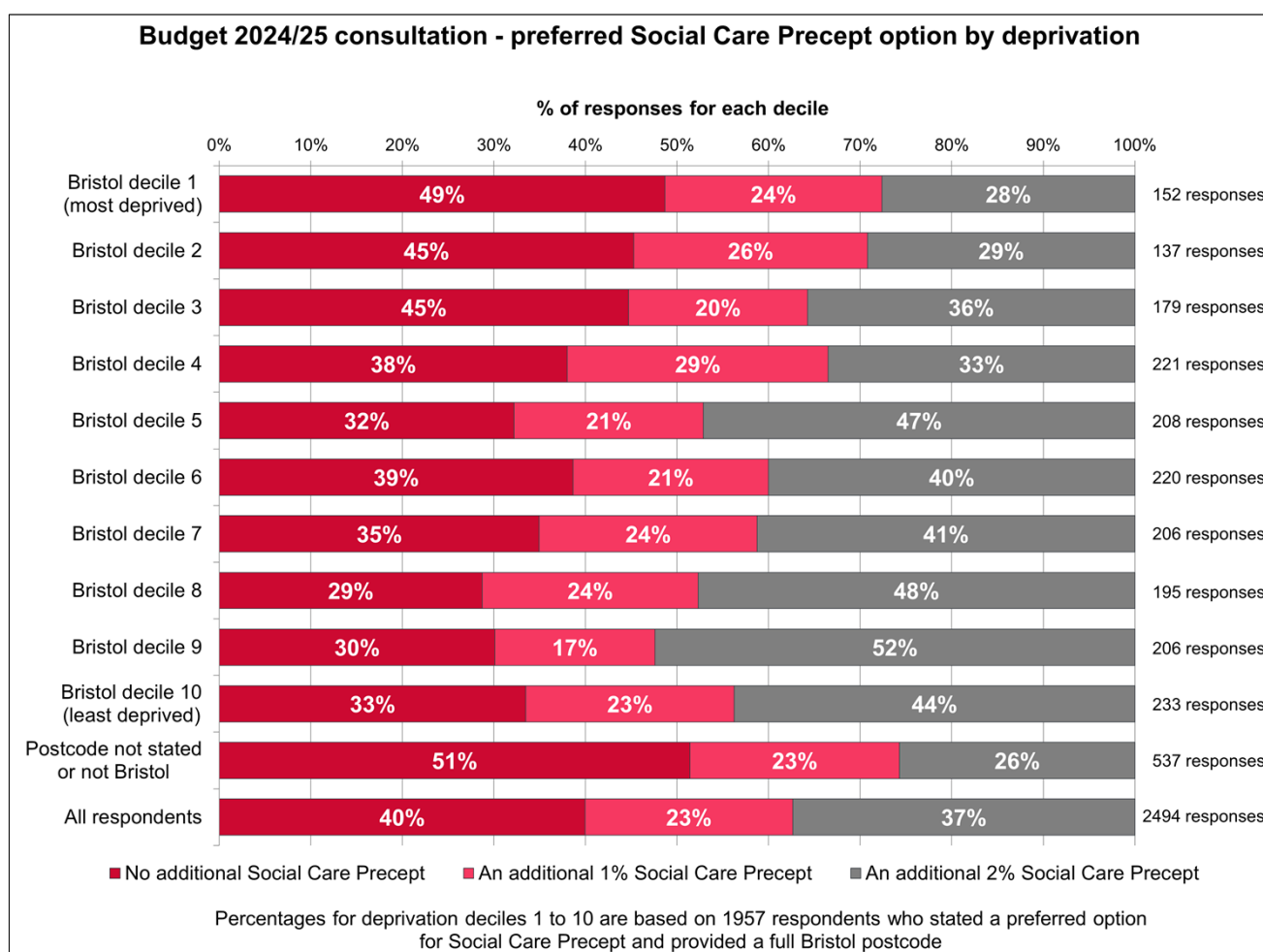
The views of respondents who did not provide a postcode or gave a non-Bristol postcode are similar to an average of the most deprived deciles 1 and 2. 44% in this group favour no increase and 29% support a 3% increase.

ES4.4 Views on the level of Social Care Precept in areas of high and low deprivation

Views on the preferred level of Social Care Precept (0%, 1% or 2%) were also compared for respondents in areas with different levels of deprivation (Figure ES3).

Figure ES3 also shows the views of people who did not provide a postcode or gave a non-Bristol postcode, and the aggregate views of all respondents.

Figure ES3: Preference in each deprivation decile for the Social Care Precept options



As with core Council Tax, support for a Social Care Precept is highest in the least deprived areas.

Support for no Social Care Precept ranges from 49% in decile 1 (most deprived) to 29% in decile 8 (with slightly higher figures of 30% in decile 9 and 33% in decile 10). Conversely, support for 2% Social Care Precept increases from 28% in decile 1 to 52% in decile 9 (44% in decile 10).

A 2% Social Care Precept is the most popular option in deciles 5 to 10. In the most deprived deciles 1 to 4, preference for no Social Care Precept exceeds support for a 2% precept.

A 1% Social Care Precept is the least popular option in all deciles.

The views of respondents who did not provide a postcode or gave a non-Bristol postcode are similar to the most deprived decile 1. In this group, 51% favour no increase and 26% support a 2% increase.

Comparison of Figures ES2 and ES3 shows a greater willingness to pay more Council Tax than Social Care Precept. More people support the maximum 3% increase in Council Tax than support the maximum 2% Social Care Precept, for all deprivation deciles except decile 2. This is also the case for respondents who provided no postcode or a non-Bristol postcode.

ES4.5 Views on increasing Council Tax more than 3% and Social Care Precept above 2%

The Budget 2024/25 consultation was launched before the government announced the limits for the level of Council Tax increase or Social Care Precept for 2024/25. To ensure we could take into account the public's views on any possible scenario the government might announce, respondents were asked if they would be prepared to pay an increase of more than 3% in core Council Tax and/or more than 2% Social Care Precept, if the government announced this is permitted in 2024/25.

Figure ES4 shows the percentage of the 2,547 respondents who prefer each combination of the options for Council Tax increase above 3% and Social Care Precept of more than 2%. Each of the coloured rectangles represents a combination of one Council Tax option (no increase above 3%, or increases of 4%, 5%, or 6% or more) and one Social Care Precept option (no precept above 2%, or a precept of 3%, 4%, or 5% or more).

















Figure ES4 shows that:

- The option with the highest support (57% of 2,547 respondents) is no increase above 3% to core Council Tax and no Social Care Precept above 2%.
- The second most popular option is an increase of 6% or more to Council Tax and a Social Care precept of 5% or more. This is the maximum option included in the budget consultation. This option has substantially lower support (9% of 2,547 respondents) than the no further increases option.











The [Provisional local government finance settlement: England, 2024 to 2025](#) published on 18 December 2023 set out that these larger increases would not be permitted in 2024/25.

Figure ES4: Views on combinations of higher Council Tax and Social Care Precept

Percentage of respondents who prefer each combination of Council Tax increase above 3% and Social Care Precept above 2%

	No Social Care Precept above 2%	An additional 3% Social Care Precept	An additional 4% Social Care Precept	An additional 5% or more Social Care Precept	No view on Social Care Precept above 2%
No increase above 3% to Council Tax	57% 	6% 	1% 	1% 	1%
4% increase to Council Tax	4% 	7% 	1% 	1% 	0.4%
5% increase to Council Tax	1% 	2% 	3% 	2% 	0%
6% or more increase to Council Tax	1% 	0% 	0% 	9% 	0%
No view on an increase above 3% to Council Tax	1%	0.1%	0.1%	0.1%	1%

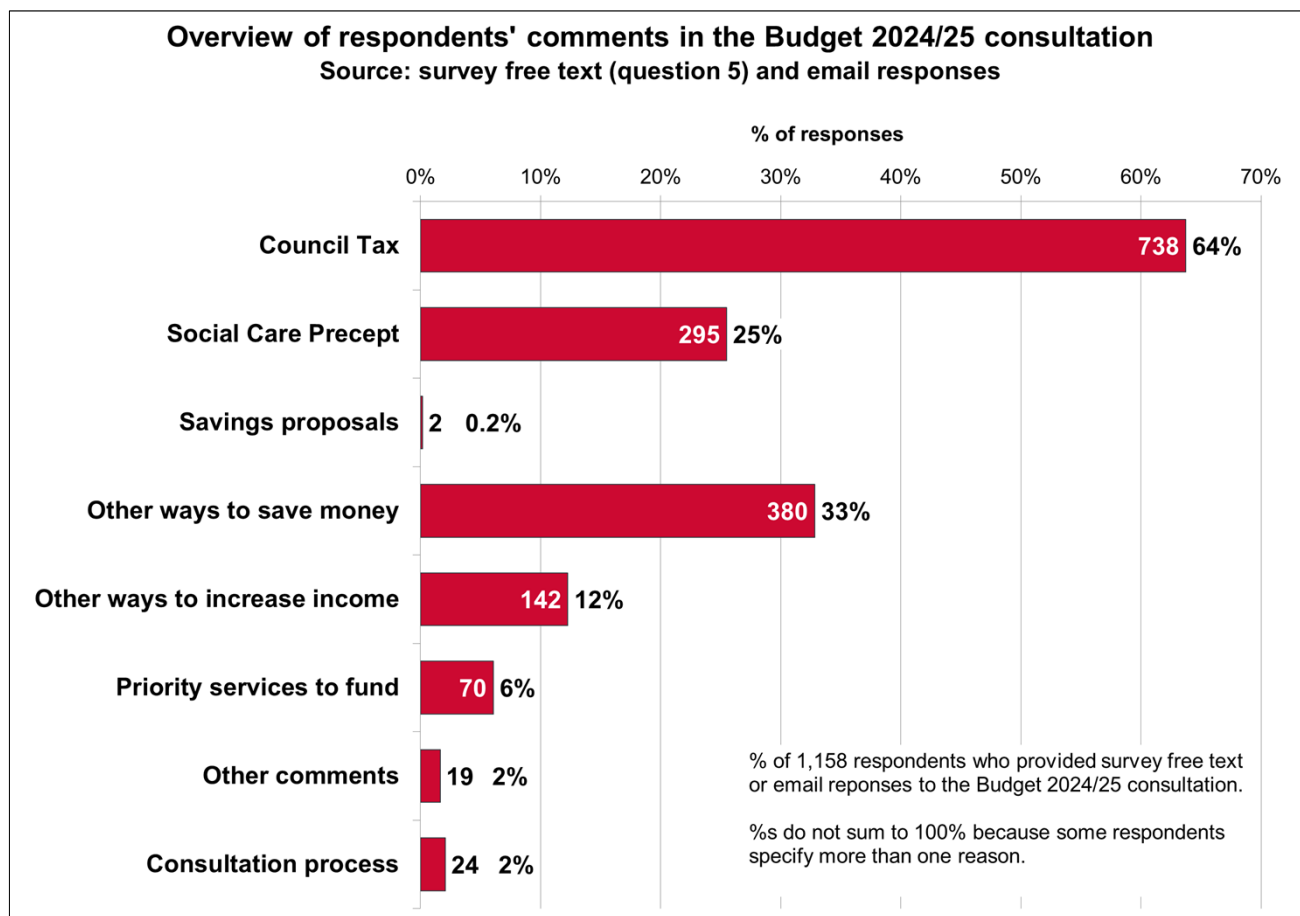
Key

-  No more than 5% increase from Council Tax plus Social Care Precept
-  No more than 6% increase from Council Tax plus Social Care Precept
-  No more than 7% increase from Council Tax plus Social Care Precept
-  No more than 3% increase from Council Tax plus 5% or more Social Care Precept OR no more than 2% Social Care Precept plus 6% or more increase in Council Tax
-  7% increase from Council Tax plus Social Care Precept
-  8% increase from Council Tax plus Social Care Precept
-  9% increase from Council Tax plus Social Care Precept
-  9% or more increase from Council Tax plus Social Care Precept
-  10% or more increase from Council Tax plus Social Care Precept
-  11% or more increase from Council Tax plus Social Care Precept

ES4.6 Free text comments on the budget proposals

1,158 (45%) of the 2,547 survey and 12 email respondents provided free text comments which explained their preference for the level of Council Tax and Social Care Precept, their views on the savings / income generation proposals, suggestions for other ways the council could save money or generate more income, and some comments about the consultation. The 1,158 free text and email responses have been categorised into themes (Figure ES5).

Figure ES5: Overview of survey free text and email comments about the budget



- 738 (64% of 1,158 respondents) explained their preference for the level of Council Tax or made other comments about Council Tax. A breakdown is provided in section 4.7.2
- 295 (25%) explained their preference for the level of Social Care Precept, or made other comments about Social Care Precept (section 4.7.3)
- 2 respondents (0.2%) provided comments on the savings proposals to reduce the budget gap (section 5.2)
- 380 (33%) suggested other ways the council could save money (section 5.3)
- 142 (12%) suggested other ways the council could increase income (section 5.4)
- 70 (6%) identified services they think are priorities to continue to fund (section 5.5)
- 19 (2%) provided other comments or suggestions (section 5.6)
- 24 (2%) provided comments about the consultation process (section 5.7).

The total number of comments exceeds 1,158 because some respondents addressed several themes.

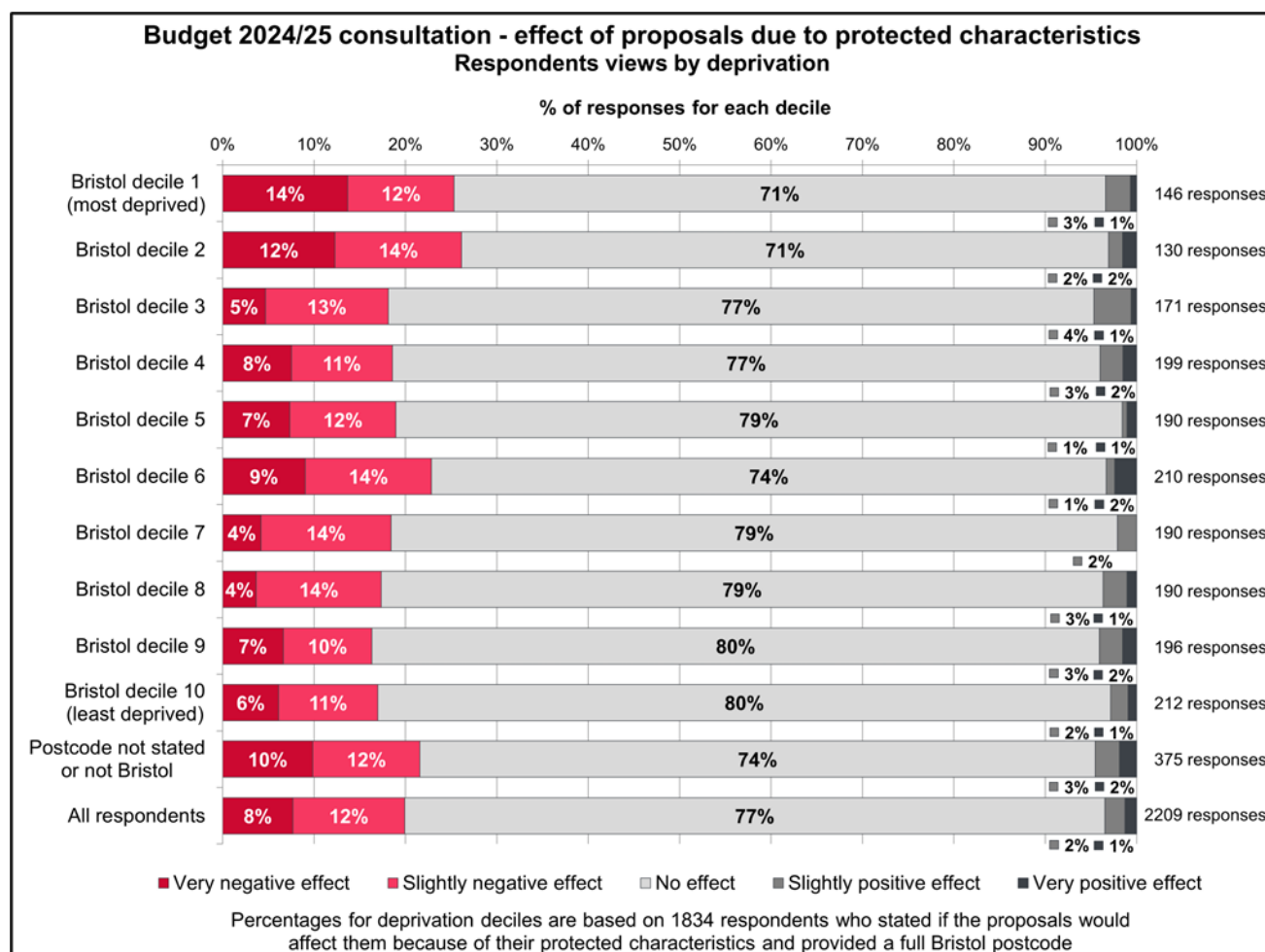
ES4.7 Impact of the proposals because of protected characteristics

Respondents were asked what effect, if any, the proposals would have on them because of their protected characteristics⁸. Of the 2,209 (87%) respondents who answered the question:

- 170 (8%) said the proposals would have a very negative effect
- 270 (12%) said the proposals would have a slightly negative effect
- 1,692 (77%) said the proposals would have no effect
- 49 (2%) said the proposals would have a slightly positive effect
- 28 (1%) said the proposals would have a very positive effect.

The proportion of respondents who think the proposals would have a very negative or slightly negative effect because of their protected characteristics is higher in the most deprived 20% of the city (26% in each of deciles 1 and 2) than other areas (Figure ES6). For other deciles, the proportion who say the proposals would have a slightly negative or very negative effect ranges from 16% in decile 9 to 23% in decile 6.

Figure ES6: Effect by deprivation of the proposals because of protected characteristics



217 respondents explained their reasons why the proposals would have an impact on themselves or others. This is summarised in section 6.2.

⁸ The protected characteristics defined in the Equality Act 2010 are age; disability; race including colour; nationality, ethnic or national origin; religion or belief; sex; gender reassignment; sexual orientation; being married or in a civil partnership; being pregnant or on maternity leave.

1 Introduction

1.1 The council's budget

Bristol City Council is spending around £1.051 billion this year (2023/24) providing a range of services to the people of Bristol. The money the council has available to spend on delivering day-to-day services to citizens is called the revenue budget⁹.

In 2023/24, 40% of this budget is raised locally through Council Tax (£263 million; 25%) and Business Rates (£154 million; 15%). The remaining 60% (£634 million) of funding comes from grants (such as schools funding) from the government (£451 million; 43%), income from fees and charges we make for some of the services we provide (£137 million; 13%), contributions from other organisations (£41 million; 4%), and income from investment (£5 million; less than 1%).

Every year, the council must agree an annual budget which balances the money we spend with the money we expect to receive. On 20 February 2024, Full Council will set the council's budget for the 2024/25 financial year. The budget sets out how much money the council will be able to spend on each service area and what the priorities are. As part of the budget, Full Council will decide on the level of Council Tax and Social Care Precept¹⁰ for 2024/25.

This year, these decisions will be again made in the context of acute financial pressures due to rising costs, continuing constraints on government funding, and increasing demand for the services the council provides.

1.2 Funding pressures and uncertainty

Councils are facing unprecedented financial pressures because of ongoing high inflation, interest rates at a 15-year high, pay pressures, and a global energy crisis, affecting the cost of our supply chain of goods, energy and services. At the same time, there have been many years of reductions or changes in local government funding. And in Bristol, demand for services, and the cost of providing them, have continued to rise as the city's population has grown, and the complexity of care and support packages we provide has increased.

Based on our current forecasts, we face a funding gap over the next five years (from 2024/25 to 2028/29) of between £4.7 million and £81.2 million, with a realistic assumption of £32 million¹¹. This is in addition to the £13.6 million of savings and efficiencies proposals for 2023-2028 outlined in the 2023/24 budget.

⁹ The £1.051 billion is general fund revenue and excludes capital and ringfenced funds.

¹⁰ Social Care Precept is a levy on top of core Council Tax, which is dedicated to help pay for adult social care.

¹¹ The wide range in these forecasts is due to national economic uncertainties (such as inflation and interest rates), the council's ability to manage demand and risks, and unknown levels of government funding in the future.

The council is able to increase core Council Tax by up to 3%¹² to help fund general services in 2024/25, without a local referendum. This would raise an additional £8.2 million. A Social Care Precept of up to 2% can be added to support the delivery of adult social care. This would raise £5.5 million and is in addition to the permitted increase of up to 3% in core Council Tax for general services. These limits are set by government¹³. There was not enough time to hold a local referendum on increases above these limits before Full Council decides on its 2024/25 budget in February 2024.

If we increase Council Tax by 3% and levy a Social Care Precept of 2% next year, we estimate there would remain a substantial funding gap in the council's core budget in 2024/25. If we do not increase Council Tax or levy a Social Care Precept, the funding gap would be even greater; by up to £13.7 million more. With such a significant challenge the budget cannot be balanced without additional funding, making greater efficiencies (doing the same for less money) and, in some cases, stopping doing some things entirely.

1.3 Budget 2024/25 consultation

The Budget 2024/25 consultation took place between 9 November and 21 December 2023. It sought views from the public (including businesses and organisations which represent non-domestic rate payers¹⁴) on the following:

- Options for the level of core Council Tax they would prefer in 2024/25 to support the delivery of general council services
- Options for the level of Social Care Precept they would prefer in 2024/25 to support the delivery of adult social care, in addition to the core Council Tax for general services
- Other ideas or suggestions for how the council might bridge the budget gap.

In addition to options for increasing Council Tax and Social Care Precept, the consultation described [25 other proposals for how we can reduce costs and increase our income](#) to help balance the budget. We also described [11 'invest to save' ideas](#) (early ideas for how we might use capital investment to reduce costs for the council in the long term). We do not think these other budget proposals are likely to mean major changes to services the council provides, so we did not include specific questions about them. However, people could provide feedback on any of these proposals as part of their free text comments in question 5 of the survey. If specific proposals are brought forward, public consultation and assessment will be undertaken if needed.

¹² Where we refer to a 3% increase in Council Tax, we are using 3% as shorthand for an increase of 2.99%.

¹³ The limits of a 3% increase in Council Tax and 2% for Social Care Precept were announced in the [Provisional local government finance settlement: England, 2024 to 2025](#) on 18 December 2023.

¹⁴ The council has a statutory duty to consult each year with representatives of non-domestic rate payers about the authority's proposals for expenditure in the forthcoming year. The activities undertaken to consult representatives of non-domestic rate payers are described in section 2.2.4

1.4 Scope of this report

This consultation report describes the consultation methodology and the feedback received, which will be considered by Cabinet on 23 January 2024 before decisions on the 2024/25 budget are made by Full Council on 20 February 2024.

- **Chapter 2** of this report describes the consultation methodology. The consultation information and questions are summarised in section 2.1.1. The print versions of the [consultation information guide](#) and [survey booklet](#) can be viewed online.
- **Chapter 3** presents the consultation survey response rate and respondent characteristics
- **Chapter 4** describes feedback on the level of Council Tax and Social Care Precept
- **Chapter 5** summarises respondents' suggestions on other ways to reduce costs and generate more income, which would help to bridge the forecast budget gap over the next five years.
- **Chapter 6** sets out the effects that respondents said the proposals would have on them because of their protected characteristics.
- **Chapter 7** describes how this report will be used and how to keep updated on the decision-making process.

This report includes analysis of the responses to the multiple-choice questions and the 'About You' survey questions for all 2,547 respondents to the survey.

1,146 of the respondents also provided free text comments and suggestions as part of their survey responses (survey question 5). These have been analysed together with the 12 email responses to the consultation (1,158 free text survey and email responses, in total).

2 Methodology

2.1 Survey

2.1.1 Online survey

The [Budget 2024/25 consultation survey](#) was available on the council's Consultation and Engagement Hub (www.ask.bristol.gov.uk) between 9 November and 21 December 2023. An [Easy Read version](#) and a [British Sign Language version](#) were also available on the Consultation and Engagement Hub.

Survey information

The survey contained the following information as context for the survey questions.

- Details of the council's revenue budget (the money available to spend on delivering day-to-day services). This included an overview of where the money comes from, a breakdown of how Council Tax revenue is spent (based on 2023/24 expenditure) and details of three other budgets (the Dedicated Schools Grant, the Public Health Budget, and the Housing Revenue Account), which the council must keep separate from its main day-to-day spending
- Details of the forecast budget shortfall as estimated at the time of publication (in November 2023) of between £4.7 million and £81.2 million¹⁵ over the next five years to March 2029, due to increasing costs, continuing constraints on UK Government funding, and increasing demand for services the council provides
- Details of the assistance the council is providing to low-income households in meeting their Council Tax bills
- An outline of the council's capital investment programme in 2023/24
- An explanation of council reserves
- Forecasts of how much additional revenue would be raised in 2024/25 by each of the proposed core Council Tax options (increases of 0%, 1%, 2% or 3%) and each of the options for the level of Social Care Precept (0%, 1% or 2%)
- The weekly and annual cost increases that would be payable by households in each Council Tax band for each Council Tax option and Social Care Precept option
- A description of [25 other proposals for how we can reduce costs and increase our income](#) to help balance the budget.
- Information about [11 early ideas for how we might use capital investment to reduce costs for the council in the long term](#), which would help to bridge the budget gap.

¹⁵ The latest estimate of the forecast budget gap on 15 January 2024 remains between £4.7 million and £81.2 million.

Survey questions

The survey questions sought respondents' views on the following:

- The level of core Council Tax they would prefer in 2024/25. Options were no increase, a 1% increase, a 2% increase or a 3% increase, each of which would have different implications for how much money the council could spend on general services
- The level of Social Care Precept they would prefer in 2024/25 in addition to the increase in core Council Tax. Options were no Social Care Precept, a 1% Social Care Precept, or a 2% Social Care Precept
- Whether respondents would be prepared to pay an increase of more than 3% in core Council Tax or more than 2% Social Care Precept, if the government announced this is permitted in 2024/25 ¹⁶. Options for Council Tax were no increase greater than 3%, a 4% increase, a 5% increase, or an increase of 6% or more. Options for Social Care Precept were no more than 2%, a 3% precept, a 4% precept, or a precept of 5% or more. The [Provisional local government finance settlement: England, 2024 to 2025](#) published on 18 December 2023 set out that these larger increases would not be permitted in 2024/25
- Respondents' reasons for the level of Council Tax and Social Care Precept they would prefer, and any other suggestions they have for how the council could save money or generate income. Respondents could also comment on the 25 other budget proposals and 11 ideas to invest capital to save in the long term.

The 'About you' section requested information which helps the council to check if the responses are representative of people across the city who may have different needs.

- Respondents' postcode – this identifies if any parts of the city are under-represented in responding to the consultation and it can show if people from more deprived areas of the city have different views compared to people living in less deprived areas
- Equalities monitoring information – this enables the council to check if people with specific protected characteristics under the Equality Act 2010 are under-represented in the responses
- Other information about respondents; for example, whether they are a councillor, a council employee, or represent a local business
- How respondents found out about the consultation – to help the council publicise future consultations effectively.

Respondents could choose to answer some or all questions in any order and save and return to the survey later.

¹⁶ In the Local government finance policy statement 2024 to 2025 published on 5 December 2023, the government announced that core Council Tax can be increased by up to 3% in 2024/25 and the maximum level of Social Care Precept would be 2%. This was after the start of the council's budget consultation. The consultation options of more than 3% for core Council Tax and more than 2% for Social Care Precept would not be permitted.

2.1.2 Alternative formats

An [Easy Read version](#) of the consultation was available on the Consultation and Engagement Hub and could be completed online or printed and returned by post.

A [British Sign Language version](#) was also available on the Consultation and Engagement Hub.

Paper copies (a [consultation information guide](#) and a separate [survey booklet](#)) were distributed with Freepost return envelopes to all libraries in Bristol and were available on request.

Other formats (braille, large print, other alternative formats, and translation to other languages) were available on request.

2.1.3 Other correspondence

12 emails were received in response to the consultation. All 12 emails were received from citizens. The emails provided comments on the level of Council Tax, ideas for other ways to raise income and reduce costs, views on which services are important to continue funding, and feedback about the consultation process.

The email text has been analysed with the free text responses to question 5 of the survey and is reported with the survey free text feedback in chapter 5.

2.2 Publicity and briefings

2.2.1 Objective

The following programme of activity was carried out to publicise and explain the Budget 2024/25 consultation. The primary objective was to engage residents, communities, stakeholders, businesses and representatives of non-domestic ratepayers across the city in decisions on the level of Council Tax and Social Care Precept, and other ways the council might bridge the forecast budget gap.

To achieve this, information was shared across a wide range of channels, reaching as broad a range of audiences as possible, to maximise response rates. Areas of the city that were found to have responded in lower numbers were targeted part way through the consultation.

2.2.2 Bristol City Council channels

Online and paper versions of the consultation document were shared via the following council and partner channels and networks:

- BCC weekly business e-newsletter 5 December 2023- 2,700 recipients
- We Are Bristol weekly newsletter 6 December 2023 – 2,000 recipients
- Ask Bristol e-bulletin – delivered to 7,292 recipients on 23 November 2023, and delivered to 7,285 recipients on 13 December 2023
- Public Health citizen e-newsletter ICS December issue

- Emails to 134,997 users of the online Council Tax account system were sent on 17 November 2023 inviting citizens to take part in the survey. Follow-up emails were sent on 7 December and 19 December 2023
- Headteachers' newsletter bulletin 4 December 2023
- Direct email to over 300 community-based organisations and organisers
- Paper copies in libraries

2.2.3 Internal communications

Messages announcing the launch of the public consultation were sent to the following internal stakeholders:

- Cabinet
- Directors, managers, managers of offline staff
- Party group leaders
- Elected councillors who were provided with a digital engagement pack, which included assets for social media and newsletter content, to share with their contacts.
- Chairs of scrutiny committees
- Chair of HR committee
- Trade unions
- Staff-led groups, and all staff
- Youth Council and Youth Mayors
- Mayoral Commissions (Women's, Race, Disability, History)
- Wholly owned companies (Bristol Holding Company, Bristol Waste, Goram Homes).
- Staff and elected members were asked to promote the public consultation.

There were reminders throughout November and December through our blogs and bulletins.

2.2.4 Bristol City Council partners, businesses and voluntary sector organisations

The council has a statutory duty to consult each year with representatives of non-domestic rate payers about the authority's proposals for expenditure in the coming year.

Details of the consultation were shared at the launch, and with one week to go, with representatives of business organisations (including Business West, local Business Improvement Districts, and the Federation of Small Businesses), the LGA, voluntary sector organisations, public sector/city stakeholders, local health partners, equalities groups and community groups, with a request for information to be circulated through their networks.

77 survey responses were received from people who represent or own a local business, and, in addition, there were 11 survey responses from health and social care providers, school or education providers, and public transport providers. 14 survey responses were received from voluntary/community/social enterprise organisations / interest groups. Details are reported in section 3.4.

2.2.5 Media engagement

A news article was published to the BCC Newsroom on 9 November 2023. The External Communications team supported reporting of the budget leading to six items of news coverage and other references to the consultation across broadcast media during the six-week period.

2.2.6 Social Media – posts, outreach and advertising

Regular posts on Bristol City Council's social media channels (Twitter, Facebook, Next Door, LinkedIn and Instagram) were made for the duration of the consultation. These organic posts had a potential reach of 22,000 people resulting in 186 survey link clicks.

Paid for Facebook advertising (approximately £200) was also employed one week before the consultation closed to engage targeted areas of the city where response was low. This had a reach of 24,000 with 746 link clicks.

3 Survey response rate and respondent characteristics

3.1 Response rate to the survey

The Budget 2024/25 consultation survey received 2,547 responses, of which 2,364 (92%) were responses to the main online survey, 168 (7%) were responses via the Easy Read survey, and 15 (1%) were paper surveys. In addition, 12 email responses were received.

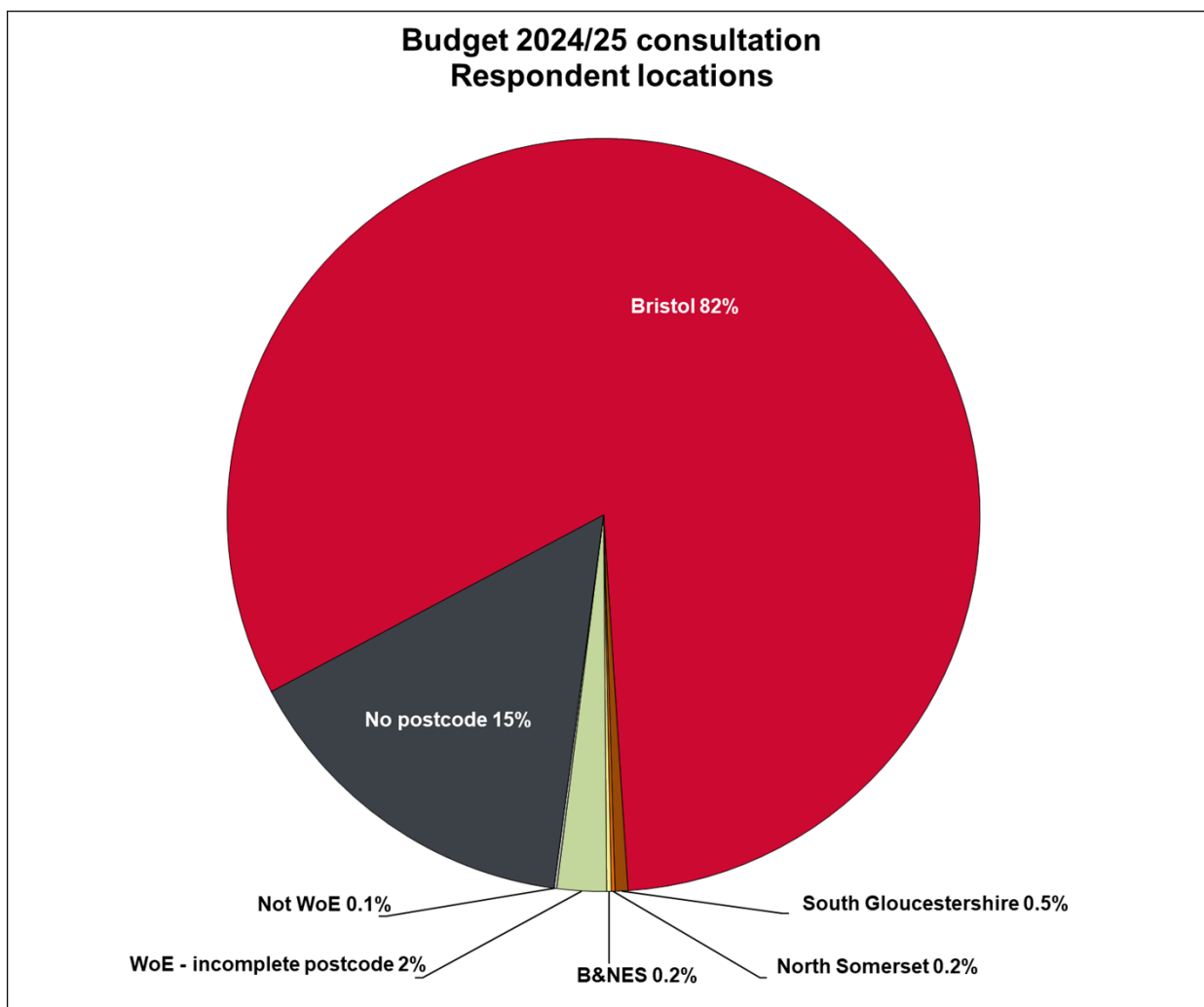
The response rate and respondent details in sections 3.2 to 3.4 below are for respondents to the survey. Details of the email respondents are summarised in section 3.5.

3.2 Geographic distribution of survey responses

2,082 responses (82%) were received from postcodes within the Bristol City Council area, 14 (0.5%) responses were from South Gloucestershire, five (0.2%) were from Bath & North East Somerset (B&NES), and four (0.2%) were from North Somerset. A further 54 (2%) were from unspecified locations within the four West of England authorities¹⁷ (Figure 1).

385 (15%) did not provide a postcode.

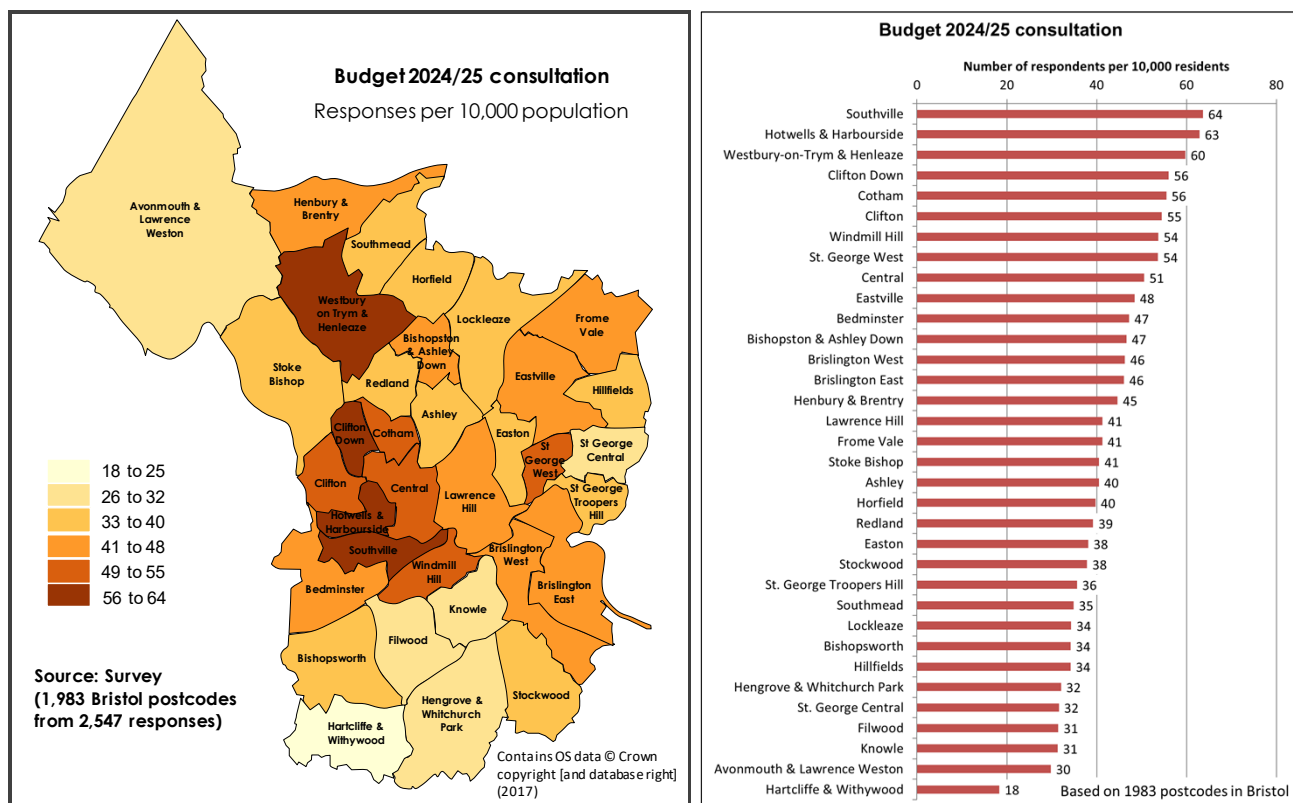
Figure 1: Geographic distribution of responses



¹⁷ Incomplete postcodes identified the home location as within the WOE authorities area (Bristol, B&NES, North Somerset and South Gloucestershire), but not which authority.

Of the 2,082 responses from within the Bristol City Council area, 1,983 provided full or partial postcodes from which the ward of origin could be identified¹⁸ (Figure 2).

Figure 2: Geographic distribution of responses in Bristol



3.3 Response rate from areas of high and low deprivation

The home location of respondents in Bristol was compared with nationally published information on levels of deprivation across the city¹⁹ to review if the responses received include a cross-section of people living in more deprived and less deprived areas. This helps the council to know if the views of citizens in more deprived areas differ from people living in less deprived areas.

The comparison looked at levels of deprivation in 10 bands (known as ‘deciles’) from decile 1 (most deprived) to decile 10 (least deprived). Figure 3 compares the percentage of Bristol respondents²⁰ living in each of the deprivation deciles (red bars) to the percentage of all Bristol citizens who live in each decile (grey bars).

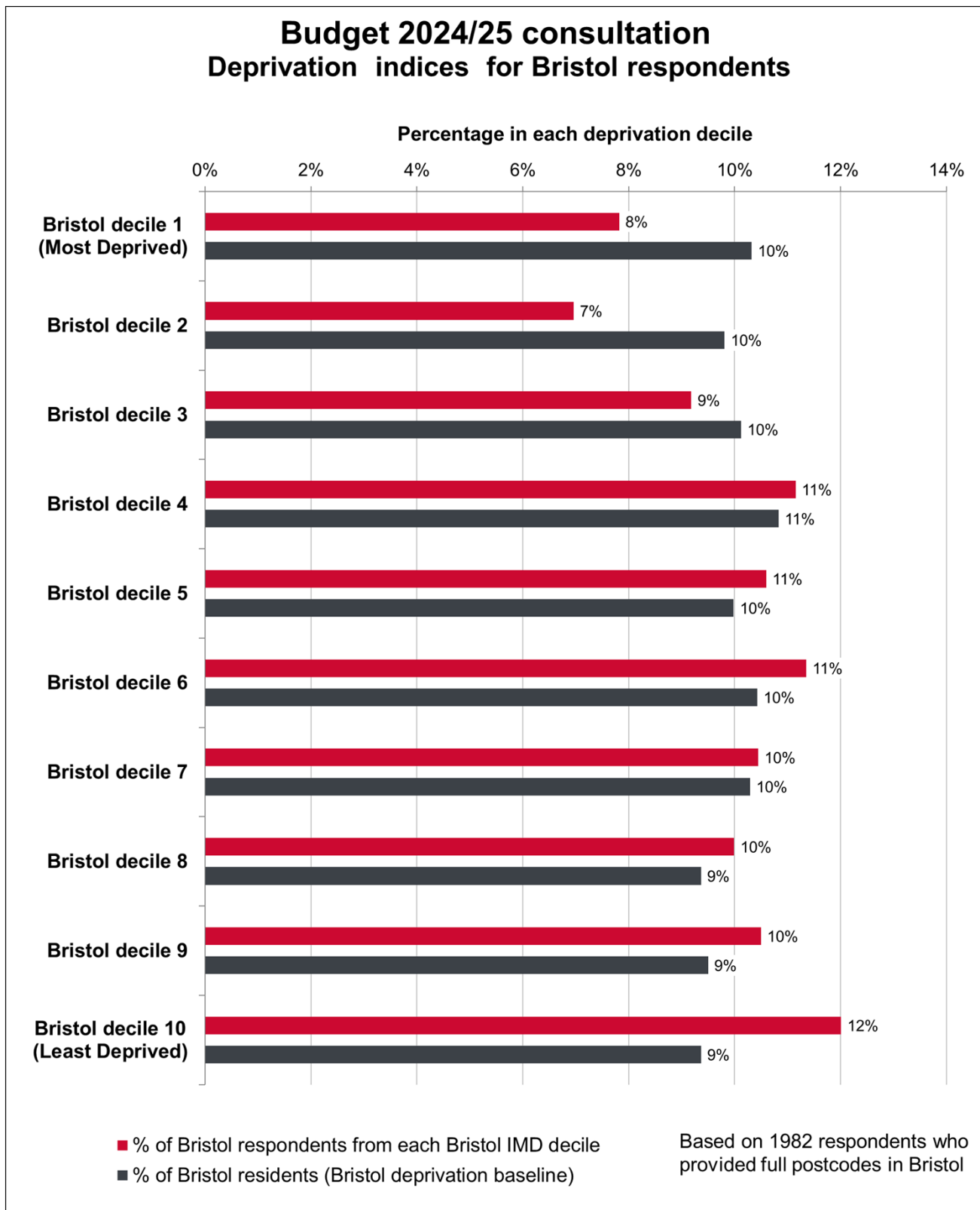
¹⁸ The other 99 responses included incomplete postcodes which are within Bristol but do not include enough information to identify a specific ward.

¹⁹ The Office for National Statistics (ONS) publishes information about deprivation for small areas throughout England - known as ‘Lower Super Output Areas’ (LSOAs). For each LSOA, a measure of deprivation is published called ‘Indices of Multiple Deprivation’ (IMD), which takes account of 37 indicators that cover income, employment, education, health, crime, barriers to housing and services, and living environment. The latest IMD data are from 2019 and define IMD for each of the 32,844 LSOAs in England used in the 2011 Census, of which 263 LSOAs are in the Bristol City Council area. Postcodes provided by respondents can each be matched to one of the 263 LSOAs in Bristol and thus to one of the deprivation deciles. Note: postcodes provide approximate locations; they are not used to identify individuals or specific addresses.

²⁰ Based on 1,982 respondents who provided full postcodes in the Bristol administrative area from which deprivation decile can be identified.

Figure 3 shows there was under-representation of responses from the most deprived 30% of the city (deciles 1, 2 and 3). Response rates from the least deprived 20% of the city (deciles 9 and 10) and also from decile 6 were over-represented. Responses from deciles 4, 5, 7 and 8 broadly match the proportion of Bristol citizens living in these deciles.

Figure 3: Comparison of response rate from areas of high and low deprivation



Percentages in Figure 3 are shown to the nearest whole number. The length of each bar reflects unrounded percentages; hence bars shown with the same percentage (e.g. decile 4) may be slightly different in length.

3.4 Characteristics of survey respondents

3.4.1 Overview

2,462 (97%) people answered one or more of the equalities monitoring questions.

Respondent characteristics are summarised below. The charts compare:

- characteristics for all respondents who answered the equalities questions (shown by bars with a red outline)
- characteristics of 'Bristol respondents' who answered equalities questions and provided a Bristol postcode (shown by solid red bars)
- characteristics of all Bristol's citizens based on the 2021 Census (shown by solid grey bars). Census 2021 data are available for seven protected characteristics (age, disability, ethnicity, religion/faith, sex, gender identity, and sexual orientation)

Note that many of the respondents who did not provide postcodes may also live in the Bristol City Council administrative area but are not included in figures for 'Bristol respondents'.

In summary, groups that were under-represented in the responses were:

- Children and young people aged 24 years and younger, and people aged 85 and older
- People of Asian or Asian British backgrounds; Black, Black British, Caribbean or African backgrounds; Mixed or multiple ethnic groups; and people of other ethnic background
- Christians, Muslims, Hindus and Sikhs
- Females
- Heterosexual citizens

The following groups responded in higher numbers than their proportion in the population:

- People aged 25 to 74 years
- Disabled people
- People of Other White Background
- People with no religion, Buddhists, Jews, and people with 'Other religion'
- Males
- Bi, gay/lesbian, and people who use another term to describe their sexual orientation

Chapter 6 describes the effects that respondents said the proposals would have on them because of their protected characteristics.

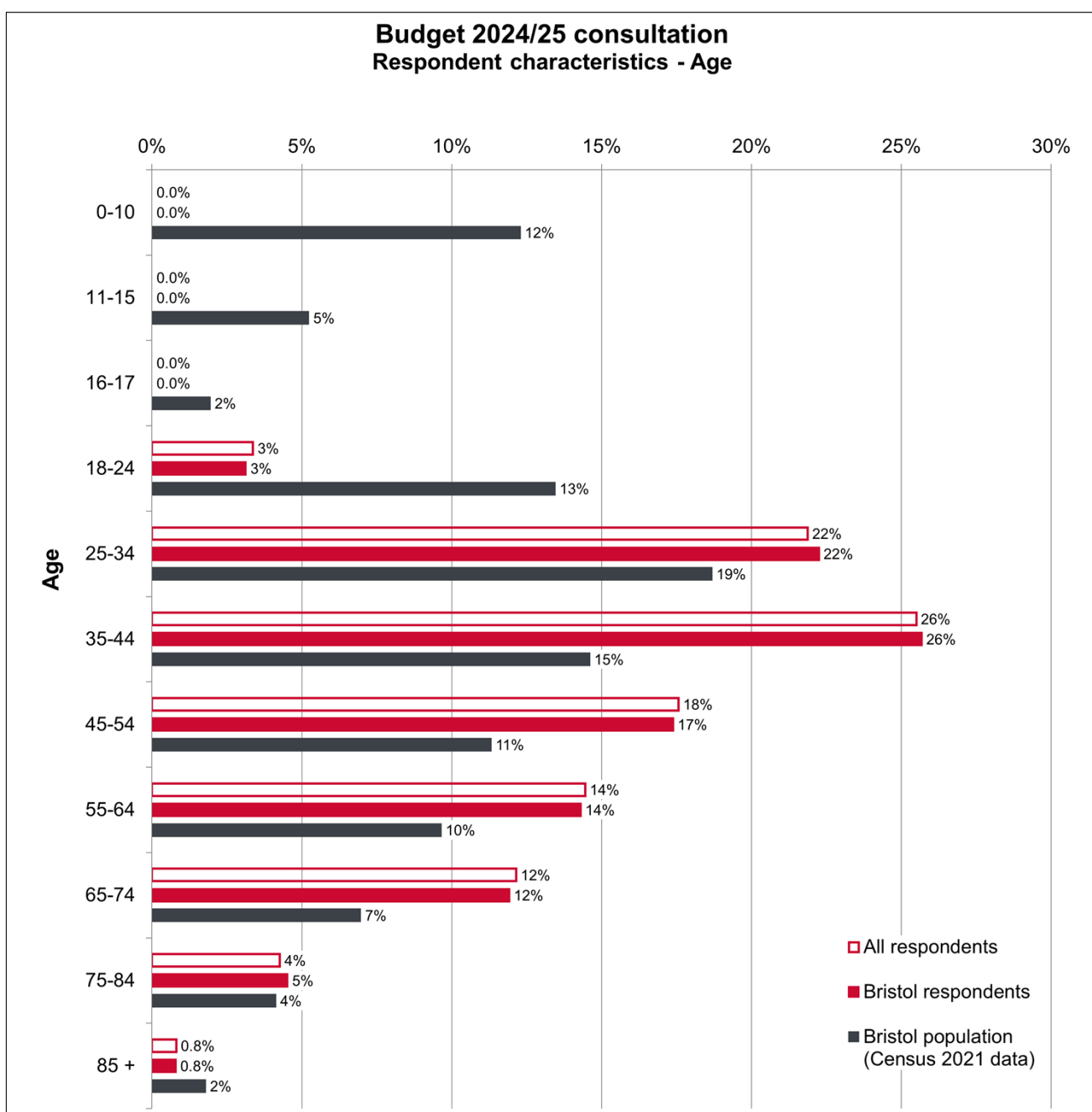
3.4.2 Age

The highest number of responses were from respondents aged 35-44 years (26%), followed by 25-34 (22%).

All age groups between 25 and 74 responded in higher proportions than these ages in the population. Response rates from people aged 75-84 years closely match the proportion of these age groups in Bristol's population. Survey responses from children (under 18), young people aged 18-24 and people aged 85 and older were under-represented. These percentages exclude the 4% of respondents (3% of Bristol respondents) who answered 'prefer not to say'.

In each age category, the proportions of 'all respondents' and 'Bristol respondents' were very similar.

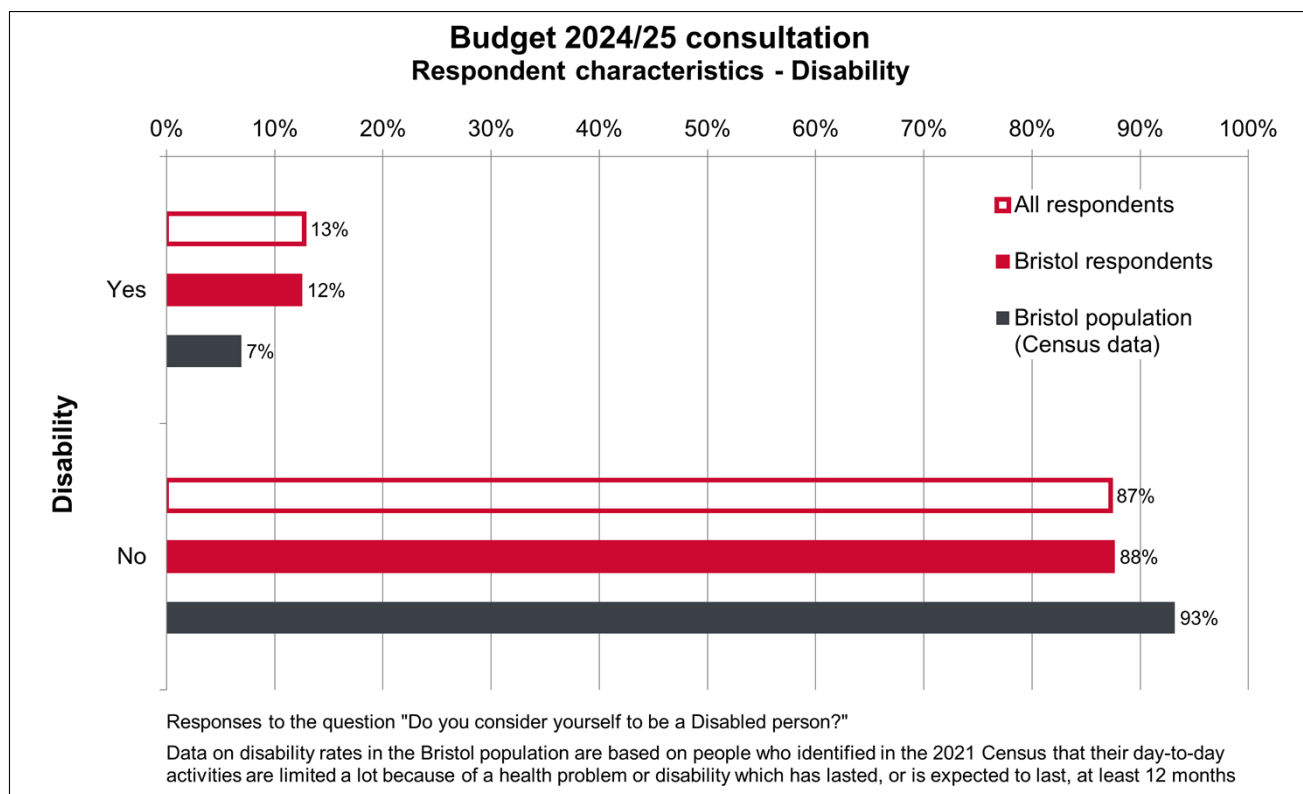
Figure 4: Age of respondents



3.4.3 Disability

The proportion of disabled respondents (13% of all respondents; 12% of Bristol respondents) is greater than the proportion of disabled people living in Bristol. These percentages exclude the 9% of respondents (7% of Bristol respondents) who answered ‘prefer not to say’)

Figure 5: Disability



3.4.4 Ethnicity

The response rate from Other White Background respondents (15%) is higher than the proportion of these citizens in the Bristol population.

The proportion of White British (73% of all respondents; 74% of Bristol respondents) and Gypsy, Roma or Traveller (0.2%) is similar to the proportion of these citizens in the Bristol population.

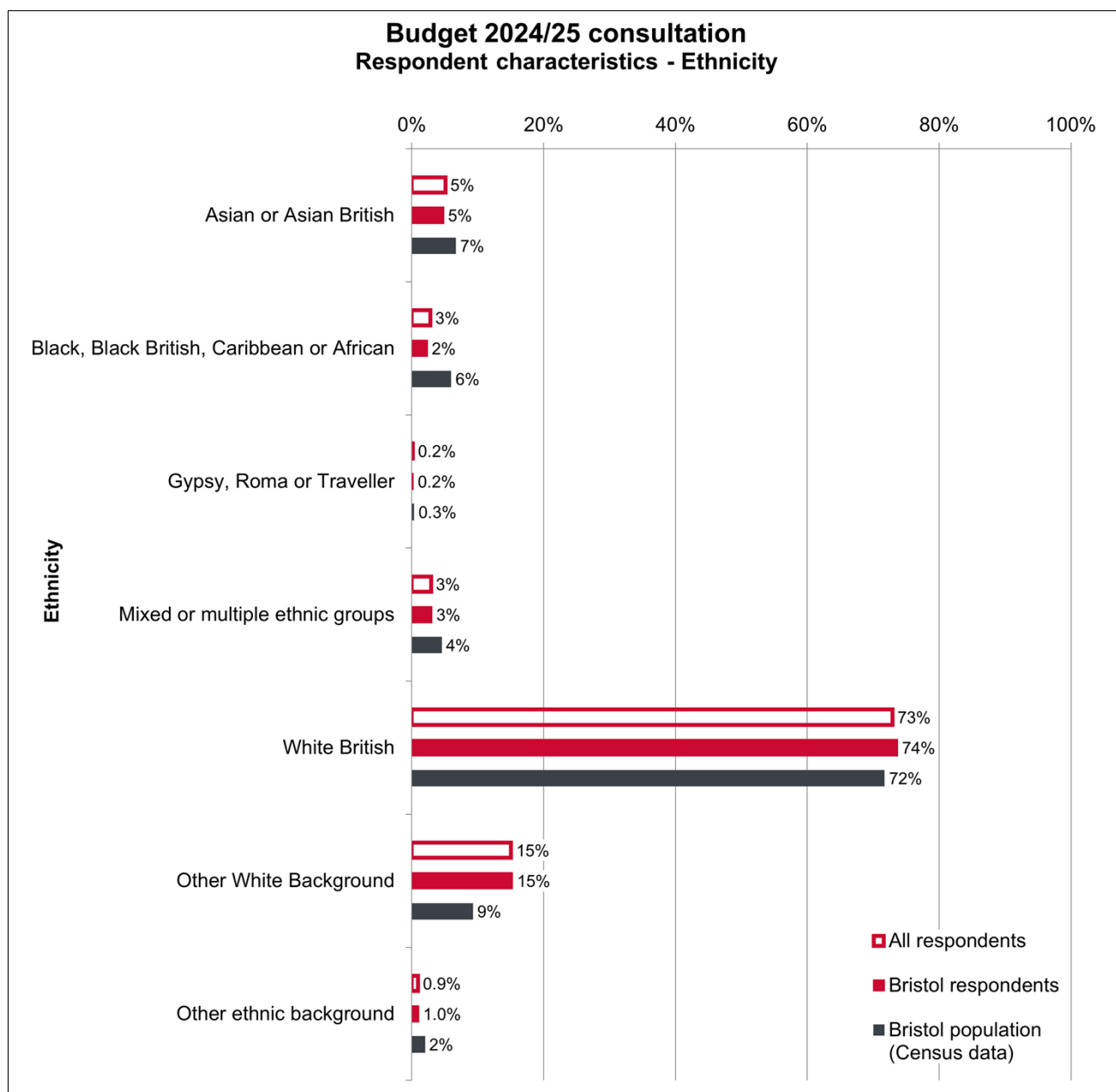
The following ethnic groups were under-represented in the response rates compared to the proportion of people in each of these ethnic groups living in Bristol:

- Asian or Asian British (5% of all respondents; 5% of Bristol respondents)
- Black, Black British, Caribbean or African (3% of all respondents; 2% of Bristol respondents)
- Mixed or multiple ethnic groups (3% of all respondents; 3% of Bristol respondents)
- Other ethnic background (0.9% of all respondents; 1% of Bristol respondents)

These percentages exclude the 12% of respondents (10% of Bristol respondents) who answered ‘prefer not to say’. Proportions of each ethnicity for all respondents are similar to

respondents who provided a Bristol postcode, with the exception of Black, Black British, Caribbean or African respondents.

Figure 6: Ethnicity of respondents



3.4.5 Religion/Faith

People with no religion (63% of all respondents; 64% of Bristol respondents) responded in higher proportion than people of no religion in Bristol’s population (55%).

Buddhists (0.7% of all respondents; 0.8% of Bristol respondents), Jews (0.4%) and people with ‘Other religion’ (1%) also responded in slightly greater numbers than the proportions of these faiths in Bristol.

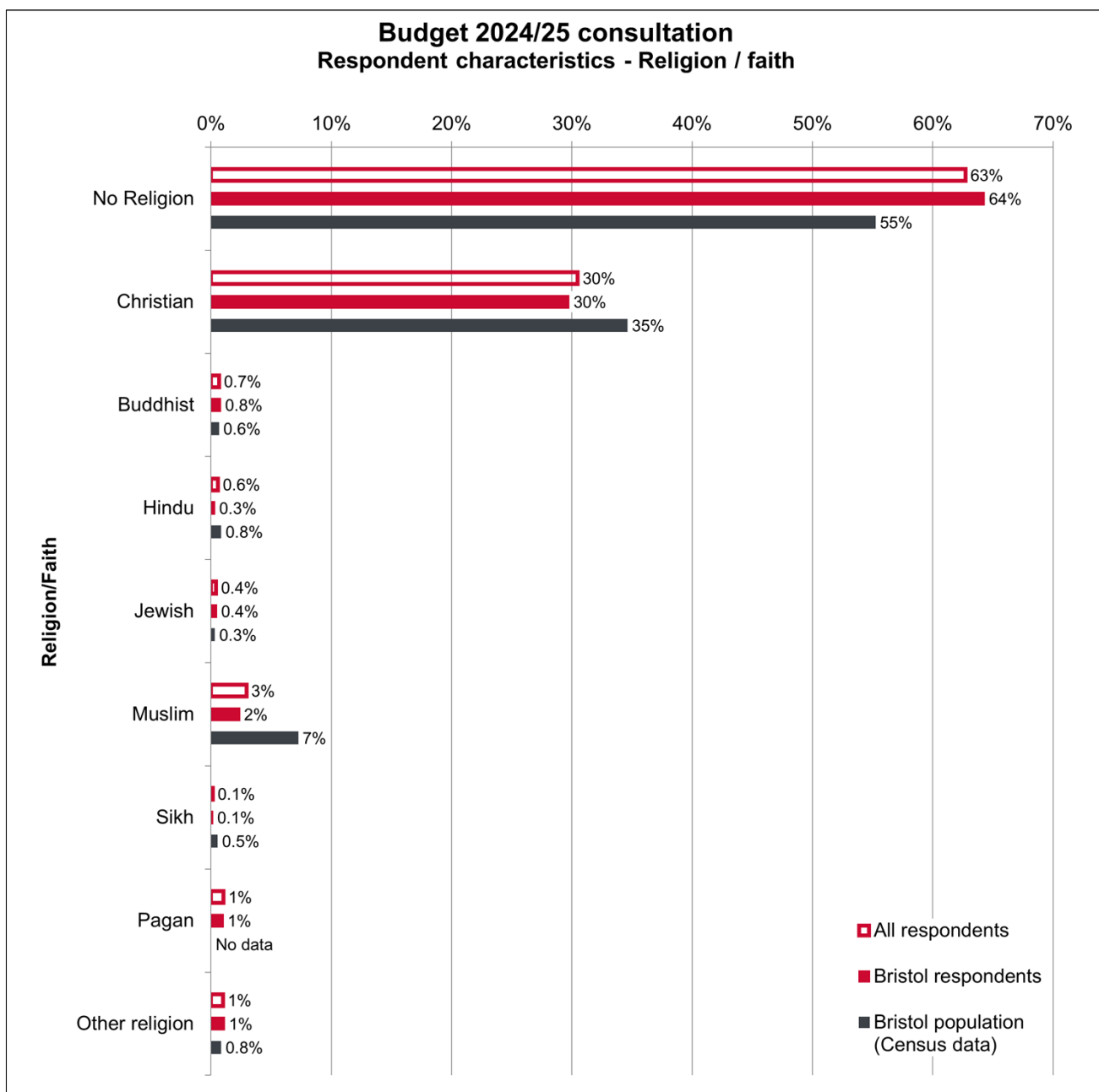
Christians (30%), Muslims (3% of all respondents; 2% of Bristol respondents), Hindus (0.6% of all respondents; 0.3% of Bristol respondents) and Sikhs (0.1%) were under-represented compared to the proportions of these faiths living in Bristol.

1% of respondents are Pagan. There are no data from the Census 2021 for the proportion of Pagans living in Bristol.

These percentages exclude the 14% of respondents (12% of Bristol respondents) who answered 'prefer not to say'.

The proportion of each religion/faith for all respondents closely matches Bristol respondents, with the exception of Hindu and Muslim respondents.

Figure 7: Religion/faith of respondents

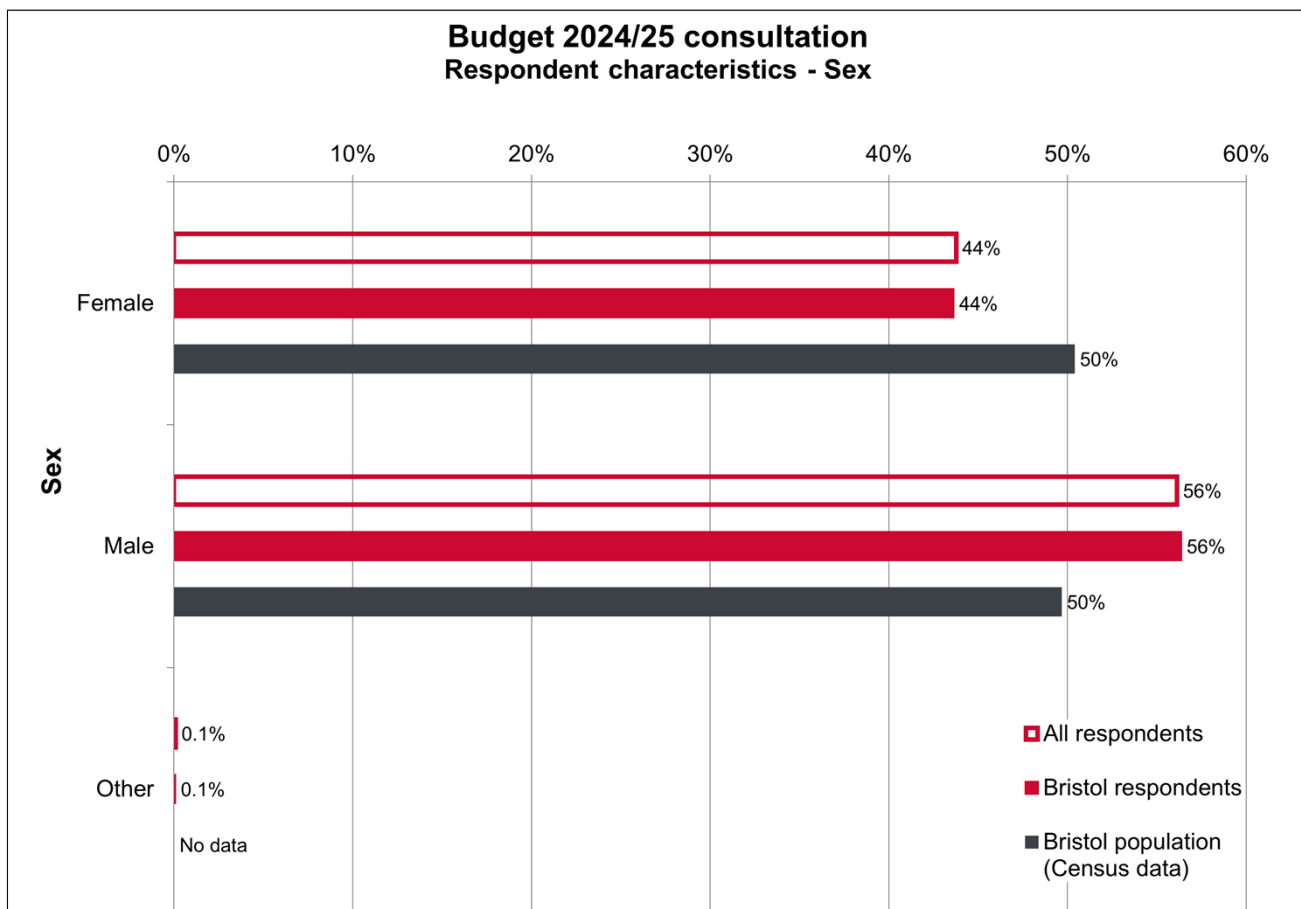


3.4.6 Sex

44% of all survey responses were from women and 56% were from men. This compares to 50% of each sex in the Bristol population. 0.1% of responses were from people who identified as ‘other sex’.

The proportion of male and female for all respondents closely matches Bristol respondents. These percentages exclude the 12% of respondents (10% of Bristol respondents) who answered ‘prefer not to say’.

Figure 8: Sex of respondents

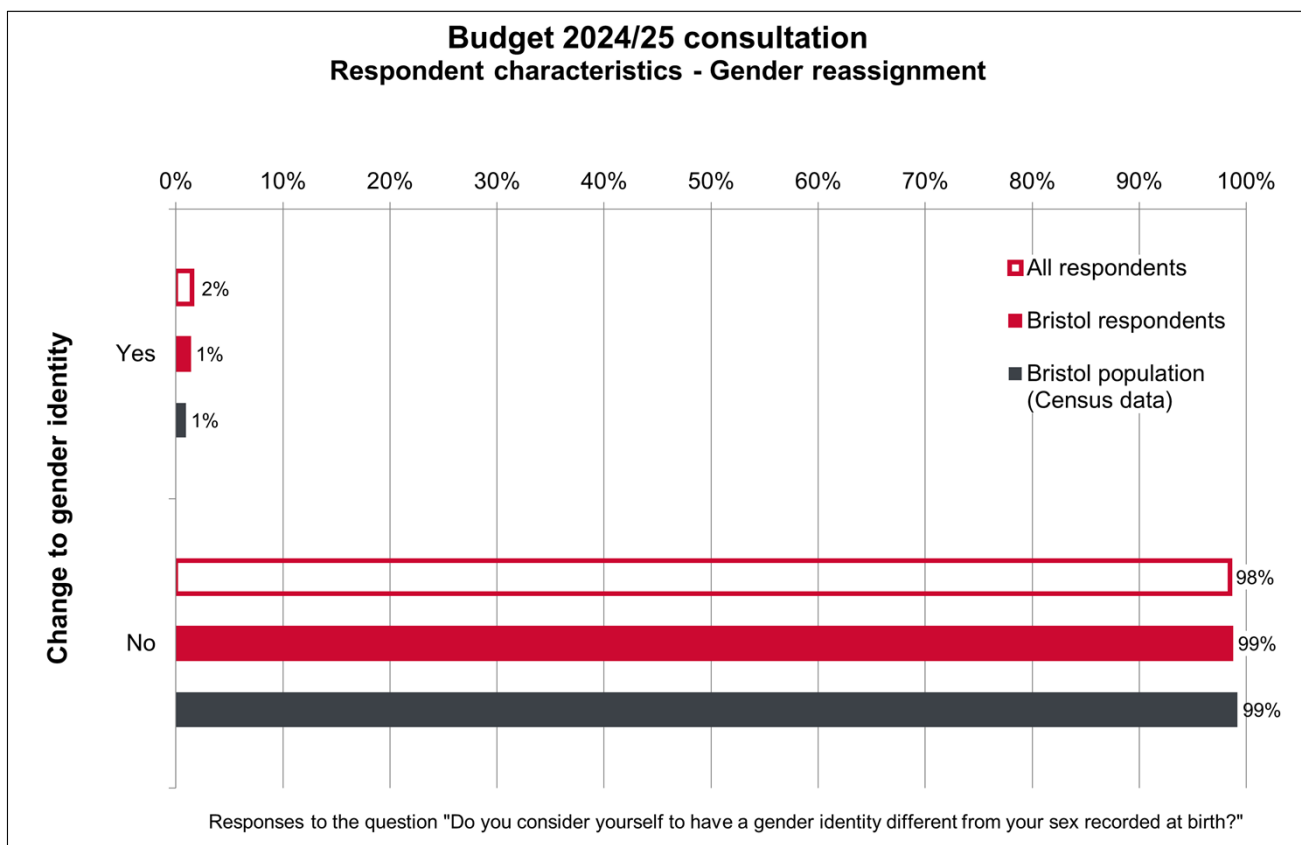


3.4.7 Gender reassignment

2% of respondents (1% of Bristol respondents) stated they have a gender identity different to their sex recorded at birth. This is similar to the 1% of the Bristol population who stated in the 2021 Census that their gender identity is different to their sex recorded at birth.

These percentages exclude the 10% of respondents (9% of Bristol respondents) who answered 'prefer not to say'.

Figure 9: Gender reassignment



3.4.8 Sexual orientation

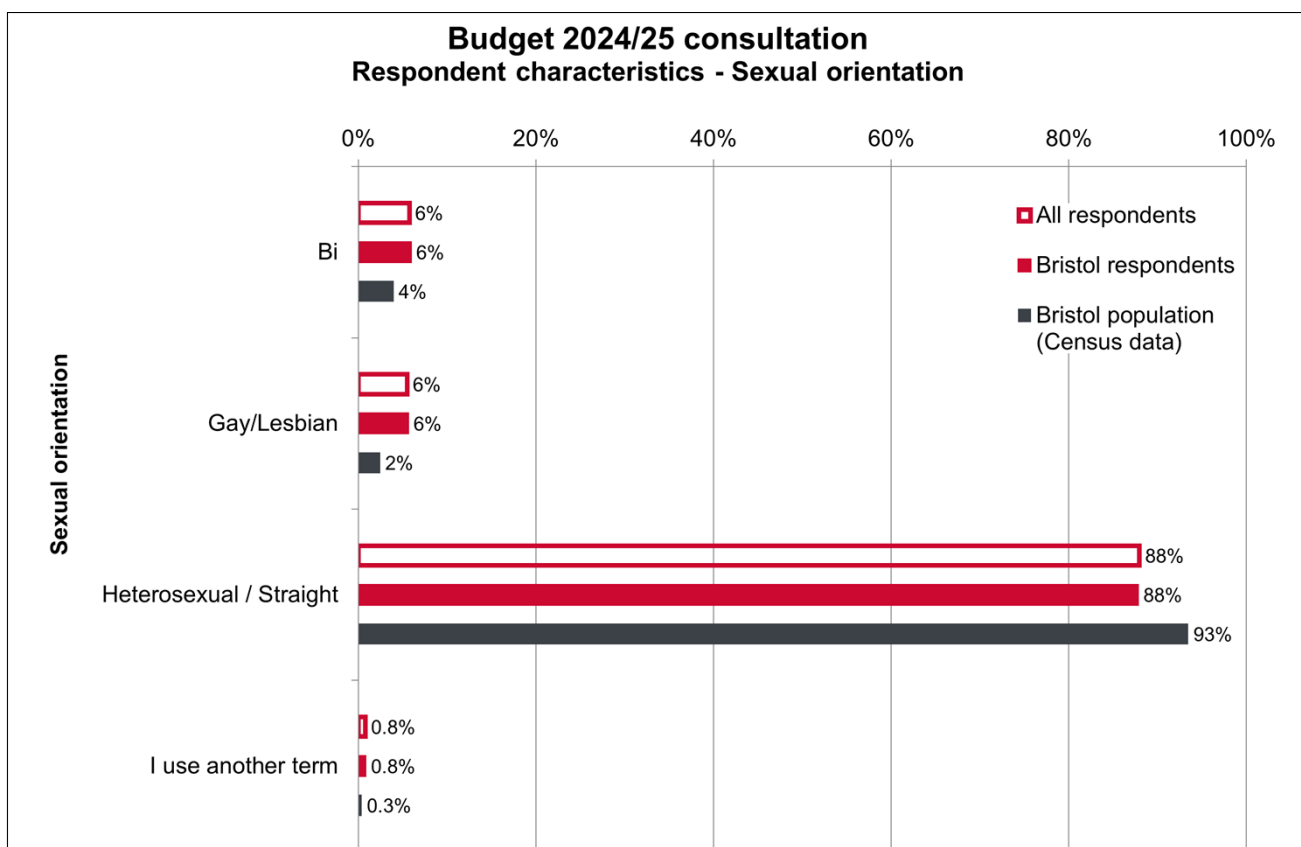
People who are bi (6%), gay/lesbian (6%), or who use another term for their sexual orientation (0.8%) responded in higher numbers than the proportions of these groups in Bristol's population. In the 2021 Census, the proportions of each group in Bristol was 4% bi, 2% gay/lesbian, and 0.3% use another term.

Heterosexual respondents (88%), were under-represented compared to the proportions of heterosexual people living in Bristol (93%).

The proportions of each group for all respondents match the proportions for Bristol respondents.

These percentages exclude the 21% of respondents (19% of Bristol respondents) who answered 'prefer not to say'.

Figure 10: Sexual orientation



3.4.9 Pregnancy and maternity, carer status and and refugee/asylum status

The survey also asked respondents about their pregnancy and recent maternity status, if they are a carer, and if they are a refugee or asylum seeker.

Census data are not available for the proportion of people with these characteristics living in Bristol. Figures 11, 12, and 13 show the proportions of all respondents and Bristol respondents for each of these characteristics. The proportion of each characteristic for all respondents closely matches the proportion for Bristol respondents.

Figure 11: Pregnancy and recent maternity

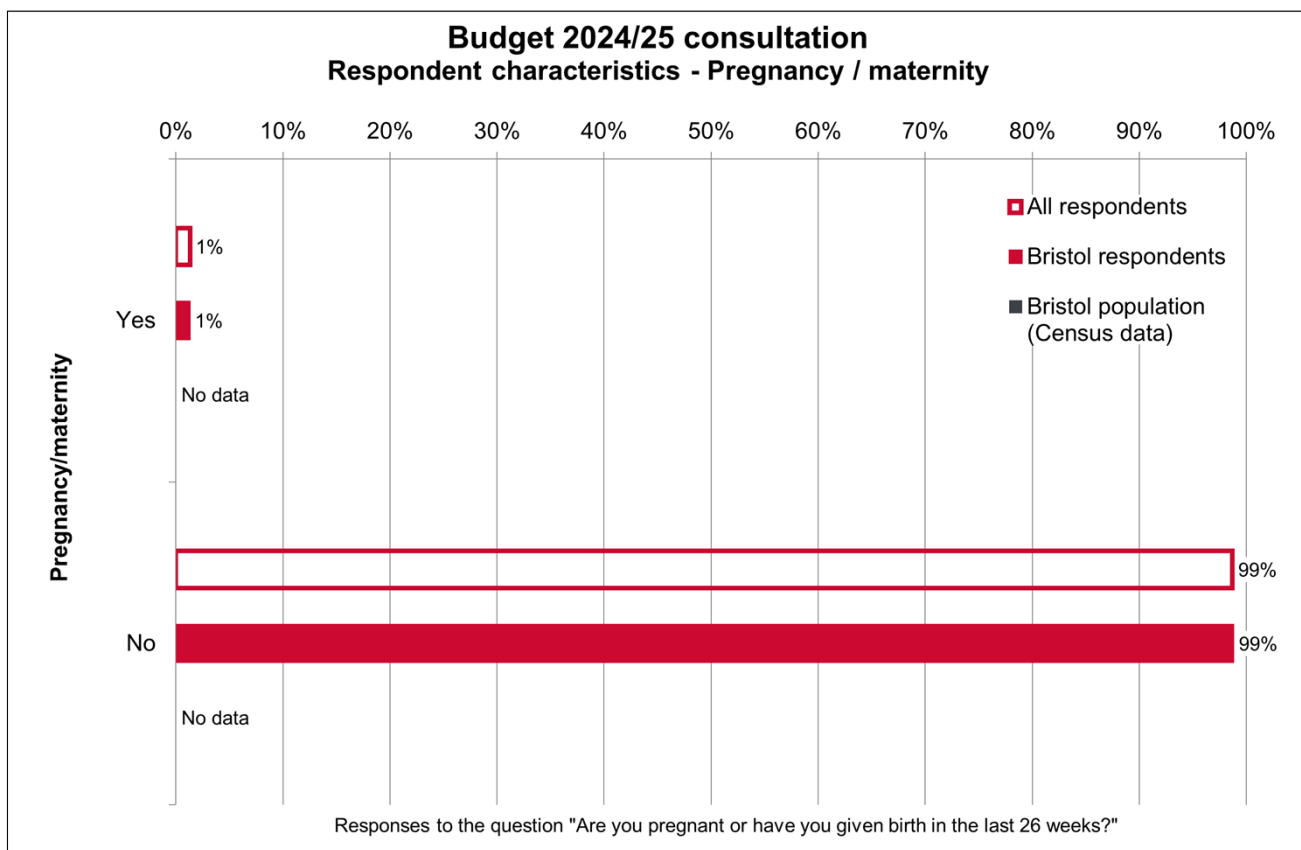


Figure 12: Carer status

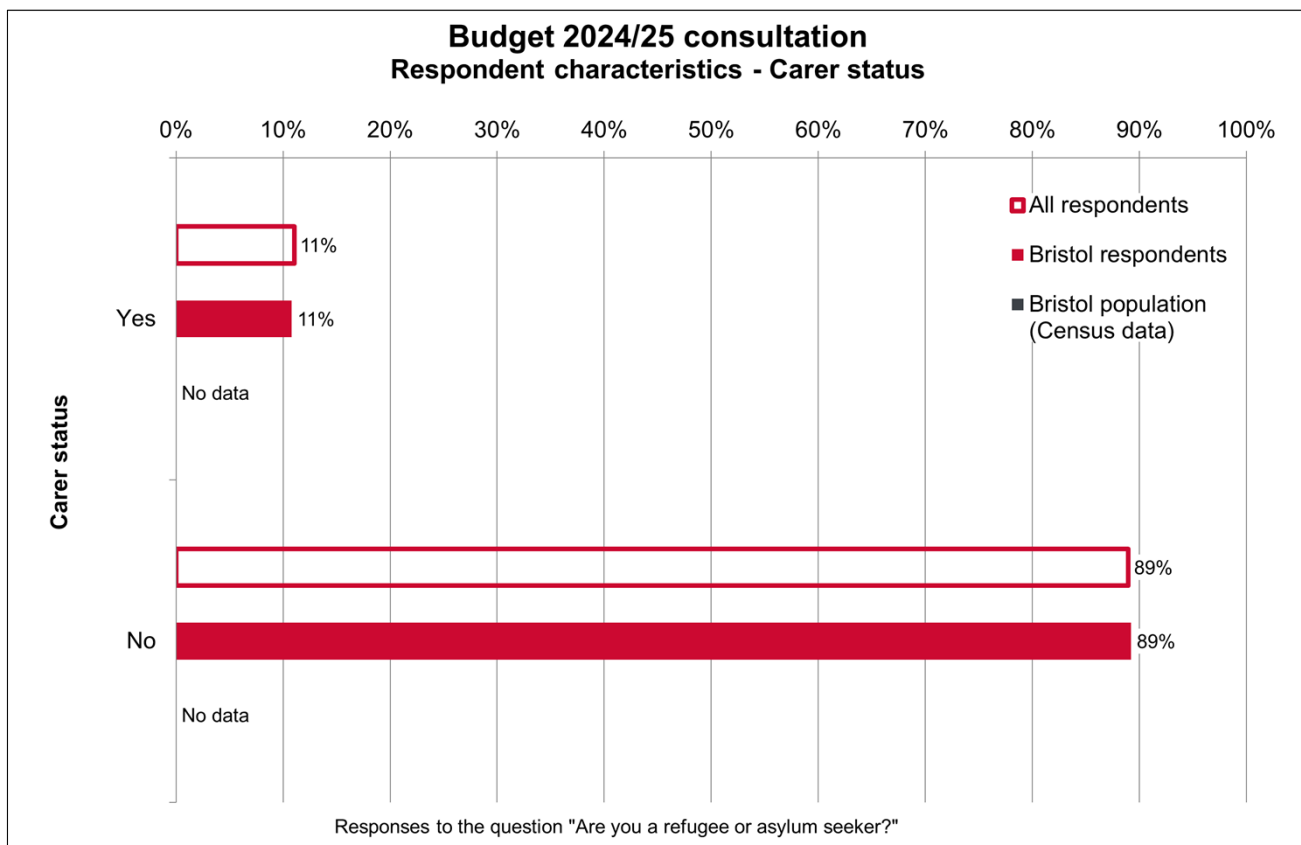
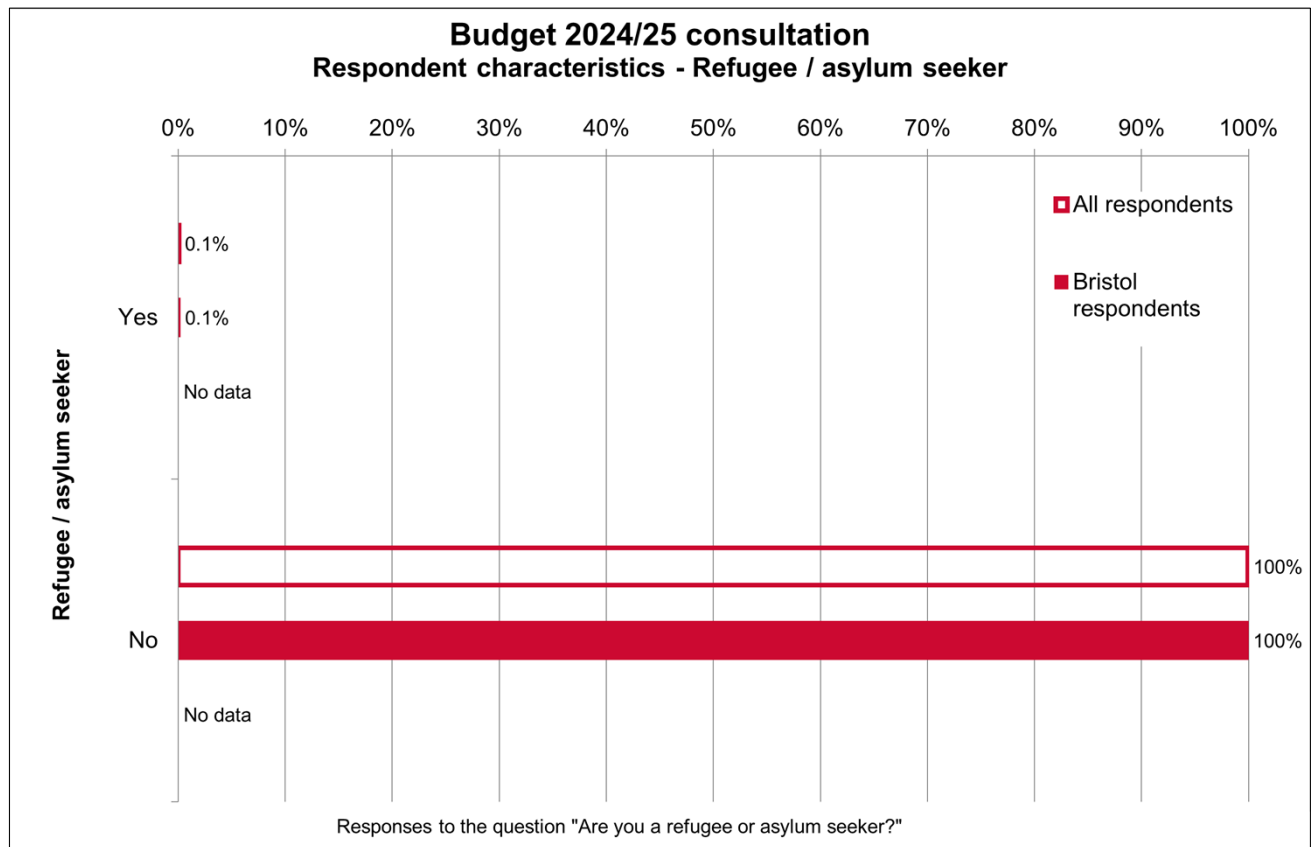


Figure 13: Refugee or asylum seeker status



3.4.10 Other respondent characteristics

2,479 (97%) respondents provided other details of their personal situation, selecting from a list of 12 options. Because respondents could select more than one option, the percentages below exceed 100%.

- 2,430 (98% of the 2,479 respondents who answered the question) are Bristol residents
- 77 (3%) are Bristol City Council employees
- 77 (3%) represent and/or own a local business
- 33 (1%) work in Bristol but live elsewhere
- 14 (1%) responded on behalf of a Voluntary/Community/Social Enterprise/interest group
- 6 (0.2%) responded on behalf of a health or social care provider
- 4 (0.2%) responded on behalf of a school or education provider
- 3 (0.1%) are ward councillors
- 1 (less than 0.1%) responded on behalf of a public transport provider
- 50 (2%) selected 'other'.

Of the 50 respondents who selected 'other':

- 15 are retired
- 5 gave details of their profession
- 4 described their employment status
- 4 reiterated that they are Bristol residents and shared their views on aspects of the council's work
- 3 are carers
- 2 gave details of their voluntary roles.
- 2 are landlords
- 2 stated they are tax-payers
- 2 others pay Council Tax in Bristol but live elsewhere
- 1 is a South Gloucestershire resident and Council Tax-payer
- 1 is a student in Bristol
- 1 is a foster carer
- 1 stated they are a Disabled citizen
- 1 stated they had needed support from the council in the past and were now self-reliant.
- 6 selected 'other' but gave no details.

3.5 Respondents who provided email feedback

12 responses to the consultation were received via email. All 12 emails were received from citizens. These are in addition to the 2,547 survey responses.

The email text has been analysed with the free text responses to question 5 of the survey and is reported with the survey free text feedback in chapter 5.

4 Survey results: level of Council Tax and Social Care Precept

4.1 Level of core Council Tax and Social Care Precept – all respondents

4.1.1 Core Council Tax

Respondents were asked to state which level of Council Tax they would prefer in 2024/25, choosing from the following four options.

- **Option CT0: No increase to Council Tax.** This option would increase our funding gap by £8.2 million and require other savings each year to close the forecast budget gap²¹.
- **Option CT1: An increase of 1% to Council Tax.** This option would raise £5.5 million less than our forecast for 2024/25, so we would have to find £5.5 million more in other savings each year to close the forecast budget gap. This option would contribute £2.7 million to support the delivery of services, and would add around 30 pence per week to the Council Tax bill for Band B properties.
- **Option CT2: An increase of 2% to Council Tax.** This option would raise £2.7 million less than our forecast for 2024/25, so we would have to find £2.7 million more in other savings each year to close the forecast budget gap. This option would contribute £5.5 million to support the delivery of services, and would add around 60 pence per week to the Council Tax bill for Band B properties.
- **Option CT3: An increase of 3% to Council Tax²².** This option would raise £8.2 million to support the delivery of services. This is the amount we have assumed in our forecast for 2024/25. This option would add around 90 pence per week to the Council Tax bill for Band B properties.

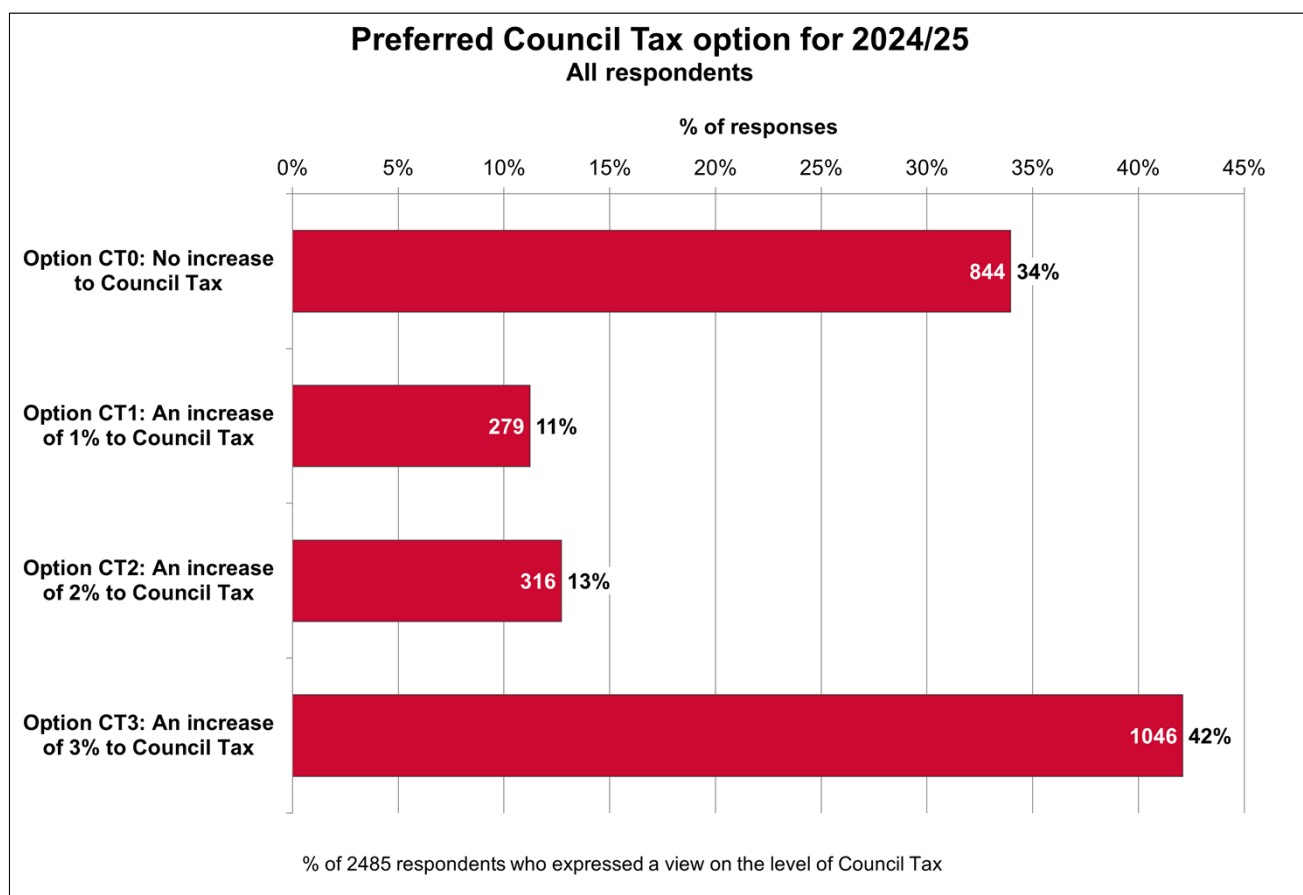
2,485 respondents (98% of the 2,547 people who responded to the consultation survey), stated their preference for the level of core Council Tax. A majority (1,641 respondents; 66%) favour an increase in core Council Tax to support general services in 2024/25 (Figure 14).

- 1,046 (42%) would prefer a 3% increase in core Council Tax. This is the option with the highest support
- 316 (13%) favour a 2% increase
- 279 (11%) favour a 1% increase
- 844 (34%) respondents would prefer 'no increase to Council Tax' in 2024/25. This is the option with the second highest support
- 62 respondents did not give a view on Council Tax.

²¹ In forecasting the budget gap, our planning assumed an increase in Council Tax of 3% and a Social Care Precept of 2% in 2024/25. No decision has been taken on the level of Council Tax increase or Social Care Precept; this will be decided by Full Council in February 2024. Every 1% increase in the level of Council Tax would also raise around £2.7 million towards meeting the council's rising costs.

²² An increase up to 3% in core Council Tax is the maximum permitted without requiring a local referendum.

Figure 14: Preferred level of core Council Tax increase in 2024/25



4.1.2 Social Care Precept

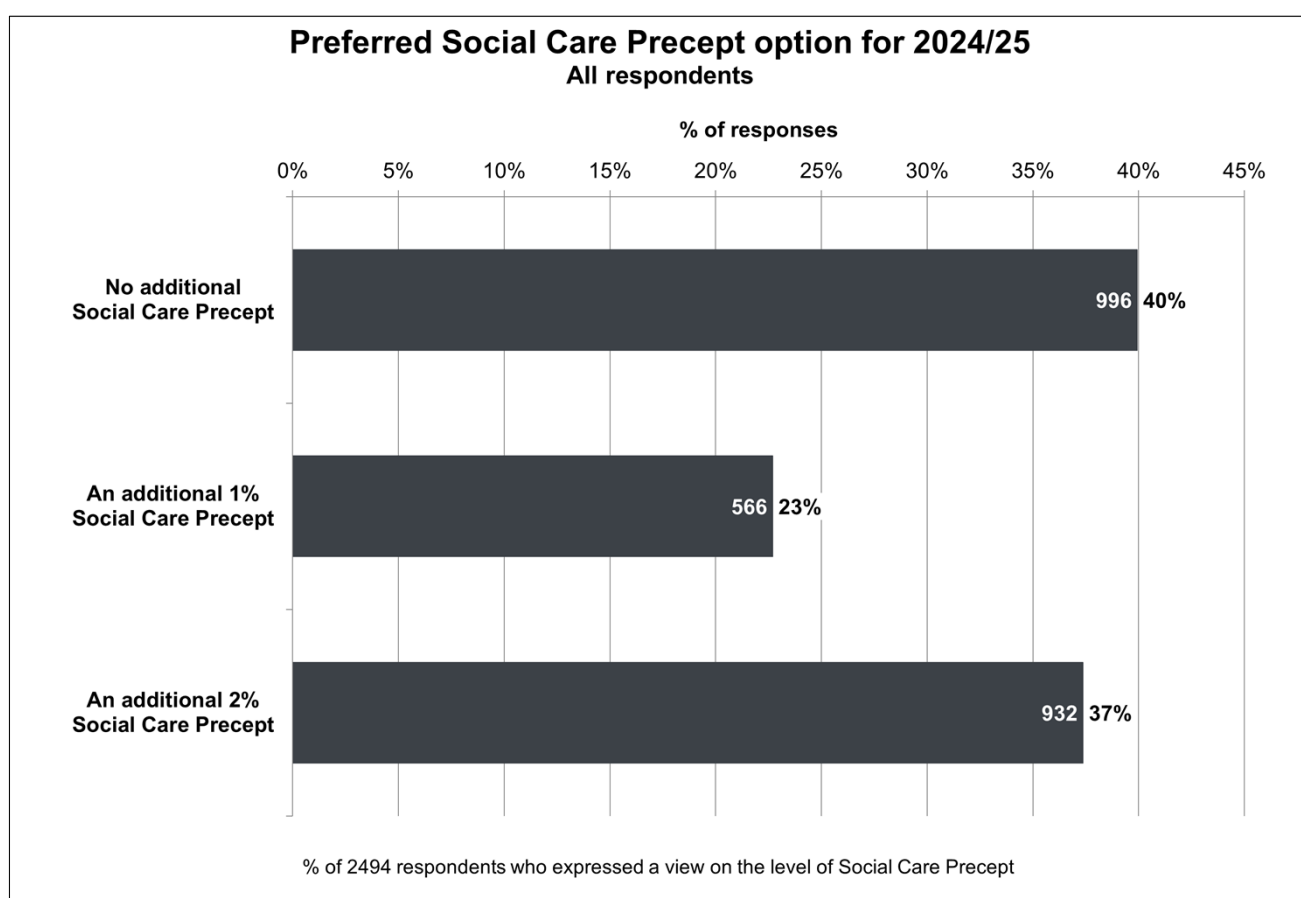
Respondents were also asked to state which level of Social Care Precept they would prefer in 2024/25, choosing from three options:

- **No additional Social Care Precept.** This option would raise no extra income to support the delivery of adult social care in 2024/25. This is £5.5 million less than our forecast for 2024/25, so we would need to find £5.5 million from other sources to fund adult social care.
- **An additional 1% Social Care Precept.** This would be an extra 1% increase to Council Tax in addition to the increase in core Council Tax. This option would raise £2.7 million less than our forecast for 2024/25, so we would need to find £2.7 million from other sources to fund adult social care. This option would contribute £2.7 million to support the delivery of adult social care and would add around 30 pence per week to the Council Tax bill for Band B properties.
- **An additional 2% Social Care Precept.** This would be an extra 2% increase to Council Tax in addition to the increase in core Council Tax. This option would raise £5.5 million to support the delivery of adult social care. This is the amount we have assumed in our forecast for 2024/25. This option would add around 60 pence per week to the Council Tax bill for Band B property.

2,494 respondents (98% of the 2,547 people who responded to the consultation survey), stated their preference for the level of Social Care Precept. A majority (1,498 respondents; 60%), favour some Social Care Precept (on top of core Council Tax) to support the delivery of social care in 2024/25 (Figure 15).

- 932 (37%) would prefer a 2% Social Care Precept. This is the option with the second highest support
- 566 (23%) favour a 1% Social Care Precept
- 966 (40%) respondents would prefer no Social Care Precept in 2024/25. This is the option with the highest support
- 53 respondents did not give a view on Social Care Precept.

Figure 15: Preferred level of Social Care Precept in 2024/25



4.1.3 Combinations of core Council Tax and Social Care Precept

Figure 16 shows the percentage of the 2,547 respondents who prefer each combination of Council Tax increase (0%, 1%, 2% or 3%) and Social Care Precept (0%, 1% or 2%) proposed in the consultation.

In Figure 16, each of the coloured rectangles represents a combination of one Council Tax option (0%, 1%, 2% or 3%) and one Social Care Precept option (0%, 1% or 2%). For example, the top left green rectangle is the combination of no increase to Council Tax and no Social Care Precept. 28% of respondents favour this option. The bottom right green rectangle is a 3% increase to Council Tax and a 2% Social Care precept.

Options with lower support appear red; those with higher support are green.

The rightmost (white) column shows the percentages of respondents who gave their views on each Council Tax option but did not provide a view on Social Care Precept. The bottom row shows the percentages of respondents who gave their views on each Social Care Precept option but did not provide a view on Council Tax.

The numbers in the coloured circles show the total percentage increase in Council Tax plus Social Care Precept for each combination. For example, ② indicates a 2% total increase, which could comprise:

- No Council Tax increase plus 2% Social Care Precept; or
- 1% Council Tax increase plus 1% Social Care Precept; or
- 2% Council Tax increase with no Social Care Precept.

Figure 16: Preferred combinations for Council Tax and Social Care Precept

Percentage of respondents who prefer each combination of Council Tax and Social Care Precept

	No additional Social Care Precept	An additional 1% Social Care Precept	An additional 2% Social Care Precept	No view on Social Care Precept
No increase to Council Tax	28% ①	3% ②	2% ③	0.3%
1% increase to Council Tax	3% ④	7% ⑤	1% ⑥	0.1%
2% increase to Council Tax	3% ⑦	6% ⑧	3% ⑨	0.1%
3% increase to Council Tax	5% ⑩	6% ⑪	30% ⑫	0.2%
No view on Council Tax	0.4%	0.2%	0.3%	1%

Key

- ① No change to Council Tax or Social Care Precept
- ② 1% increase from Council Tax plus Social Care Precept
- ③ 2% increase from Council Tax plus Social Care Precept
- ④ 3% increase from Council Tax plus Social Care Precept
- ⑤ 4% increase from Council Tax plus Social Care Precept
- ⑥ 5% increase from Council Tax plus Social Care Precept

Figure 16 shows that:

- The option with the highest support (30% of 2,547 respondents) is a 3% increase in core Council Tax and a 2% Social Care Precept. This is the maximum increase permitted under government limits announced on 18 December 2023 in the [Provisional local government finance settlement: England, 2024 to 2025](#)
- The second most popular option (28% of 2,547 respondents) is no increase in core Council Tax and no Social Care Precept.
- The third most popular option is 1% increase in core Council Tax and 1% Social Care Precept. This has substantially lower support (7% of 2,547 respondents).
- For options where Council Tax and Social Care Precept are not the same, more respondents favour a higher increase in Council Tax than Social Care Precept. For example:
 - 6% favour 2% increase in core Council Tax with 1% Social Care Precept, compared to 1% who prefer a 1% increase in core Council Tax with 2% Social Care Precept
 - 3% favour 2% increase in core Council Tax with no Social Care Precept, compared to 2% who prefer no increase in core Council Tax with 2% Social Care Precept

4.2 Views on core Council Tax in areas with different levels of deprivation

Views on the preferred level of core Council Tax were compared for respondents in areas with different levels of deprivation, to check for any significant differences. The comparison used the postcodes provided by respondents in Bristol to match each response to one of 10 deprivation bands (deciles) as described in section 3.3.

Figure 17 shows the percentage of respondents from each deprivation decile who want a 0%, 1%, 2% or 3% increase in core Council Tax in 2024/25. This is based on the 1,944 Bristol respondents who stated a preferred option for core Council Tax and provided a full postcode²³. Figure 17 also shows the views of people who did not provide a postcode or gave a non-Bristol postcode, and the aggregate views of all respondents.

Figure 17 shows that preference for higher core Council Tax tends to increase as deprivation reduces.

Support for the maximum **3% increase** in Council Tax is highest in the least deprived 30% of Bristol, with 60% of respondents preferring a 3% increase in decile 9, 53% in decile 8 and 52% in decile 10. Support for a 3% increase is lowest in the most deprived 20% of Bristol; 30% in decile 1 and 28% in decile 2 support a 3% increase.

Support for **no increase** in core Council Tax is highest among respondents in the most deprived 20% of Bristol, with 42% of respondents in decile 1 and 43% in decile 2 favouring no increase. Support for no increase in Council Tax reduces to 22% in decile 9, 24% in decile 8 and 25% in decile 10 (the least deprived 30%).

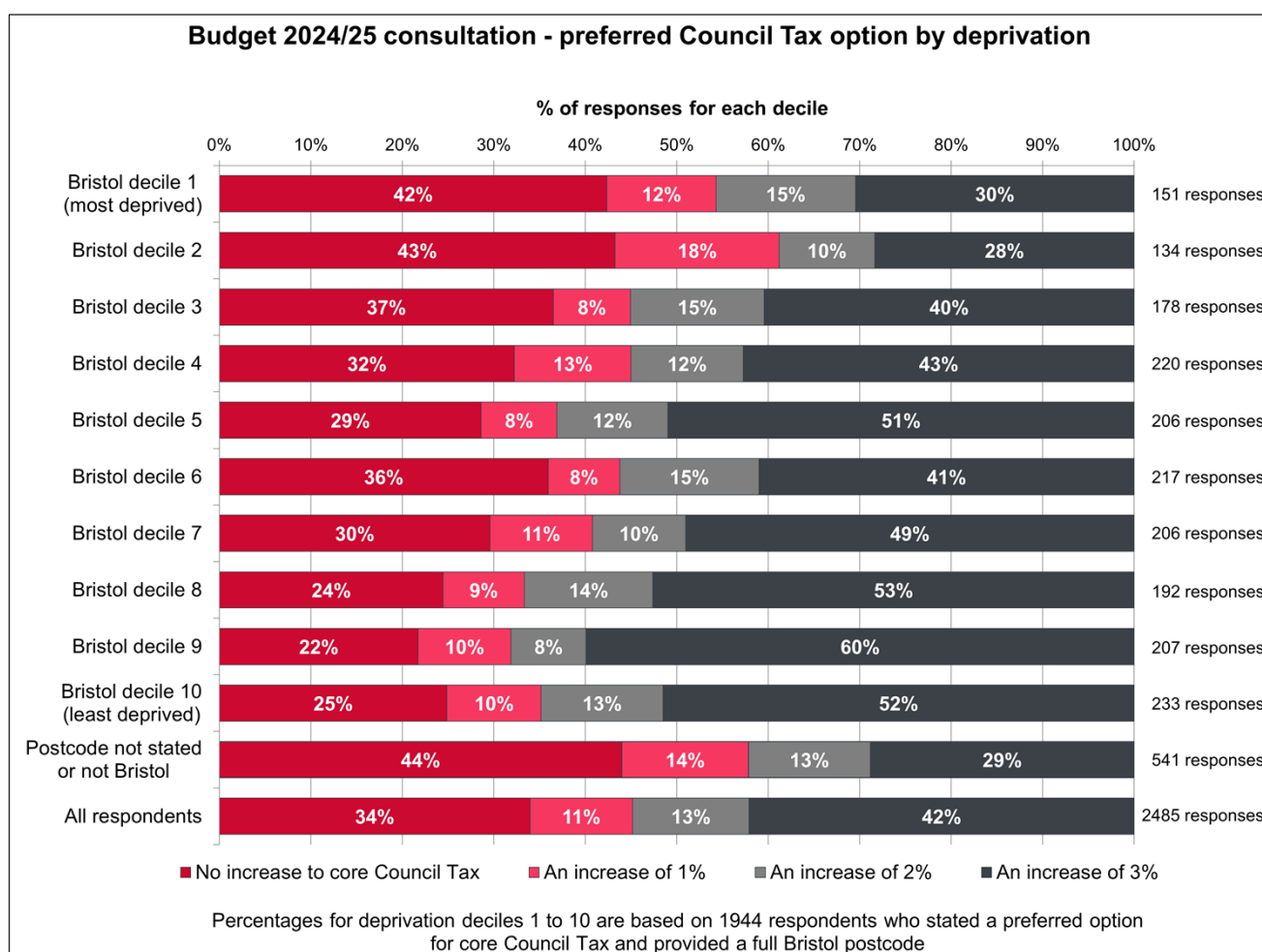
²³ Incomplete postcodes cannot be matched to the deprivation data.

A 3% increase in Council Tax is the most popular option in all deciles except the most deprived deciles 1 and 2. For deciles 1 and 2, no increase is the preferred option (42% of respondents in decile 1; 43% in decile 2) and a 3% increase is the second most popular option (30% of respondents in decile 1; 28% in decile 2).

Support for 1% and 2% increases in Council Tax do not show a clear trend between more deprived and less deprived areas. A 1% increase in Council Tax is the least popular option in six deciles (deciles 1, 3, 5, 6, 8 and 10). A 2% increase in Council Tax is the least popular option in the other four deciles (deciles 2, 4, 7 and 9).

The views of respondents who did not provide a postcode or gave a non-Bristol postcode are similar to an average of the most deprived deciles 1 and 2. 44% in this group favour no increase and 29% support a 3% increase.

Figure 17: Preference in each deprivation decile for the core Council Tax options

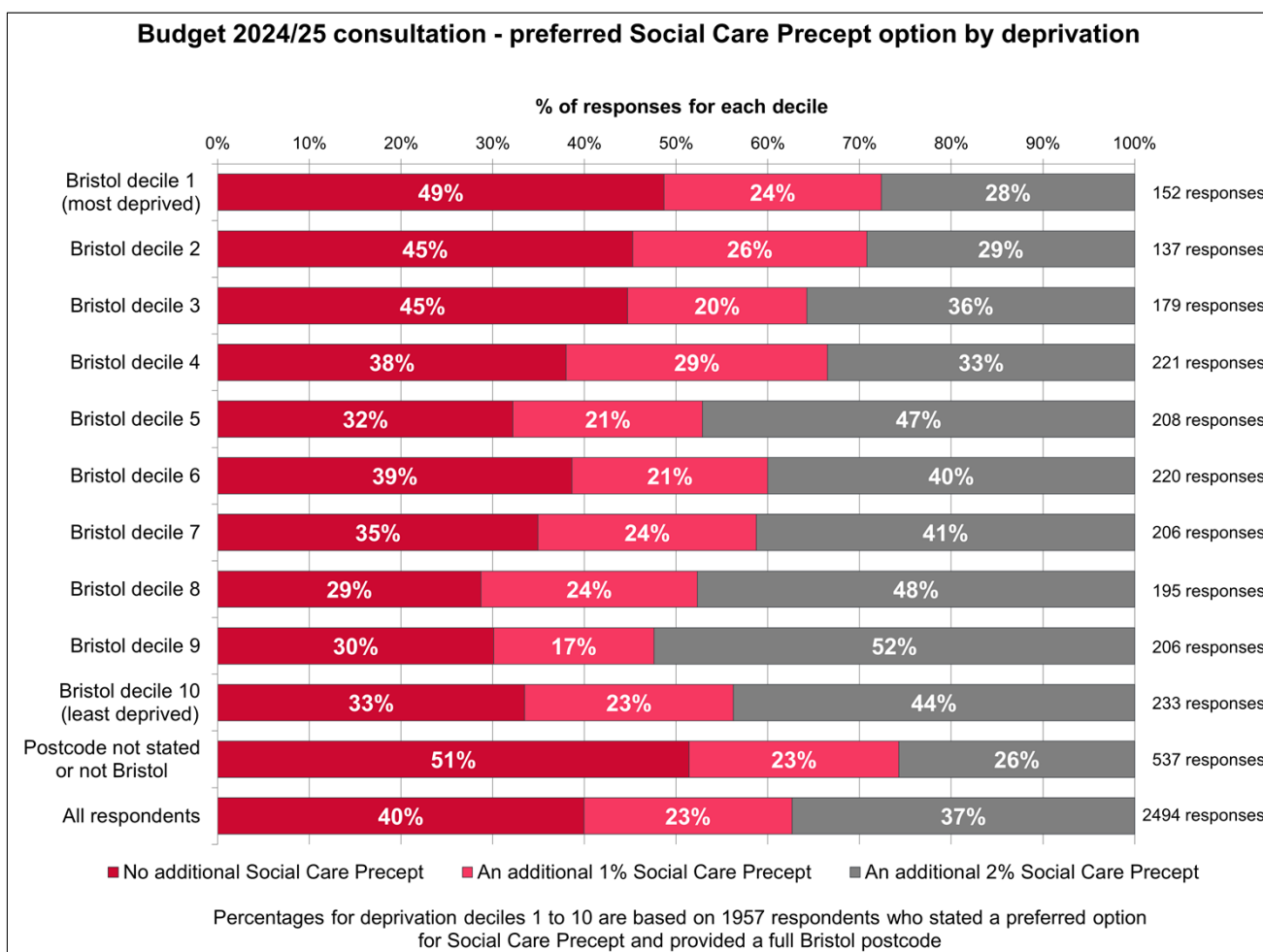


4.3 Views on Social Care Precept in areas with different levels of deprivation

Views on the preferred level of Social Care Precept were also compared for respondents in areas with different levels of deprivation, to check for any significant differences in views.

Figure 18 shows the percentage of respondents from each deprivation decile who want a 0%, 1% or 2% Social Care Precept in 2024/25. This is based on the 1,957 Bristol respondents who stated a preferred option for Social Care Precept and provided a full postcode. Figure 18 also shows the views of people who did not provide a postcode or gave a non-Bristol postcode, and the aggregate views of all respondents.

Figure 18: Preference in each deprivation decile for the Social Care Precept options



As with core Council Tax, support for a Social Care Precept follows an inverse trend with deprivation (Figure 18).

Support for no Social Care Precept decreases from 49% in decile 1 (most deprived) to 29% in decile 8 (with slightly higher figures of 30% in decile 9 and 33% in decile 10). Conversely, support for 2% Social Care Precept increases from 28% in decile 1 to 52% in decile 9 (44% in decile 10).

A 2% Social Care Precept is the most popular option in deciles 5 to 10. In the most deprived deciles 1 to 4, preference for no Social Care Precept exceeds support for a 2% precept.

A 1% Social Care Precept is the least popular option in all deciles.

The views of respondents who did not provide a postcode or gave a non-Bristol postcode are similar to the most deprived decile 1. In this group, 51% favour no increase and 26% support a 2% increase.

Comparison of Figures 17 and 18 shows a greater willingness to pay more Council Tax than Social Care Precept. More people support the maximum 3% increase in Council Tax than support the maximum 2% Social Care Precept, for all deprivation deciles except decile 2. This is also the case for respondents who provided no postcode or a non-Bristol postcode.

4.4 Views on increasing Council Tax more than 3% and Social Care Precept above 2%

4.4.1 Overview

The Budget 2024/25 consultation was launched before the government announced the limits for the level of Council Tax increase or Social Care Precept for 2024/25. To ensure we could take into account the public’s views on any possible scenario the government might announce, respondents were asked if they would be prepared to pay an increase of more than 3% in core Council Tax and/or more than 2% Social Care Precept, if the government announced this is permitted in 2024/25.

The [Provisional local government finance settlement: England, 2024 to 2025](#) published on 18 December 2023 set out that these larger increases would not be permitted in 2024/25.

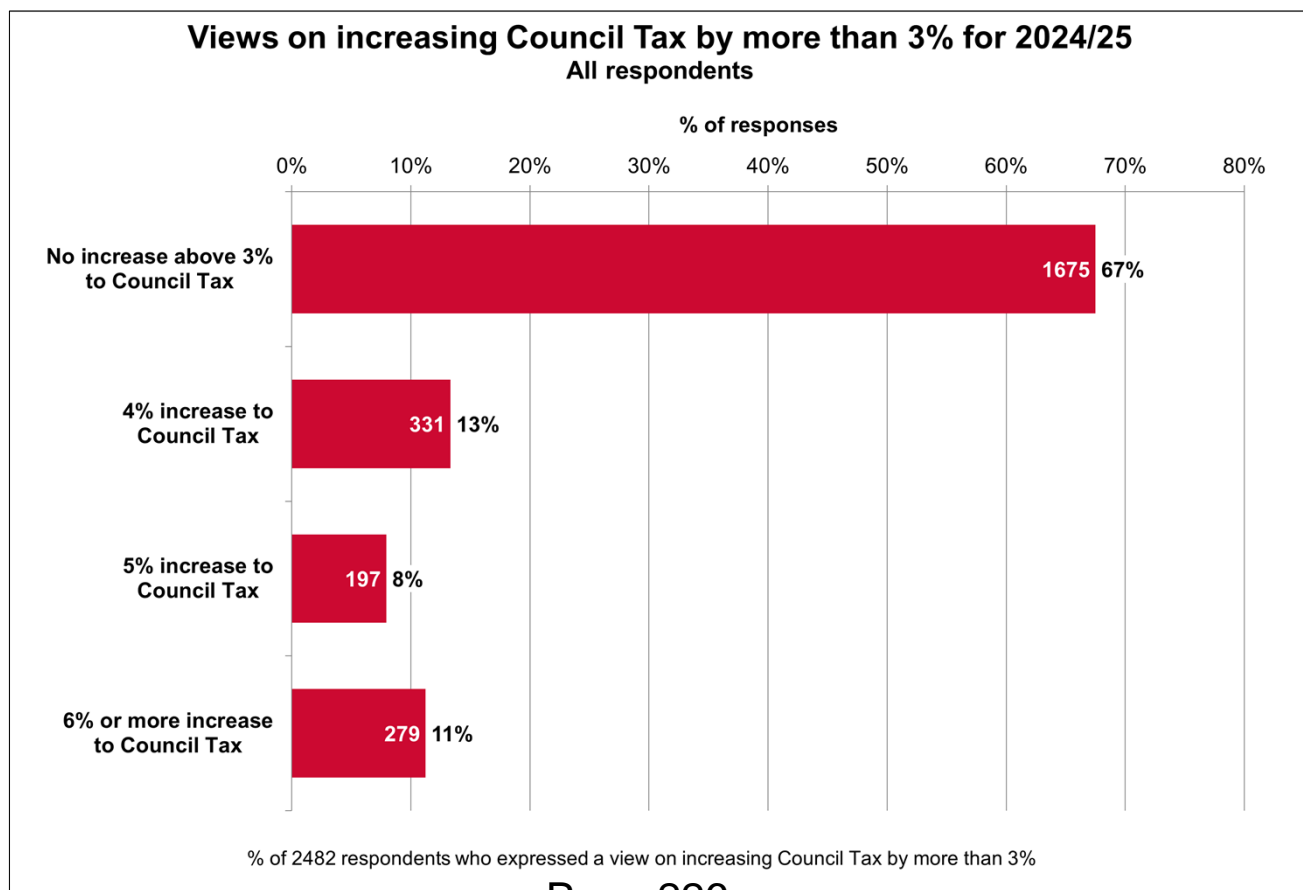
4.4.2 An increase in core Council Tax of more than 3%

Respondents were asked if they would prefer to pay no increase in Council Tax above 3%, or an increase of 4%, 5%, or 6% or more in 2024/25, in case the government allowed this.

2,482 respondents (97% of 2,547 surveys) stated their preference (Figure 19). Of these:

- 1,675 (67%) opted for no increase above 3% to core Council Tax
- 331 (13%) favour a 4% increase
- 197 (8%) favour a 5% increase
- 279 (11%) respondents would support an increase of 6% or more to Council Tax
- 65 respondents did not give a view on increasing Council Tax above 3%.

Figure 19: Views on increasing Council Tax by more than 3%



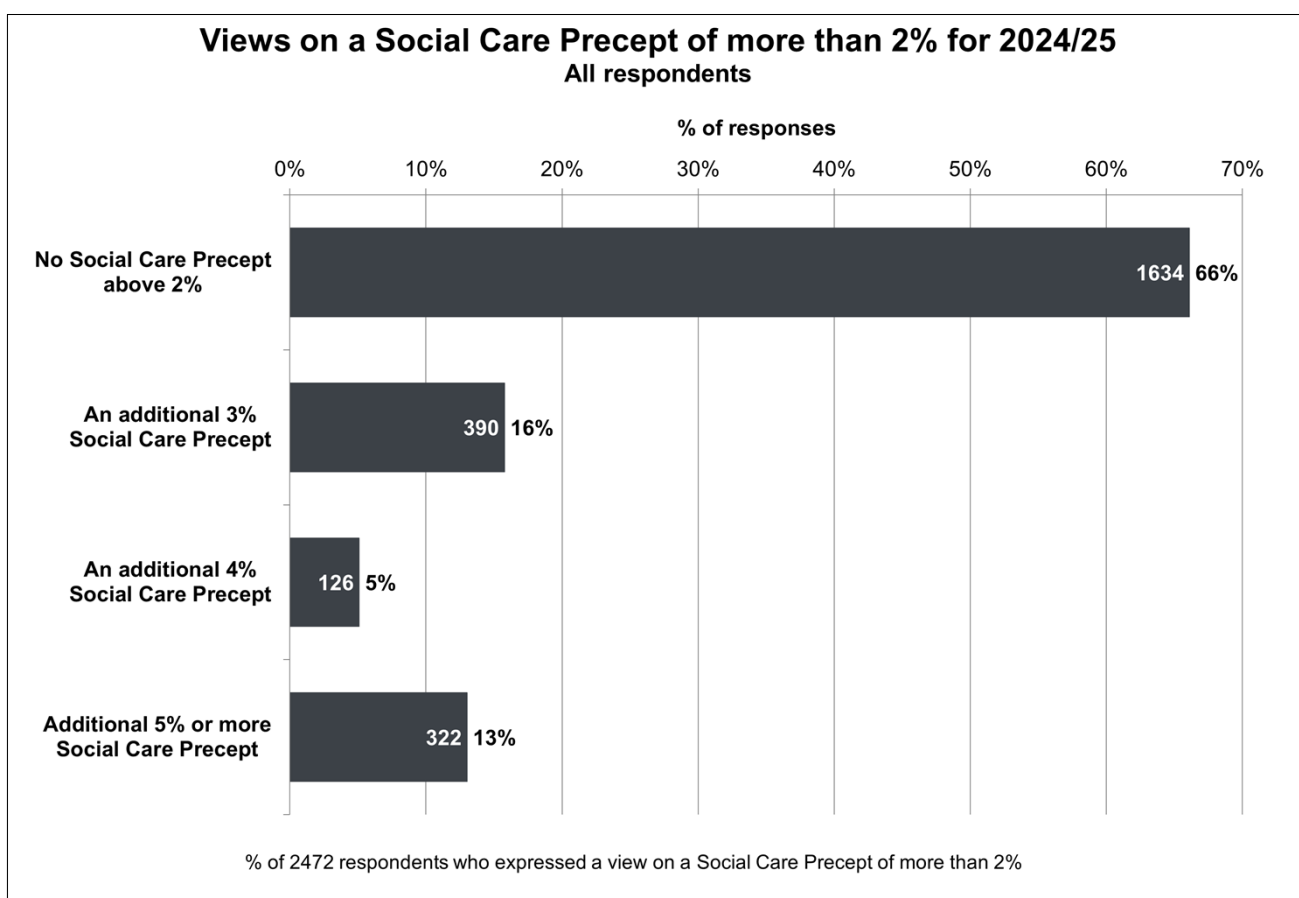
4.4.3 A Social Care Precept of more than 2%

Respondents were asked if they would prefer to pay no Social Care Precept above 2%, or a Social Care Precept of 3%, 4%, or 5% or more in 2024/25, in case government allowed this.

2,472 respondents (97% of 2,547 surveys) stated their preference (Figure 20). Of these:

- 1,634 (66%) opted for no Social Care Precept above 2%
- 390 (16%) would prefer a 3% Social Care Precept
- 126 (5%) favour a 5% Social Care Precept
- 322 (13%) respondents would support a Social Care Precept 6% or more
- 75 respondents did not give a view on a Social Care Precept of more than 2%.

Figure 20: Views on a Social Care Precept of more than 2%



4.4.4 Combinations of Council Tax increase above 3% and Social Care Precept above 2%

Figure 21 shows the percentage of the 2,547 respondents who prefer each combination of the options for Council Tax increase above 3% and Social Care Precept of more than 2%.

In Figure 21, each of the coloured rectangles represents a combination of one Council Tax option (no increase above 3%, or increases of 4%, 5%, or 6% or more) and one Social Care Precept option (no precept above 2%, or a precept of 3%, 4%, or 5% or more). For example, the top left green rectangle is the combination of no increase above 3% to Council Tax and no Social Care Precept above 2%. 57% of respondents favour this option. The bottom right green rectangle is an increase of 6% or more to Council Tax and a Social Care precept of 5% or more. Options with lower support appear red; those with higher support are green.

The rightmost (white) column shows the percentages of respondents who gave their views on each Council Tax option but did not provide a view on Social Care Precept. The bottom row shows the percentages of respondents who gave their views on each Social Care Precept option but did not provide a view on Council Tax.

The numbers in the coloured circles show the total percentage increase in Council Tax plus Social Care Precept for each combination. For example, 8 indicates an 8% total increase, which could comprise:

- 5% Council Tax increase plus 3% Social Care Precept; or
- 4% Council Tax increase plus 4% Social Care Precept.

Figure 21: Views on combinations of higher Council Tax and Social Care Precept

Percentage of respondents who prefer each combination of Council Tax increase above 3% and Social Care Precept above 2%

	No Social Care Precept above 2%	An additional 3% Social Care Precept	An additional 4% Social Care Precept	An additional 5% or more Social Care Precept	No view on Social Care Precept above 2%
No increase above 3% to Council Tax	57% ≤5	6% ≤6	1% ≤7	1% ±8	1%
4% increase to Council Tax	4% ≤6	7% 7	1% 8	1% ≥9	0.4%
5% increase to Council Tax	1% ≤7	2% 8	3% 9	2% ≥10	0%
6% or more increase to Council Tax	1% ±8	0% ≥9	0% ≥10	9% ≥11	0%
No view on an increase above 3% to Council Tax	1%	0.1%	0.1%	0.1%	1%

Key

- ≤5 No more than 5% increase from Council Tax plus Social Care Precept
- ≤6 No more than 6% increase from Council Tax plus Social Care Precept
- ≤7 No more than 7% increase from Council Tax plus Social Care Precept
- ±8 No more than 3% increase from Council Tax plus 5% or more Social Care Precept OR no more than 2% Social Care Precept plus 6% or more increase in Council Tax
- 7 7% increase from Council Tax plus Social Care Precept
- 8 8% increase from Council Tax plus Social Care Precept
- 9 9% increase from Council Tax plus Social Care Precept
- ≥9 9% or more increase from Council Tax plus Social Care Precept
- ≥10 10% or more increase from Council Tax plus Social Care Precept
- ≥11 11% or more increase from Council Tax plus Social Care Precept

Figure 21 shows that:

- The option with the highest support (57% of 2,547 respondents) is no increase above 3% to core Council Tax and no Social Care Precept above 2%.
- The second most popular option is an increase of 6% or more to Council Tax and a Social Care precept of 5% or more. This is the maximum option included in the budget consultation. This option has substantially lower support (9% of 2,547 respondents) than the no further increases option.
- The third most popular option is a 4% increase in core Council Tax and 3% Social Care Precept. This favoured by 7% of 2,547 respondents.
- Options with much higher Council Tax and low Social Care Precept (bottom left area of Figure 21), or low Council Tax and much higher Social Care Precept (top right area of Figure 21) are the least popular
- 38% of respondents²⁴ would select combination of core Council Tax increase above 3% and/or Social Care Precept above 2% if levels of core Council Tax above 3% and Social Care Precept above 2% were permitted by national government. Note that this is more than the 30% who opted for the maximum permitted 3% core Council Tax and 2% Social Care Precept in questions 1 and 2 (section 4.1.3)

4.5 Views on increasing Council Tax above 3% for areas of different deprivation

Views on an increase in core Council Tax above 3% were compared for respondents in areas with different levels of deprivation, to check for any significant differences. The comparison used the postcodes provided by respondents in Bristol to match each response to one of 10 deprivation bands (deciles) as described in section 3.3.

Figure 22 shows the percentage of respondents from each deprivation decile who would prefer to pay no increase in Council Tax above 3%, or an increase of 4%, 5%, or 6% or more in 2024/25, if the government allowed it. This is based on the 1,946 Bristol respondents who stated a preferred option for increases in core Council Tax above 3% and provided a full postcode²⁵. Figure 22 also shows the views of people who did not provide a postcode or gave a non-Bristol postcode, and the aggregate views of all respondents.

Figure 22 shows that no increase above 3% for core Council Tax is the most popular option in all deciles, supported by between 55% and 80% of respondents.

Preference for higher core Council Tax tends to increase as deprivation reduces. This trend broadly mirrors the results in Figure 17 for Council Tax options up to 3%.

²⁴ 38.4% of respondents would select a core Council Tax increase of 4% or more and/or a Social Care Precept of 3% or more. The 38.4% excludes the 4.1% of respondents who did not give a view on Council Tax and or Social Care Precept (the white row and column in Figure 21) and the 57.4% who opted for no increase above 3% to core Council Tax and no Social Care Precept above 2%.

²⁵ Incomplete postcodes cannot be matched to the deprivation data.

Support for the maximum increase of **6% or more** in Council Tax is highest in decile 9 at 16%. Support for an increase of 6% or more is lowest in the most deprived 20% of Bristol; 5% in decile 1 and 8% in decile 2.

Support for a **5% increase** in core Council Tax similarly rises as deprivation decreases, from 5% in the most deprived 20% of areas (deciles 1 and 2) to 15% in decile 9.

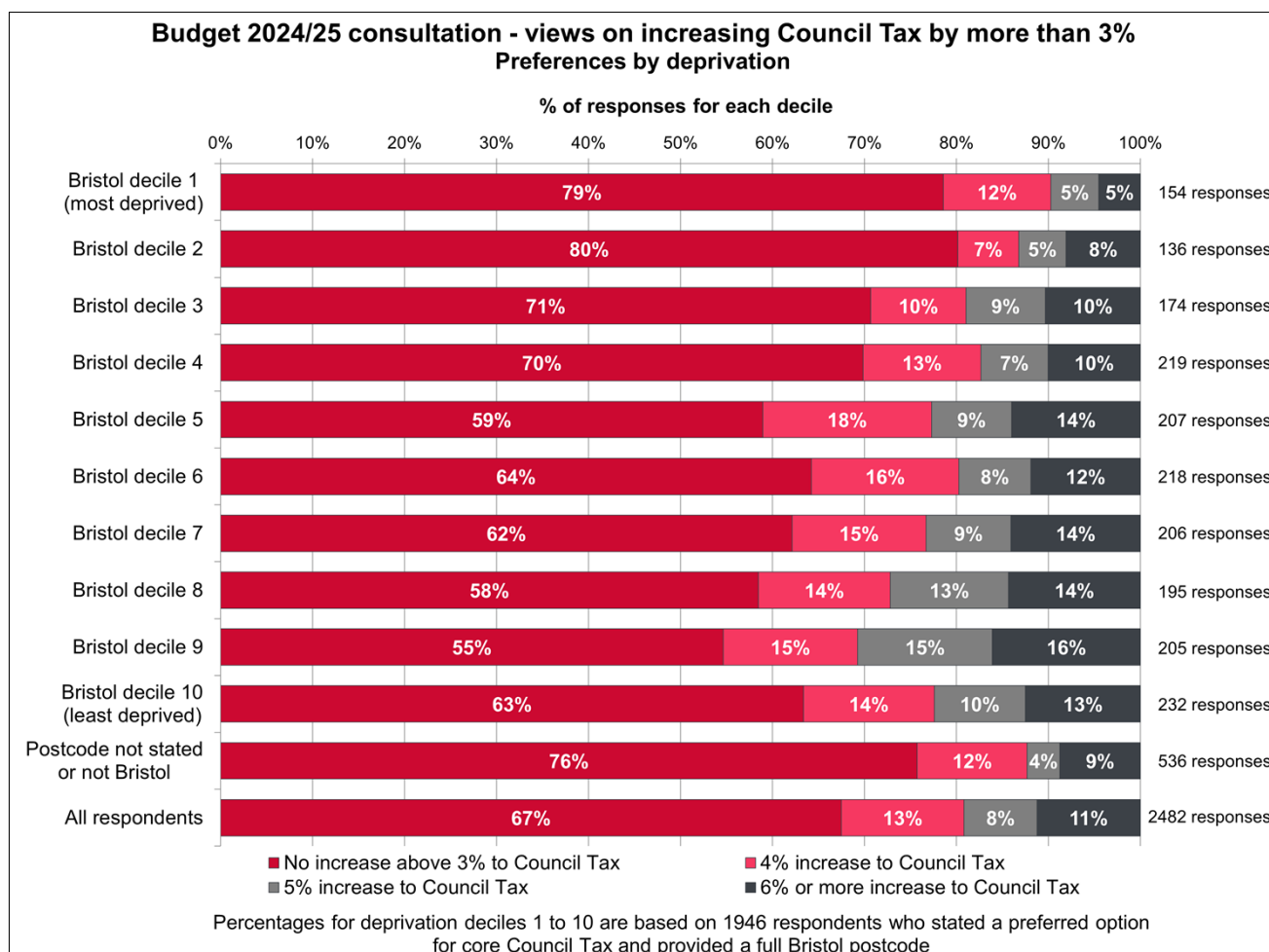
Support for a **4% increase** shows a weaker trend, but support for this option is still higher in the least deprived 30% of areas, than the most deprived 30%.

Support for **no increase above 3%** in core Council Tax is highest among respondents in the most deprived 20% of Bristol, with 79% of respondents in decile 1 and 80% in decile 2 preferring no increase above 3%. Support for no increase above 3% for core Council Tax reduces to 58% in decile 8 and 55% in decile 9.

Respondents in the least deprived decile 10 deviate from this trend, by showing lower willingness than decile 9 to pay more. 13% of respondents in decile 10 opted for a core Council Tax increase of 6% or more, 10% prefer a 5% increase, and 63% favour no increase above 3%.

The views of respondents who did not provide a postcode or gave a non-Bristol postcode are similar to an average of the most deprived deciles 1 and 2. 76% in this group favour no increase above 3%, and 9% support an increase in corer Council Tax of 6% or more.

Figure 22: Preference in each deprivation decile for core Council Tax above 3%

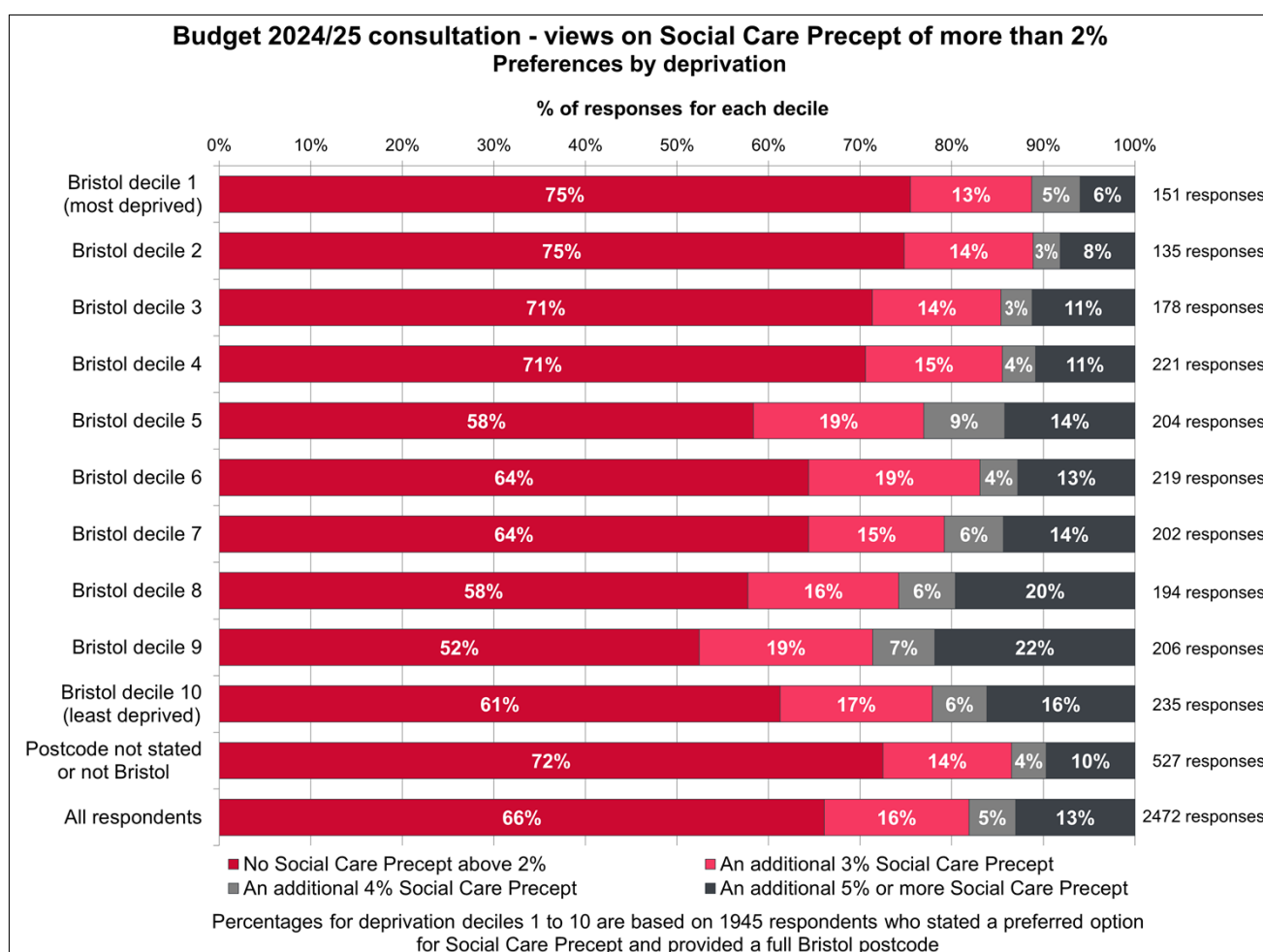


4.6 Views on increasing Social Care Precept above 2% for areas of different deprivation

Views on a Social Care Precept above 2% were compared for respondents in areas with different levels of deprivation, to check for any significant differences. The comparison used the postcodes provided by respondents in Bristol to match each response to one of 10 deprivation bands (deciles) as described in section 3.3.

Figure 23 shows the percentage of respondents from each deprivation decile who would prefer to pay no Social Care Precept above 2%, or a Social Care Precept of 3%, 4%, or 5% or more in 2024/25, if the government allowed it. This is based on the 1,945 Bristol respondents who stated a preferred option for increases in Social Care Precept above 2% and provided a full postcode²⁶. Figure 23 also shows the views of people who did not provide a postcode or gave a non-Bristol postcode, and the aggregate views of all respondents.

Figure 23: Preference in each deprivation decile for Social Care Precept above 2%



²⁶ Incomplete postcodes cannot be matched to the deprivation data.

Figure 23 shows that no Social Care Precept above 2% is the most popular option in all deciles, supported by between 52% and 75% of respondents.

Preference for higher Social Care Precept tends to increase as deprivation reduces. This trend broadly mirrors the results in Figure 18 for Social Care Precept options up to 2%.

Support for the maximum Social Care Precept option of **5% or more** is highest in decile 9 at 22%. Support for a precept of 5% or more is lowest in the most deprived 20% of Bristol; 6% in decile 1 and 8% in decile 2.

Support for a **4% Social Care Precept** rises as deprivation decreases, from between 3% and 5% in the most deprived 30% of areas (deciles 1, 2 and 2) to 7% in decile 9.

Support for a **3% Social Care Precept** increases from 13% to 14% in the most deprived deciles 1, 2 and 3 to 19% in decile 9.

Support for **no Social Care Precept above 2%** is highest among respondents in the most deprived 20% of Bristol, with 75% of respondents in deciles 1 and 2. Support for no Social Care Precept above 2% reduces to 52% in decile 9.

Respondents in the least deprived decile 10 deviate from this trend, by showing lower willingness than decile 9 to pay more. 16% of respondents in decile 10 opted for a Social Care Precept of 5% or more, 6% prefer a 4% precept, 17% prefer a 3% precept, and 61% favour no precept above 2%.

The views of respondents who did not provide a postcode or gave a non-Bristol postcode are similar to an average of the most deprived deciles 1, 2 and 3. 72% in this group favour no Social Care Precept above 2%, and 10% support a Social Care Precept of 5% or more.

4.7 Reasons for Council Tax and Social Care Precept levels chosen

4.7.1 Overview

Of the 1,158 free text survey and email responses, 738 (64%) explained their preference for the level of Council Tax or made other comments about Council Tax. 295 (25%) provided comments about Social Care Precept.

4.7.2 Comments about Council Tax

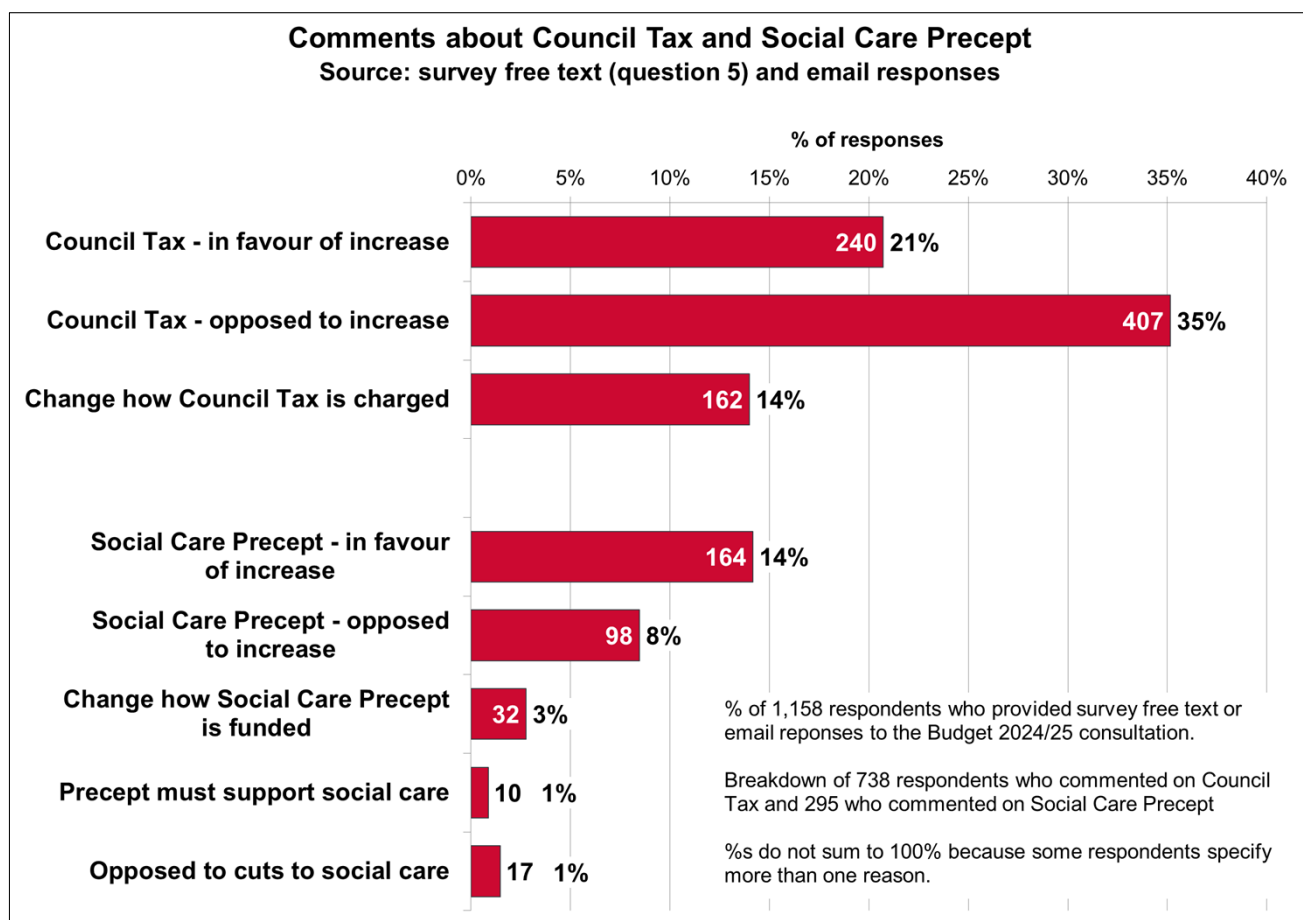
4.7.2.1 Summary

Of the 738 respondents (64%) who made comments or suggestions about Council Tax (Figure 24):

- 240 (21% of 1,158 respondents) made comments in favour of increasing Council Tax
- 407 (35%) gave reasons why they oppose an increase to Council Tax
- 162 (14%) said that they thought that Council Tax should be charged in a different way.

A further breakdown of these comments is provided below. All percentages are percentages of the 1,158 free text survey and email responses. Because a single respondent might comment on several issues, the total percentages will exceed 100%.

Figure 24: Comments about Council Tax and Social Care Precept



4.7.2.2 Comments in favour of increasing Council Tax

240 (21%) respondents made comments in support of increasing Council Tax. Comments addressed the following issues.

- **Support for a Council Tax increase**
 - Recognition that Council Tax increases and increased funding are necessary due to government cuts and financial challenges
 - In stating support for an increase, respondents drew attention to economic challenges, including inflation, the rising cost of living, and the need for a fair and just distribution of financial burdens
 - Calls for a balanced approach to the increase considering both the need for increased funding and the financial constraints of many residents
 - Importance of affordability in determining the extent of the tax increase
- **Acknowledgment of personal affordability**
 - Higher earning individuals stated their willingness to contribute more to support essential services
- **Importance of essential services**
 - Importance of maintaining or improving local services despite inflationary pressures on incomes
 - Recognition that increased public spending is necessary to improve efficiency and capacity
 - Recognition of the community's responsibility to support essential services
 - Expressions of social awareness and a sense of duty to contribute to the well-being of the city's residents
 - Willingness to pay higher Council Tax to prevent cuts to essential services for vulnerable populations, emphasising the importance of services for both adults and children
- **Transparency and accountability**
 - Requests for assurance that increased taxes will result in tangible improvements for citizens
 - Desire for transparency in how additional funds will be utilised
 - Calls for robust accountability mechanisms to ensure the effective use of increased tax revenue
- **Suggestions for the appropriate percentage increase for Council Tax:**
 - This was often linked to personal circumstances (highly dependent on individual income), inflation rate or the perceived needs of the service. Respondents advocated for balance between the tax burden on citizens and the budget needs of the council.

4.7.2.3 Comments from respondents opposed to increasing Council Tax

407 (35%) respondents provided free text comments opposed to an increase to Council Tax. Among these respondents, there was widespread acknowledgement that services are important and need to be funded, but an unwillingness to pay more Council Tax. Respondents gave the following reasons.

- **Financial difficulties and cost of living**
 - Challenges in heating homes and maintaining a minimal food budget, with fears that increased Council Tax would put a further strain on their situation, particularly for single parents
 - High cost of living/inability to make ends meet, contributing to homelessness and potential eviction due to missed mortgage payments
 - Concerns about increased criminal activity due to financial struggles of other citizens
- **Doubts about the council's effective allocation of Council Tax funds**
 - Respondents were concerned that funds would not be used to address specific issues faced by, and of importance to, respondents. One respondent voiced reticence to pay more without more information about the council's accounts
- **Suggestions for alternative solutions to an increase**
 - Recommendations for alternatives to increasing Council Tax were cuts to services and service budgets, better investment strategies, and streamlining Bristol City Council.

4.7.2.4 Suggestions for how Council Tax should be charged differently.

162 (14%) respondents suggested changes to the way that Council Tax is charged overall. Comments and suggestions included the following.

- **Comprehensive reassessment of Council Tax bands:** This included criticism of the existing “antiquated” banding system. Recommendations were for reassessments to be based on:
 - Property size
 - Street space, and local facilities
 - Raising taxes proportionately to income in certain areas
- **Graduated increases to Council Tax:** Graduated increases would involve higher bands paying a larger percentage uplift. Suggested charging structures included:
 - A graduated increase where band C would pay 1% more, bands D and E would pay 3% more, and bands F, G, and H would pay 5% more
 - No increase for bands A to C, a 3% increase for bands D to F, and 5% or more for bands G and H

- **A means-tested approach**
 - Recommendations for means-testing Council Tax rates based on factors such as income, wealth, household size, and age of residents
 - Time-limited increases: households earning above a certain threshold with a high disposable income would pay a higher Council Tax for a specific duration. This would be set at five years for new residents in Bristol and two years for people who currently live in Bristol
 - Explore the option of doubling Council Tax on second homes, to be aimed at individuals less engaged in the community
- **Exemptions, reductions, and incentives**
 - Calls for Council Tax exemptions for individuals over 65 and reduced rates for individuals living alone
 - Perceived inequity in Council Tax for multiple residents in flats compared to single occupants in larger properties
 - Consider a discount for people who pay Council Tax bills on time. This could encourage prompt payment and reduce the costs of chasing council tax debt
- **A flat fee for adults**
 - Charge Council Tax as a flat fee for every adult over 18, eliminating the connection to property size
- **Flexibility in allocation**
 - More choice for citizens in decisions about how Council Tax is spent
- **Student contributions**
 - Proposal to require financial contributions from students as part of the Council Tax system
 - Proposal to require financial contributions from universities
- **Landlords and housing**
 - Recommendations included increasing taxes on landlords, particularly those renting to students, and introducing Short Term Let licenses to regulate Airbnb operations. This aimed both to generate additional revenue for the council and alleviate the impact of Airbnb on permanent residents
- **Specific tax initiatives**
 - More local tax-raising powers through devolution
 - Adopting initiatives akin to B&NES Council's approach, focusing on levying additional funds through similar mechanisms
 - A proposal to deduct funds from people with 'non'dom' status and the salaries of Members of Parliament (MPs) to contribute to council finances.

4.7.3 Comments about Social Care Precept

4.7.3.1 Summary

Of the 295 respondents (25%) who made comments or suggestions about Social Care Precept (Figure 24), there was a diverse range of opinions:

- 164 (14% of 1,158 respondents) commented in favour of increasing Social Care Precept.
- 98 (8%) gave reasons why they oppose an increase to Social Care Precept
- 32 (3%) said there should be a change to how Social Care Precept is charged
- 10 (1%) said that any Social Care Precept must be used to support social care
- 17 (1%) voiced their opposition to cuts to social care.

4.7.3.2 Comments in favour of increasing Social Care Precept

Of the 164 (14%) respondents who said they favour increasing Social Care Precept, comments included:

- **Recognition of the increasing demand**, and essential need, for social care to address the challenges for vulnerable individuals
- **Prevailing sentiment against cuts**, emphasising the importance of maintaining high-quality social care services, and the long-term community benefits of funding social care
- **Groups that were identified as a priority** to receive social care support were elderly people, especially people with dementia, and other vulnerable individuals
- **Emphasis on the moral duty to contribute** through taxes, expressing trust in local government efficiency
- **Ability to pay**. Some higher-income respondents stated their willingness to pay more for social care support because they could afford to
- **Support for funding social care, but with qualifications**, including:
 - Preference for a precept of less than the maximum 2% permitted, considering the cost-of-living crisis. Some respondents mentioned their personal financial struggles and a proposed proportionate tax increase
 - Willingness to pay more but with insistence on accountability. Whilst in favour of the overall Social Care Precept, some respondents voiced concerns about the council's level of accountability, and ability to balance affordability with effective services
 - Conditional support for the Social Care Precept, with support only if the money is focussed on helping specific groups, including the elderly, young children, and British nationals.

4.7.3.3 Comments opposed to increasing Social Care Precept

Of the 98 (8%) respondents who said why they oppose an increase in Social Care Precept, comments included:

- **Efficiency improvements are needed in social care before seeking more funding.**
 - Respondents advocated addressing existing challenges within the social care system before approving additional funding, emphasising the need for systemic improvement to enhance efficiency and effectiveness
 - Respondents criticised the amount of spending on senior managers, citing a disparity in pay between ordinary care staff and management. They stated this has a negative impact on expertise and customer service levels
- **Scepticism about the cost-effectiveness of adult and social care services**
 - Respondents questioned the value for money in relation to the weekly cost of care. And voiced scepticism about the necessity of additional funds
 - Comments stressed the need for transparent and accountable spending practices
- **Scepticism that the Social Care Precept will be spent on social care and the vulnerable people who need support**
- **Dissatisfaction with high amounts spent on social care to the detriment of other priorities.** This extends to concerns about high spending levels (which respondents consider excessive) on adult social care, children's social care, and housing benefits. Comments included:
 - Respondents saying that they don't need or benefit from social care, resent paying for it, and have other priorities for spending that are more important to them
 - Discontent about the substantial portion of council funds directed towards adult/older people's social care, with a view that there needs to be fairer distribution and responsiveness to the needs of the younger working generation
 - Concerns about the impact of social care budgets reducing funding available for other public services, including healthcare, law enforcement, infrastructure, and housing. Respondents emphasised the need for balanced resource allocation
- **Social care should be funded by older people's personal resources before taxpayer money²⁷.**
 - Respondents suggested using the accumulated wealth and income of older people who need social care, before tapping into additional funds from the working population
 - Comments emphasised a desire for shared responsibility and resource contribution.

²⁷ This point is included under two themes; comments opposing a Social Care Precept, and again under the theme of Changing how social care is charged

4.7.3.4 Change how Social Care Precept is funded.

32 (3%) recommended other ways social care should be funded, instead of by a local Social Care Precept. These were:

- **Central government funding**, via National Insurance and other central government funds, not raised by local authorities
- **Integrated healthcare system**: Advocates for integrating social care with the NHS to create a more cohesive healthcare system
- **Means-testing social care**: Proposals to adjust financial responsibilities, including making the elderly pay more for their benefits and targeting higher Council Tax bands/higher incomes
- **Accountability by older voters**: Suggestions that older people, who have elected governments that have overseen the social care funding problems, should now contribute more to their benefits – owning the consequences of their policy preferences, particularly in terms of paying for their own social care
- **The Social Care Precept should be included in Council Tax**. The respondent thinks that separating the percentage increases in core Council Tax and Social Care Precept is confusing and deceptive
- **Explore radical solutions for social care**: Bristol City Council should start a public debate on what we can all do, as local communities, to solve escalating social care costs.

4.7.3.5 Assurance that Social Care Precept will be used to support social care.

Of the 10 (1%) respondents who said that Social Care Precept must be used to fund social care, comments were:

- Hope, but also scepticism, that a Social Care Precept would be used for its intended purpose. Respondents wanted assurance that increased funding for social care will be directed specifically to social care and not diverted to other projects
- Call for more transparency and better communication regarding fund utilisation
- Call for a review/monitoring system to ensure that resources reach the intended beneficiaries
- A perception that social care is given too easily to people who could work and be more self-sufficient.

4.7.3.6 Comments opposed to cuts in Social Care

Of the 17 (1%) respondents who said they oppose cuts to social care services, comments included:

- **Preference for avoiding cuts to local services**, advocating for a balanced budget without further reductions
- **Impact of under-funded social care on the NHS, with a focus on hospitals.** Respondents highlighted the urgency of addressing issues such as bed blocking in hospitals, stressing the impact of social care shortages on NHS waiting times
- **The need to preserve vital social care services by saving money elsewhere:**
 - Respondents proposed exploring alternative avenues for cost savings without cutting social care services, emphasising the importance of maintaining adult social care services
 - Concerns about stretched services, with a call for better management of council funding to prevent cuts in essential services
 - Respondents specifically called on the council to fulfil its duties for adult social care and SEND, suggesting that cuts should be explored elsewhere
- **Support for displaced refugee families:** Recommendations to allocate more funds to support displaced refugee families, which would enable them to contribute to the local economy and public services.

5 Proposals for saving money and generating income.

5.1 Overview

This chapter describes respondents' free text comments and suggestions about issues other than proposed levels of Council Tax and Social Care Precept (which are described in section 4.7). Of the 1,158 free text survey and email responses:

- 2 respondents (0.2%) provided comments on the savings proposals to reduce the budget gap (section 5.2)
- 380 (33%) suggested other ways the council could save money (section 5.3)
- 142 (12%) suggested other ways the council could increase income (section 5.4)
- 70 (6%) identified services they think are priorities to continue to fund (section 5.5)
- 19 (2%) provided other comments or suggestions (section 5.6)
- 24 (2%) provided comments about the consultation process (section 5.7).

5.2 Comments on savings proposals and 'invest to save' ideas

One respondent questioned how renting properties direct from landlords (proposal GAP048 described in the budget consultation) would reduce costs.

The same respondent voiced opposition to 'proposed cuts to the disabled support service'.

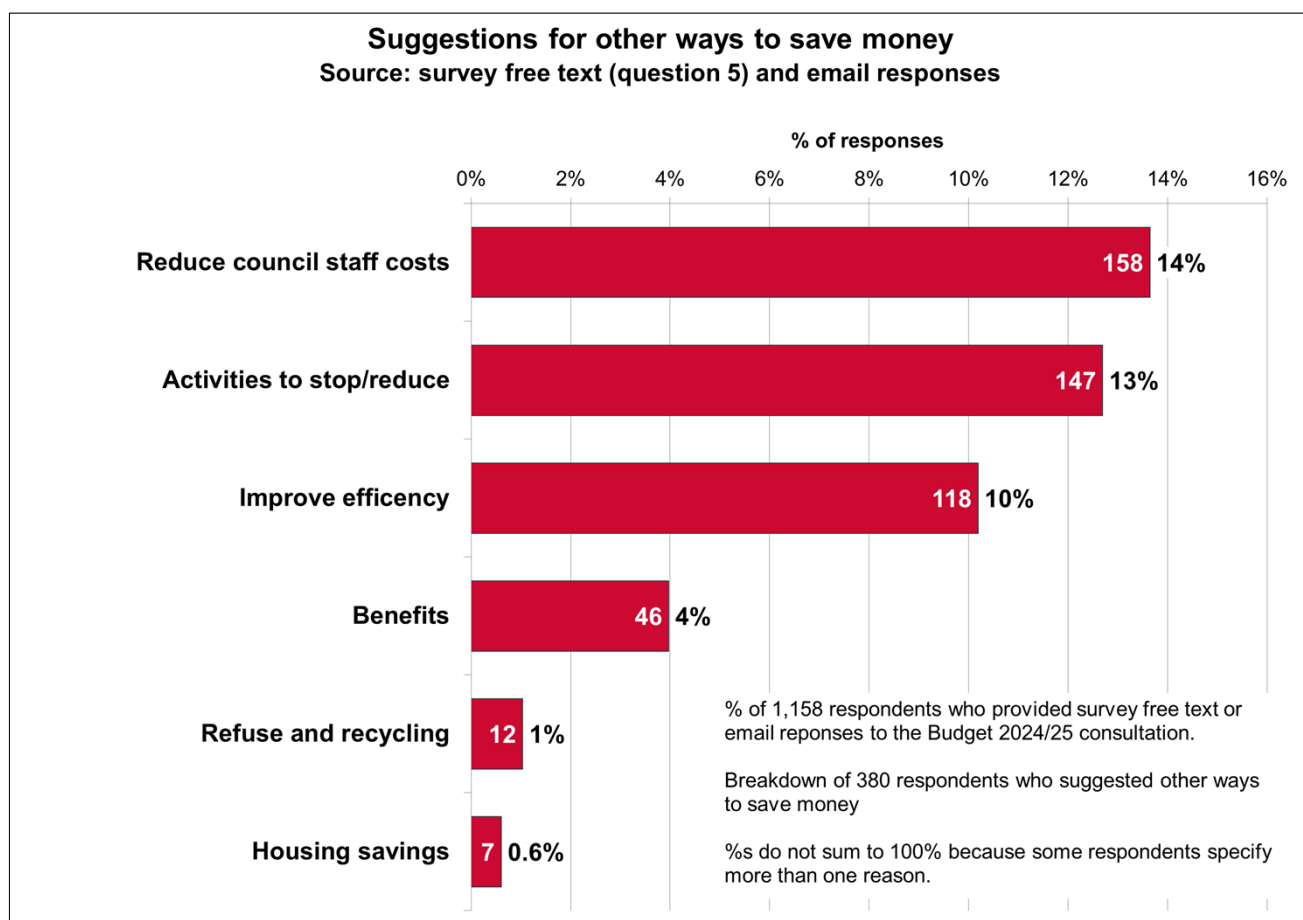
One person recommended the 'invest to save' ideas should include reviewing salaries of social care staff to make them competitive with other local authorities. They said this would avoid the costs of training social care staff, then losing them to higher paying local councils.

5.3 Other suggestions for ways to save money.

Of the 1,158 free text survey and email responses, 380 (33%) provided suggestions for other ways the council might save money (Figure 25). Of these:

- 158 (14% of 1,158 respondents) proposed ways the council should reduce staffing costs
- 147 (13%) recommended activities the council should stop or do less
- 118 (10%) advocated ways the council should improve efficiency
- 46 (4%) wanted changes to benefits to reduce costs
- 12 (1%) identified ways to reduce refuse and recycling costs
- 7 (0.6%) proposed housing-related ways to reduce costs.

Figure 25: Suggestions for other ways to save money.



5.3.1 Reduce staff costs

158 (14%) respondents suggested ways to reduce staffing costs.

- **Collaboration with other public sector and voluntary organisations** to share staff resources:
 - Collaborate with WECA and other authorities to avoid duplication of efforts and to pool resources and achieve cost savings
 - Explore sharing corporate back-office costs, like payroll, with the NHS
 - Work with the voluntary sector to provide services like children's homes
- **Staffing and restructuring:**
 - Recommendations to restructure BCC staffing to cut down on staffing levels and streamline departments save costs
 - Deliver more with in-house staff and pay less to consultants for better value. Other respondents suggested privatising services and allowing more market competition
 - Recommendation to achieve potential savings resulting from the end of an elected mayor and the City Office

- **Staff and councillor salaries and benefits**

- Reduce salaries of senior council officers and implement wage freezes
- Calls for a review of elected officials' salaries, expenses and 'bonuses'
- Concerns about perceived unnecessary expenses like overseas travel, conferences, and away days
- Reduce employer contributions to council staff pensions to be in line with the private sector
- Eliminate perceived staff perks such as free council employee parking
- Incentivise council staff to be more efficient, using bonuses proportional to either additional income generated or cost savings implemented.

5.3.2 Activities to stop or reduce

147 (13%) respondents identified activities which respondents thought should be stopped or reduced to save money. Comments included:

- **High profile, high-cost projects:** Projects that respondents mentioned repeatedly as not feasible, or poor value for money, are the Bristol Beacon, mass transit/underground, other major transport projects, Bristol Energy, and Harbourside redevelopment
- **Transport spending.** Respondents suggested:
 - Reduced spending on highways, roads, and "unnecessary" road layout changes. Respondents objected to what they see as constant construction, saying "the city is turning into a building site"
 - Stopping allocation of funds to bike lanes
 - Opposition to e-scooters and e-bikes, by respondents who consider them to be an unsafe menace
 - Re-evaluating the implementation of bus lanes
 - Fewer police mobile speed camera operations, especially in 20mph zones
- **Street lighting:** Switch off streetlights after midnight in residential areas
- **Housing:** Stop construction of additional student housing
- **Discontinue discretionary services,** including:
 - Subsidies to businesses
 - Grants to local charities
 - Cultural support, including causes like Pride
 - Stop neighbourhood free projects
 - Spending on aesthetic improvements
- **Climate initiatives**
 - Opposition to funding for carbon net zero plans by respondents who dismiss the concept or urgency of addressing the climate emergency.

5.3.3 Improve efficiency

The 118 (10%) respondents who suggested there is scope to run the council more efficiently identified the following themes.

- **Leadership and council decision-making**
 - Improve overall budgetary responsibility, with long-term budget decisions in preference to short-term fixes
 - Calls for the council to be more prudent in its decision-making and avoid unnecessary expenditures
 - Requests for more inclusive decision-making processes in full council meetings rather than committees
 - Concerns that money is mismanaged on major projects
 - Perception that senior management decisions negatively affect service quality
 - Accusations of lack of accountability and perceived corruption
- **Transparency concerns:**
 - A need for greater transparency about how Council Tax is used
 - Calls for increased public scrutiny, voluntary scrutiny panels, and accountability measures within the council
 - Ensure residents see tangible benefits of increasing Council Tax, to increase acceptance
 - A perceived focus on hiding negative news
- **Cost savings and efficiency suggestions**, including:
 - Generic calls to cut unnecessary spending and improve efficiency, in preference to service cuts or fee increases, which may affect essential services
 - Recommendations for a change in the council's culture to focus on key policies and services, avoid unnecessary consultations, and ensure value for money
 - Focus on delivering higher quality services at a faster pace
 - Review and potentially renegotiate contracts, particularly with a focus on road maintenance
 - Improve use of council spaces, to achieve cost savings
 - Suggestions to adopt technology and administrative process automation for cost savings and increased efficiency
 - Benchmark how other councils balance their budgets and spend their funds, and adopt best practice
- **Workforce efficiency**
 - Calls to increase employee accountability
 - Concerns about perceived declining expertise, made worse by poor staff pay
 - Incentivising staff based on performance for a more performance-driven approach.

5.3.4 Saving money through changes to benefits

46 (4%) advocated saving money through changes to benefits. Suggestions were:

- Reduce or remove the Council Tax Reduction Scheme
- Cost-saving measures:
 - Better/stricter screening of benefits applications
 - “Self-sufficiency” training for benefits recipients through volunteer programmes
 - Ensure that when recipients of food vouchers go on holiday, their food vouchers should go to the local food bank
- Emphasis on the availability of jobs and a call for the council to provide more support for people who are out of work to find employment
- Measures for specific types of recipients:
 - Opposition to providing benefits, social services, or housing to drug users
 - Regular drug testing for welfare recipients
 - Withdrawal of financial support and/or eviction for council tenants engaged in antisocial behaviour, current and/or prior criminal activities, or vandalism, with a proposal for a permanent blacklist
 - Stop benefits and/or support for “illegal” immigrants/refugee population who do not pay taxes
 - Benefits for asylum seekers should be the responsibility of the national government.

5.3.5 Changes to refuse and recycling.

12 (1%) suggested saving money through changes to refuse and recycling:

- **Efficiency:** Reassess the waste and recycling operation to make it more efficient
- **Recycling centres:** Reduce the hours that recycling centres are open
- **Less frequent household waste/recycling collections.** Specific suggestions included:
 - Cut recycling services (the respondent considers recycling to be non-essential saying it has “minimal environmental benefit compared to reducing and re-using”)
 - Reduce the frequency of household waste/recycling collections for suburban areas that have garages and can store their recycling
 - Cut out one week of waste and recycling collections over the Christmas and New Year period to save on Saturday working. The respondent notes that the gap between two recycling collections during this period is already 11 days for Friday collections, making it seemingly feasible for residents
- **Improve how waste collection staff clear up** the street as they move through areas.

5.3.6 Housing savings

7 (0.6%) suggested measures to increase housing supply and reduce dependence on council housing. Themes covered were:

- **Increase housing supply to reduce the costs of supported housing**
 - Build more social housing to reduce the costs of emergency accommodation
 - Increase building heights in city centre core and near stations and build new larger blocks of flats
 - Increase the height of student flat buildings elsewhere to free up family homes
 - Make it easier for older people to downsize allowing larger houses to be back on the market for young families
 - Increase the rental market in order to hold costs down, to make it easier for people to rent property
 - Better regulation of housing developers to ensure they deliver social housing and amenities as part of approved projects
- **Reduce dependency on the council for housing**
 - Permit and help asylum seekers to work and support themselves, so they do not require costly housing support while being unable to contribute.

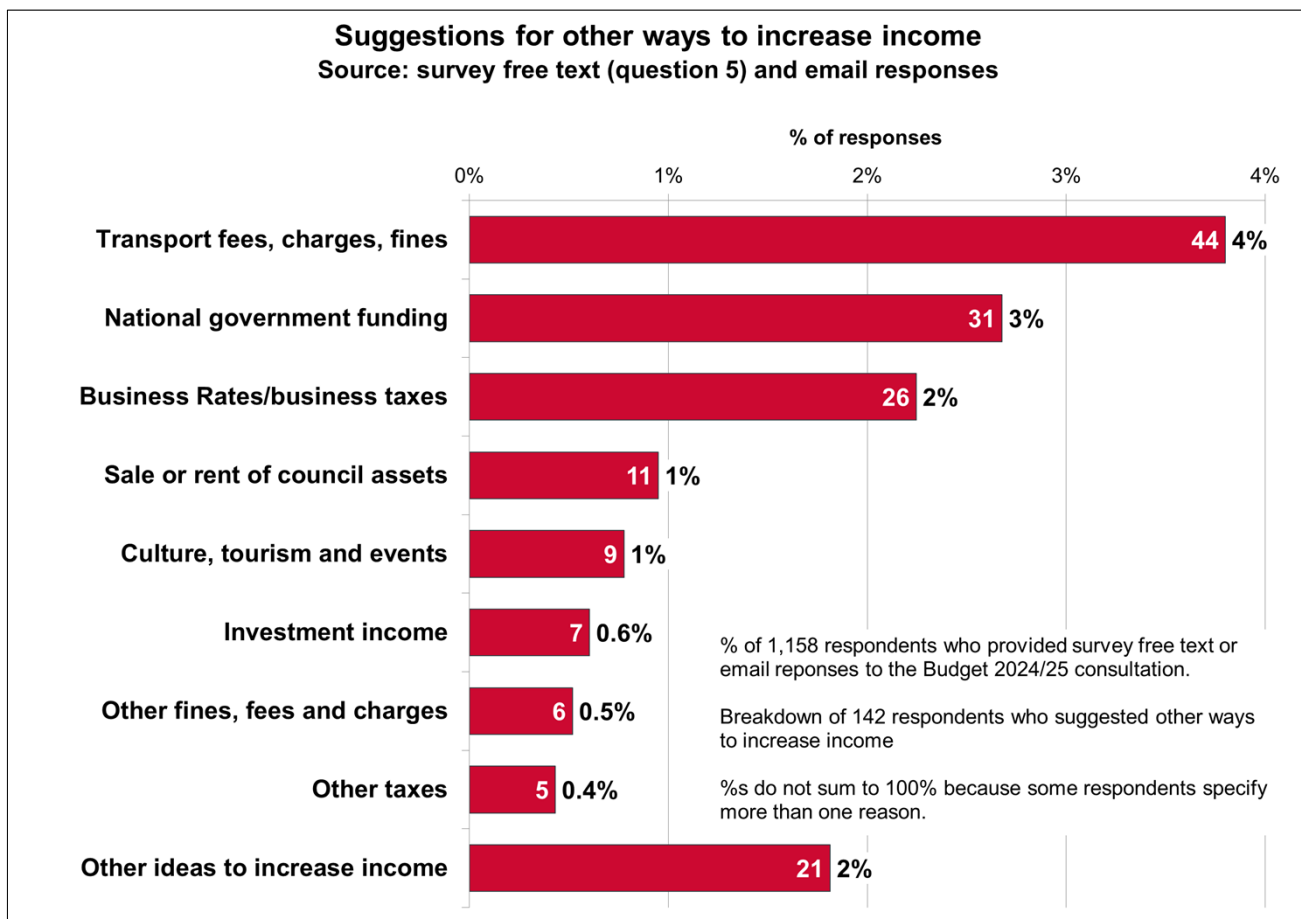
5.4 Suggestions for other ways to increase income.

5.4.1 Overview

Of the 1,158 free text survey and email responses, 142 (12%) provided suggestions for other ways the council might increase income (Figure 26). Of these:

- 44 (4%) recommended increasing revenue from transport fees, charges and fines
- 31 (3%) said national government should provide the funding needed by local authorities
- 26 (2%) favoured increasing Business Rates or other business taxes
- 11 (1%) recommended raising money through sale of council assets
- 9 (1%) suggested raising revenue from culture, tourism and events
- 7 (0.6%) advised investing to create a long-term revenue stream
- 6 (0.5%) proposed a variety of other fines, fees and charges
- 5 (0.4%) suggested ways to raise income via other taxes
- 21 (2%) provided other ideas to increase income.

Figure 26: Other suggestions for ways to increase income



A further breakdown of these comments is provided below. All percentages are percentages of the 1,158 free text survey and email responses.

5.4.2 Transport taxes, charges and fines

44 (4%) mentioned use of taxes, charges, fines and enforcement related to transport. Of these, 34 (3%) suggested specific ideas for using transport fees, fines and enforcement to increase the council's income. 10 (1%) expressed opposition to transport charges, with nine criticising the Clean Air Zone, one opposed to increases in parking charges in the Controlled Parking Zone (CPZ), and one critical of increasing Residents' Parking permit charges.

Ideas in favour of using transport taxes, charges and fines to increase council revenue were as follows.

- **Increase road tax.** Specific comments included:
 - change road tax to a road transit tax with all wheeled transport paying for use of the roads
 - Increase tax on Sports Utility Vehicles (SUVs) – tax based on vehicle weight
- **Clean Air zone:** Extend the Clean Air Zone (also referred to as 'low emission zone') to cover the entire Bristol City Council area and charge for entry
- **Introduce a congestion charge**

- **Parking revenue (charges and fines):**
 - Introduce a workplace parking levy to fund public transport improvements
 - Increase parking charges, including in council-managed car parks
 - Increase parking enforcement (and employ more enforcement officers). There was a view expressed by several respondents that there is not enough parking enforcement in parts of central Bristol, specifically Old Market, and that increasing enforcement is needed to reduce nuisance and could also increase revenue
 - Increase minimum parking fines and charge for illegally parked vehicles that need to be towed away. Targeting match-day illegal parking was suggested.
 - Extend / expand residents' parking schemes and increase the cost of permits
 - A request for clarity on revenue raised on residential parking schemes and why resident's parking has not been rolled out equitably in areas (the examples of St Andrews and Redland were given) which border existing schemes
 - Introduce fines for parking on pavements. Issues of delivery vehicles parking on, and damaging footways, and vehicles parking on, and blocking, pavements or overhanging driveways in residential areas were mentioned
 - Charge for disabled parking bays including annual renewals. (The respondent thought these are being abused)
 - Charge van dwellers for parking on public roads and prevent people parking large campervans on narrow residential streets for long periods
- **Vehicle access charges**
 - Charge online shopping delivery couriers for access to the city
- **Electric vehicle (EV) charging infrastructure**
 - Increase spending on EV charging infrastructure. It was suggested that on-street EV chargers could provide significant income for the council whilst helping to support the aims of the Clean Air Zone
- **Cyclists:** fine cyclists for breaking Highway Code

Of the 10 respondents who were critical of the Clean Air Zone (CAZ) and parking charges:

- **Clean air zone:** nine respondents variously saw the CAZ as a waste of money, a non-transparent way of raising income, ineffective at improving air quality, an 'unfair tax', and having a negative impact on the viability of the city centre. The section of the CAZ across the Cumberland Basin was specifically criticised
- **Increase in parking permits costs in the CPZ.** This was criticised as unjustified and unfair for people living in the city centre during a cost-of-living crisis.

5.4.3 National government funding

31 (3%) respondents recommended that more of the funding for local authorities should be raised nationally, instead of from citizens in each local authority. The following themes were covered. Comments were:

- **Central government responsibility:** There was a prevailing sentiment that central government was responsible for funding shortfalls for local authorities and cuts to local services. Respondents stated that central government should restore adequate funding to local councils to deliver essential services and reverse austerity measures
- **Fund local government using nationally raised taxes.** Specific suggestions included:
 - Fund services through progressive general taxation at a national level, including income tax and wealth taxes, with a higher tax take from the highest earners
 - Fund local government through VAT
 - Redirect the Treasury's planned tax cuts to local councils
- **Grants:** Increase grants from central government to local authorities.

5.4.4 Business rates and increases to business taxes

26 (2%) respondents suggested increasing Business Rates and other business taxes as a way to increase council income. These comments included suggestions for changes to business rate relief. Comments included:

- **Balance of public versus business taxation:**
 - Increase business taxes instead of individual taxes
 - Businesses need to be taxed more, not the public
 - Compare business taxation rates with other major European cities
 - Stop subsidising non-contributing businesses
 - Increase charges for food shops selling alcohol
 - Businesses should take responsibility for driving positive changes
- **Other comments about Business Rates**
 - Increase Business Rates, particularly for larger businesses such as law and accounting firms, and hotels
 - Implement a sliding scale for business rate relief
 - Review and potentially reduce 100% relief for small businesses
- **Tax poor environmental responsibility:**
 - Tax polluting and unsustainable businesses
 - Fine or tax delivery companies for pavement damage.

5.4.5 Sale or renting of council assets

11 (1%) had recommendations for increasing the council's income through sale or renting out council assets. The themes were:

- Emphasis on the importance of efficiently managing and monetising existing council assets to meet financial needs rather than resorting to raising council tax directly
- Optimise use of council buildings by evaluating office needs and renting out spaces
- Sell unused and underutilised council properties, including BCC estate assets and vacant land. Use the income to fund essential services
- Consider selling expensive housing in high value areas and relocating to cheaper areas
- Explore selling or co-developing unused land and buildings for commercial ventures
- Sell the Bristol Beacon or seek sponsorship/investment to recoup some of the costs of redevelopment.

5.4.6 Culture, tourism and events

9 (1%) suggested the council could raise revenue from culture, tourism and events, including:

- Charging more for cultural services
- permitting or organising public events, including festivals, county fairs, camping, outdoor discos, sports events, car boot sales
- Encouraging tourism.

5.4.7 Investment income

7 (0.6%) respondents recommended that the council develops investment strategies to create a long-term funding stream to support revenue budgets. Ideas included:

- **Build more homes for rent.** There was specific mention of building high quality council homes on brownfield sites by allowing councils to fund via private debt, with priority given to key workers. The respondent anticipates this would generate money in the long term
- **Housing renovation:** Buying up and renovating Bristol's run-down private housing stock to improve energy efficiency and then sell at a profit or rent
- **Environmental investments,** including enabling citizens to invest in projects which tackle the climate and ecological emergencies. It was suggested that this could help the council meet its goals as well as increasing revenue.

5.4.8 Other fines, fees and charges.

6 (0.5%) respondents suggested other fines, fees and charges which could raise income.

- **Fines**

- Prosecution of fly tippers and harsher fines for littering
- Issue fines to utility companies cutting fibre connections to businesses
- Issue fines to 'unscrupulous' property developers, particularly those who destroy buildings by fires or leave buildings to become derelict
- Charge people for missed doctor's appointments

- **Fees and charges**

- Make a small charge for employed people to use libraries

5.4.9 Other taxes

5 (0.4%) respondents suggested increasing income from other taxes. These comments tended to be accompanied by frustration at the prospect of a significant increase in individual contributions. Suggestions for other taxes were:

- A tourist tax or leisure tax
- A tax on banks
- Higher local taxes on landlords
- A tax on polluting/unsustainable businesses
- Local wealth taxes

5.4.10 Other ideas to increase income:

21 (2%) had other recommendations for increasing the council's income. These were:

- **Charge higher rent** for council homes.
- **Introduce Short Term Let Licences** to curb the number of Airbnbs in the city and generate additional council revenue
- **Development gain:** Be more rigorous in levying Community Infrastructure Levy (CIL) on developers
- **Support refugees:** there are highly educated people looking to contribute to our society and more support here would see a noticeably benefit to the Bristol local economy and public services as a result
- **Donations:** donated items to the council could be sold online
- **Attract sponsorship**
- **A Bristol postcode lottery** with profits going to Bristol City Council
- **Legalise cannabis:** the respondent suggested the council could raise income by legalising cannabis and opening cannabis cafes.

5.5 Suggestions for other priorities the council should fund

53 (5%) had recommendations for projects in which the council should invest additional funds. These were commonly suggested as services to preserve when budgets were at risk, or things that need improving in the context of comments about support for or opposition to Council Tax increases:

- **Council housing and affordable housing**
 - Allocate more funds to affordable housing developments to meet the needs of a growing population
 - Increase the rental market to hold costs down and make it easier for people to rent
- **Adult and children's social care**
 - Children's services, parenting support, and parent mental health
 - Special Educational Needs and Disability (SEND)
 - Good quality care homes
 - Support vulnerable people, including those facing homelessness and drug addiction
 - Encourage local communities to provide more/better mental health support
 - More youth clubs
- **Transport improvement:**
 - Road and highway maintenance. Specific concerns mentioned were repeated flooding in Easton and uneven surface on the Bristol-Bath cycle path
 - Better public transport and cycling infrastructure
 - Increase spending on Electric Vehicle charging infrastructure
- **Environmental initiatives:**
 - Tree planting and other environmental projects to reduce air pollution
- **Public facilities and services that affect all citizens:**
 - Address footpaths, streetlights, drains, litter, and weeds
 - Increase the number of public toilets
 - Prioritise waste/recycling programs
- **Safety and law enforcement:**
 - Increase police presence
- **Education:**
 - Invest in education, schools and specifically address dyslexia-related issues
 - Boost the economy by helping young adults be more employable
 - Focus on public-private partnerships in the education sector
- **Arts and cultural funding:**
 - Better funding for the arts, citing The Watershed as an example.

5.6 Other comments and suggestions

19 (2%) respondents offered the following other comments and suggestions.

- **Disparities in levels of council services in different areas of Bristol.** It was perceived that that some areas receive more advantages while others in need of funding do not
- **HMO licensing fees:** It was suggested that licensing fees could be increased for houses in multiple occupation (HMO), particularly in overpopulated areas like Southmead Road. The respondent questioned the lack of consideration for an Article 4 Direction in Southmead and the absence of an additional licensing scheme
- **Recommendations without knowledge of spending plans:** Some respondents expressed difficulty making recommendations without knowing how the increased money will be spent
- **Concerns about perceived bias and broadness of the phrase “adult social care”:** The respondent criticised the survey as potentially biased, stating that adult social care is not defined only as aid for the elderly and disabled but as a broad safety net that has the ability to be abused. They suggest that categorising all welfare systems under one umbrella is disingenuous
- **Begging and addiction:** A respondent suggests making giving money to beggars illegal to discourage begging for drugs, and recommends donations of food and clothing instead.
- **Other comments** covered a range of topics, including dissatisfaction with the planning department; lack of bus services in Whitchurch; concerns about homelessness and addiction; and a specific request for detailed information on education services expenditure.

5.7 Comments about the consultation survey

24 (2%) respondents commented on the consultation process. Comments covered the following issues.

- **Positive comments** about the level of information provided and transparency in involving citizens in helping to shape the budget
- **Insufficient information:** Request for more information to be provided in the survey, including:
 - Information about other precepts (fire service, police) to be included, to compare to cost of Social Care Precept
 - Information about whether Business Rates can be increased as an alternative to Council Tax
 - Information about restructuring to reduce BCC staffing and reduce ward councillor and Cabinet member expenses
 - Information about possible savings coming from the end of an elected Mayor and the City Office

- Information about how effective budget spending has been; not just information about which services the money is spent on
- Information on the total monthly costs to an individual of each combination of Council Tax and Social Care Precept options
- Request for details of how increased payments to private landlords could be considered a saving
- Concern that some of the images may be intended to emotionally manipulate respondents to agree to higher Council Tax or Social Care Precept
- **Confusing information**
 - Confusion about the financial amounts needed and how much each Council Tax and Social Care Precept would raise
 - Difficulty understanding the key issues because of the amount of information provided
- **Accessibility and involving all communities:**
 - Concerns regarding the accessibility of the survey
 - Request for clearer communication in plain English, with concern that the amount and complexity of the information in the consultation may exclude less-heard groups
 - Worries that the survey may not reach certain demographics
 - Suggestions made to engage a wider community through local institutions such as libraries, community centres, and religious centres
- **Scepticism that the consultation would influence decision-making.**
 - Scepticism that the decisions about the budget would reflect the preferences expressed in the consultation feedback. Respondents expressed hope that the council would act on the survey feedback
 - Concerns expressed about the council's responsiveness, with references to past instances where respondents said feedback and petitions were not implemented
 - Call for transparency, with requests to publish survey results against actual decisions to demonstrate how the consultation has influenced decisions
- **Objection to being consulted.**
 - Requests not to be contacted again about council consultations
 - Requests that the council makes its own decisions instead of asking citizens.

6 Impact of the proposals because of protected characteristics

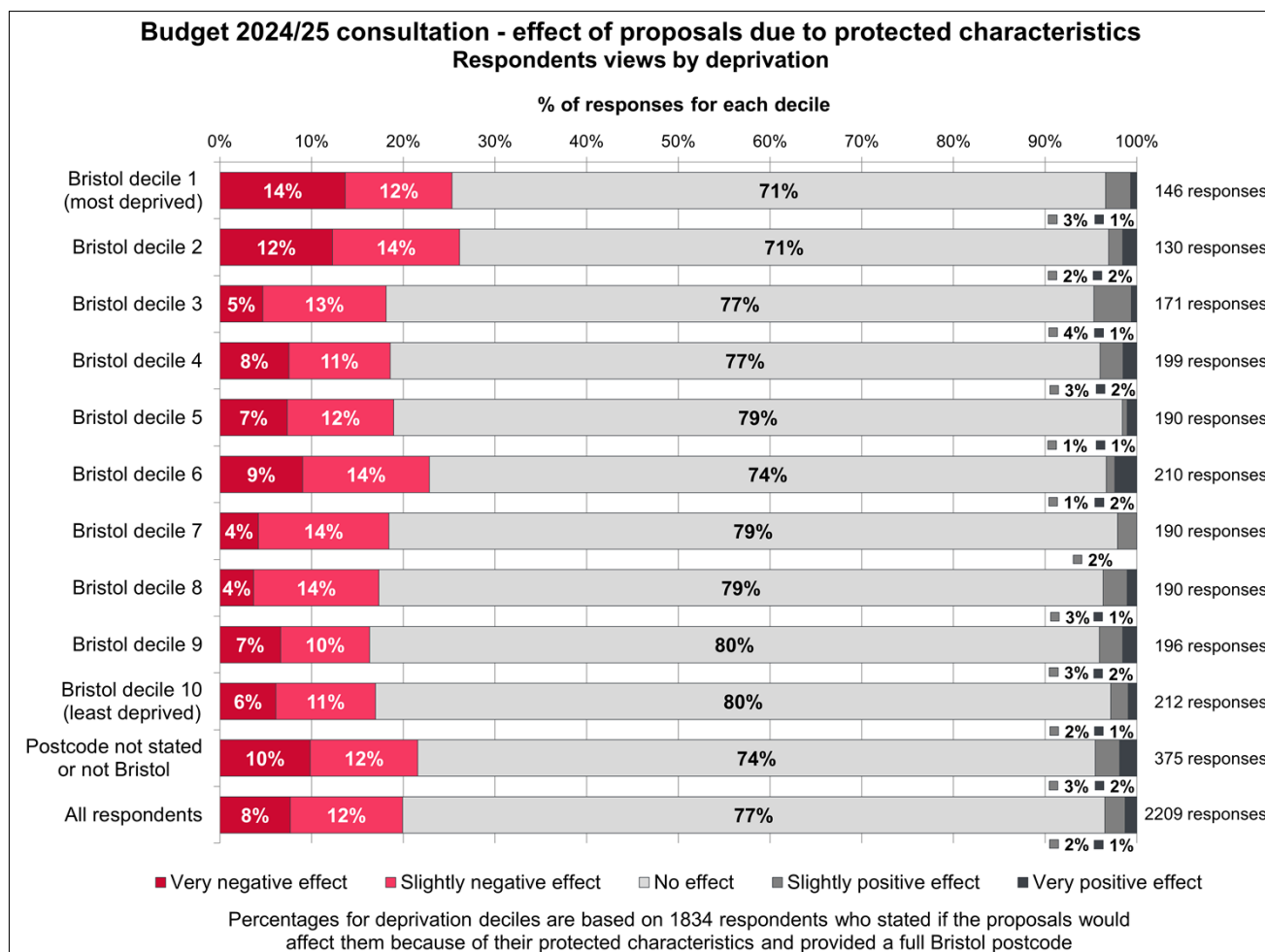
6.1 Scale of effects

Respondents were asked what effect, if any, the proposals would have on them because of their protected characteristics²⁸. Of the 2,547 respondents to the survey, 2,209 (87%) answered the question. Of these:

- 170 (8%) said the proposals would have a very negative effect
- 270 (12%) said the proposals would have a slightly negative effect
- 1,692 (77%) said the proposals would have no effect
- 49 (2%) said the proposals would have a slightly positive effect
- 28 (1%) said the proposals would have a very positive effect.

Answers to this question were also compared for respondents in areas with different levels of deprivation, to check for any significant differences in potential effects (Figure 27)

Figure 27: Effect by deprivation of the proposals because of protected characteristics



²⁸ The protected characteristics defined in the Equality Act 2010 are age; disability; race including colour; nationality, ethnic or national origin; religion or belief; sex; gender reassignment; sexual orientation; being married or in a civil partnership; being pregnant or on maternity leave.

Figure 27 shows the percentage of respondents from each deprivation decile who stated the extent of positive or negative effects on them because of their protected characteristics. This is based on the 1,834 Bristol respondents who stated the impact of the proposals and provided a full postcode. Figure 27 also shows the views of 375 people who did not provide a postcode or gave a non-Bristol postcode, and the aggregate views of all respondents.

Figure 27 shows that the proportion of respondents who think the proposals would have a very negative or slightly negative effect because of their protected characteristics is higher in the most deprived 20% of the city (deciles 1 and 2) than other areas. In deciles 1 and 2, 26% say the proposals would have a very negative or slightly negative effect. Decile 6 also has a higher-than-average proportion (23%) who anticipate very or slightly negative effects. For other deciles, the proportion who say the proposals would have a slightly negative or very negative effect ranges from 16% in decile 9 to 19% in deciles 4 and 5.

In every decile, fewer people anticipate very positive or slightly positive effects than negative effects. The proportion of respondents who think the proposals would have a very positive or slightly positive effect because of their protected characteristics ranges from 2% in deciles 5 and 7 to 5% in decile 3. There is no clear pattern in views about positive effects between areas of high and low deprivation.

Note that percentages in Figure 27 are shown to the nearest whole number and may appear not to add up to 100% due to rounding. For example, the percentages for postcode not stated (10%, 12%, 74%, 3%, 2%) appear to add up to 101%. This may similarly affect totals for 'very negative effect' and 'slightly negative effect' in the text.

6.2 Reasons why the proposals would affect people because of protected characteristics

Respondents were also asked to explain how they believe the proposals would have an impact on themselves or others. The 217 respondents who provided a free text response, highlighted the following impacts.

Financial difficulty and impact of rising costs

30% of the 217 respondents to the question described financial difficulty and the impact of rising costs. These included:

- Concerns about increased living costs and inability to manage additional expenses, especially Council Tax rises. This was a concern particularly for low-income households
- Specific groups, including retirees, young people, and those on fixed incomes, highlighted the strain of rising expenses. For example:
 - Additional Council Tax rises would be particularly challenging for retired individuals who have limited income, especially due to fixed pension rates
 - Issues of financial strain, difficulty in affording housing, and saving for the future were highlighted, particularly for younger individuals
- Criticism directed towards the proposals, with calls for support for struggling families and scepticism about the benefits derived from increased taxes.

Concerns about the impact on specific demographic groups

18% of the 217 respondents to the question cited concerns about impacts on specific demographic groups. These included:

- Challenges highlighted for specific groups - including single parents, carers, those on maternity leave, women, LGBT+ individuals, foreign nationals, single occupants, and those on limited benefits facing financial difficulties - indicating potential negative impacts of increased taxes on their budgets and lives
- Concerns raised by single parents, disabled individuals, and those on fixed pensions about their vulnerability to cost increases in general
- Concerns about financial impacts due to individual circumstances such as age, employment, and fixed income, indicating potential disproportionate burdens
- Criticisms related to gender disparities, especially concerning pay gaps and the differential treatment of households based on marital or partnership status.

Concerns about the disproportionate impacts on vulnerable and minority groups

17% of the 217 respondents to the question stated their concerns about disproportionate impacts on vulnerable and minority groups. These included:

- Concerns raised by disabled individuals and carers regarding increased living expenses, financial strain, and limitations in accessing support services. Issues highlighted include:
 - difficulties in managing everyday costs, transportation expenses, and energy needs due to disabilities
 - Challenges in accessing specialised support, private school costs
 - disparities in societal assistance despite paying taxes
- Calls for increased funding and improvements in provisions for Special Educational Needs (SEN) and social care for disabled individuals and families
- Concerns about how protected characteristics might lead to indirect discrimination
- Financial impact on ethnic minorities, women, and LGBTQ+ individuals due to existing gender and ethnicity pay gaps.

Concerns about council governance, decisions and the consultation

12% of the 217 respondents to the question mentioned concerns about council governance, decisions and the consultation. These included:

- Criticisms about the distribution of funds, perceived inefficiencies in council services, perceived mis-spending of money, and concerns about governance competency
- Criticism of high Council Tax rates – which were attributed to inefficient council services - and the impact this has on the personal funds of hardworking individuals
- Opposition to tax increases

- Scepticism regarding the consultation process and distrust towards proposed policies and their implementation
- Frustration over a perceived lack of responsiveness to community needs and preferences
- Lack of trust in the decision-making process
- Accusations of enabling victimisation and catering to minority groups
- Calls for policies which represent the majority's interests and concerns.

Concerns about the impact of service cuts on the community and public services

9% of the 217 respondents to the question raised concerns about the impact of cuts to services on the community and public services, and their priorities for funding services. These included:

- Respondents emphasising the importance of social care for older people within the community
- Concerns about infrastructure issues like uneven pavements, potholes, and parking hindrances which disproportionately affect those with mobility issues
- Anticipation of rising living expenses and declining service quality
- Dependence on public services such as the NHS for health needs
- Worries about potential service cuts affecting maternity leave experiences, libraries, and community activities
- Willingness to pay for better local authority services despite limited income
- Recognition of the need for increased funding in social services and education but anticipating impacts on personal care availability.

Accessibility, equality and fairness

6% of respondents to the question cited issues regarding accessibility, equality and fairness. These included:

- Criticism of equality measures which they consider meritless and causing division and isolation
- Questioning the council's focus on protected characteristics and whether the Equality Act is of wider concern to majority of citizens
- Criticism of positive discrimination and targeted campaigns, including scepticism of criteria for social support, alleging favouritism
- Advocacy for gender-neutral cost considerations, prioritising education
- Acknowledgment of negative impacts on various lower-income groups: families, people on maternity leave, disabled individuals, elderly people, and students
- Linking equality to inclusivity and how this can benefit citizens by creating a hospitable environment
- Concerns about unequal treatment based on marital status and the financial implications of different household structures.

Concerns about the impact on health and wellbeing

3% of respondents to the question stated concerns about the impact of higher costs and reduced services on health and wellbeing. These included:

- The impact of increased costs on mental health and anxiety about financial stability
- Impact of reduced disposable income on maintaining health and wellbeing, especially for those with disabilities or health conditions
- Significant decline in wellbeing services over the last few years
- Concerns about potential charges or reduced care for those with mental health conditions
- Impact on mental health of cutting services like swimming pools and libraries.

Uncertain impact

3% of respondents to the question said they were unsure about the impact of the proposals.

No impact

2% of respondents to the question re-iterated that the proposals would have no impact on them because of their protected characteristics.

7 How will this report be used?

The consultation feedback summarised in this report has been taken into consideration by officers when developing final proposals for the 2024/25 budget, including the level of Council Tax and Social Care Precept and proposals to save money and generate income.

The final proposals are included in a separate report which, together with this consultation report, will be considered by Cabinet on 23 January 2024.

Full Council will take into consideration this consultation report and responses in making its decisions about the level of Council Tax and Social Care Precept and how much money the council will be able to spend on each service area, as part of the 2024/25 budget. These decisions will be taken at the Full Council meeting on 20 February 2024.

How can I keep track?

You can find the latest consultation and engagement surveys online on the council's Consultation and Engagement Hub (www.ask.bristol.gov.uk). You can also sign up to receive automated email notifications about consultations and engagement at www.bristol.gov.uk/askbristolnewsletter

Decisions related to the proposals in this consultation will be made publicly at the Full Council meeting on 20 February 2024.

You can find forthcoming meetings and their agendas at democracy.bristol.gov.uk.

Any decisions made by Full Council and Cabinet will also be shared at democracy.bristol.gov.uk

Equality Impact Assessment [version 2.12]



Title: Cumulative Equality Impact Assessment of proposed budget savings 2024/25 – 2028/29	
<input checked="" type="checkbox"/> Budget proposal	<input checked="" type="checkbox"/> Changing
Directorate: Crosscutting	Lead Officer name: Denise Murray
Service Area: All	Lead Officer role: Director of Finance (Chief Finance Officer & S151 Officer)

Step 1: What do we want to do?

The purpose of an Equality Impact Assessment is to assist decision makers in understanding the impact of proposals as part of their duties under the Equality Act 2010. Detailed guidance to support completion can be found here [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#).

This assessment should be started at the beginning of the process by someone with a good knowledge of the proposal and service area, and sufficient influence over the proposal. It is good practice to take a team approach to completing the equality impact assessment. Please contact the [Equality and Inclusion Team](#) early for advice and feedback.

1.1 What are the aims and objectives/purpose of this proposal?

Briefly explain the purpose of the proposal and why it is needed. Describe who it is aimed at and the intended aims / outcomes. Where known also summarise the key actions you plan to undertake. Please use plain English, avoiding jargon and acronyms. Equality Impact Assessments are viewed by a wide range of people including decision-makers and the wider public.

Budget context

Every year, Bristol City Council must agree an annual budget which balances the money we spend with the money we are expecting to receive. Councils across the country are continuing to face financial challenges, reflecting the economic context, including the significant inflationary environment, combined with continuing demand pressures and limitations on government funding. Based on our current forecasts, we face a funding gap over the next five years (to 2028/29) of £32.2 million. This is in addition to the £17.7 million of savings and efficiencies proposals for 2024-2028 outlined in the 2023/24 budget and assumed delivery of 2023/24 savings in the current year.

The council is funded via different streams including council tax (24%), business rates (15%), income from service users (19%), grants (38%), contributions from other organisations (3%) and investment income (less than 1%). The Council has defined statutory responsibilities, but deliver against a far broader agenda, providing universal services benefiting the whole community, and targeted services aimed at individuals, communities with particular needs, and businesses – administered by our workforce, city partners, stakeholder organisations and commissioned services. By far the largest share of the council's budget is spent on social care services, with over 70 per cent of our core service spending on providing support to those who need additional help and the most vulnerable in our city. We are seeing an increase in demand for all of our services which is likely due to a cost-of-living crisis, a rise of inflation nationally and a growth in population.

To address these challenges, we must look again across all of our services to find where we can do things differently to reduce costs, be more efficient in how we do things and, in some cases, stop doing some things entirely. As part of this and reflecting the breadth of savings already within the previous budget, during 2023/24 we have identified four transformation programmes designed to make significant changes to the way we work: Our Families (children and education), Adult Social Care, temporary accommodation and property.

The [Medium Term Financial Plan](#) underpins the Council's financial planning process and outlines the approach we will take to meet the challenges presented by focusing primarily on delivering efficiencies and service re-design programmes.

The Budget Equality Impact and Cumulative Impact Assessment process

Each of the proposed savings has an associated equalities impact assessment that analyses the impact of the proposal on different protected characteristics and community groups and identifies any potential mitigations. Assessing the impact of savings proposals on different groups allows decision makers to have due regard to any likely disproportionate or negative impact for citizens, service users or employees on the basis of their protected and other relevant characteristics. This relates to the time at which the budget is approved and on an ongoing basis as propositions are further developed. Even when we plan to consult in more detail on specific service delivery proposals at a later time, we must make sure that any proposals that are likely to affect future services are informed by sufficient consultation and proper analysis.

This Cumulative assessment looks at the potential collective equality impacts of all the proposed savings and key budget decisions taken together as a whole to identify compound issues or disparities, and what we can do to mitigate them.

Decision making

The recommendations regarding the budget proposals are made by the Cabinet to Full Council, where the budget is then approved. During the development of budget proposals, officers and Cabinet members have been mindful of the potential impacts that any changes could have on key communities and on the city as a whole, and for several savings proposals there has already been a comprehensive equality impact assessment developed throughout existing projects which has now been updated.

Our Approach

A key part of our purpose as a local authority is to support those at risk or in need, and the majority of our revenue budgets are spent on services for people. Therefore, any change to the costs of delivering our services or our funding, has potential for impact and we have taken into consideration the issue of both direct and indirect impacts on individuals and groups of people when working to deliver a set of proposed budget reductions. It is also important to recognise that although the proposed level of reduction is significant, we will still be spending or directing the spend of significant sums across the city to achieve our priorities.

Our [Corporate Strategy](#) sets out how we work with other service providers and organisations and how we are planning to meet the challenges of a growing and ageing population, increased demand for care services and make sure people have the services they need, regardless of background.

Our [Equity and Inclusion strategic framework](#) sets our vision, recognising the contributions that people from different backgrounds make, actively tackling inequality and fostering good relationships across our communities. As well as our firm commitment to the Public Sector Equality Duty our aspirations go

further to include people in care, refugees and migrants, people with caring responsibilities and the inequality resulting from socio-economic disadvantage.

Our aim is to minimise direct and indirect impacts on our communities in this budget, specifically communities with protected characteristics and multiple characteristics, people living in deprivation, and those with other characteristics such as being care experienced. Where impacts are probable or likely, our aim is to mitigate against these where we can.

In building our approach to these budget reductions, we have first prioritised savings in areas which have the minimum direct impact on people and been clear how we will reshape the ongoing investment to address key areas of work. In this context we have also looked at wider measures which have enabled us to maintain many of our services targeted towards those who may be more vulnerable in our city.

1.2 Who will the proposal have the potential to affect?

<input checked="" type="checkbox"/> Bristol City Council workforce	<input checked="" type="checkbox"/> Service users	<input checked="" type="checkbox"/> The wider community
<input checked="" type="checkbox"/> Commissioned services	<input checked="" type="checkbox"/> City partners / Stakeholder organisations	
Additional comments:		

1.3 Will the proposal have an equality impact?

Could the proposal affect access levels of representation or participation in a service, or does it have the potential to change e.g. quality of life: health, education, or standard of living etc.?

If 'No' explain why you are sure there will be no equality impact, then skip steps 2-4 and request review by Equality and Inclusion Team.

If 'Yes' complete the rest of this assessment, or if you plan to complete the assessment at a later stage please state this clearly here and request review by the Equality and Inclusion Team.

<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	[please select]
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Step 2: What information do we have?

2.1 What data or evidence is there which tells us who is, or could be affected?

Please use this section to demonstrate an understanding of who could be affected by the proposal. Include general population data where appropriate, and information about people who will be affected with particular reference to protected and other relevant characteristics: [How we measure equality and diversity \(bristol.gov.uk\)](https://www.bristol.gov.uk/equality-diversity)

Use one row for each evidence source and say which characteristic(s) it relates to. You can include a mix of qualitative and quantitative data e.g. from national or local research, available data or previous consultations and engagement activities.

Outline whether there is any over or under representation of equality groups within relevant services - don't forget to benchmark to the local population where appropriate. Links to available data and reports are here : [Statistics and census information \(bristol.gov.uk\)](https://www.bristol.gov.uk/statistics), [Bristol Key Facts November 2023](https://www.bristol.gov.uk/bristol-key-facts); [Quality of life in Bristol](https://www.bristol.gov.uk/quality-of-life); [Census 2021 \(bristol.gov.uk\)](https://www.bristol.gov.uk/census-2021); [Ward profile data \(bristol.gov.uk\)](https://www.bristol.gov.uk/ward-profile); [Open Data Bristol](https://www.bristol.gov.uk/open-data), ; [Joint Strategic Needs Assessment \(JSNA\)](https://www.bristol.gov.uk/jsna);

For workforce / management of change proposals you will need to look at the diversity of the affected teams using available evidence such as [HR Analytics: Power BI Reports \(sharepoint.com\)](https://www.bristol.gov.uk/hr-analytics) which shows the diversity profile of

council teams and service areas. Identify any over or under-representation compared with Bristol economically active citizens for different characteristics. Additional sources of useful workforce evidence include the [Employee Staff Survey Report](#) and [Stress Risk Assessment](#)

Data / Evidence Source [Include a reference where known]	Summary of what this tells us
Census Data 2021	<p>Key headlines from 2021 census data on Bristol were:</p> <ul style="list-style-type: none"> • 49.6% of the overall population were men and 50.4% were women. • 18.8% of usual residents were born outside of the UK • 17.2% reported a Health issue or disability. The average across England and Wales is 17.5%. • There were 287+ ethnic groups recorded with Somali's being the largest ethnic minority with a population of almost 9,200 (1.9%) • There were 3,220 people identified as trans • 51.4% reported no religion, 32.2% reported Christian and 6.7% reported that they were Muslim
<p>Population of Bristol</p> <p>Population Profile: Disabled population</p> <p>Population Profile: Somali population</p> <p>Population Profile: Religion</p> <p>Population Profile: Ethnic group</p>	<p>The population of Bristol was estimated to be 479,000 people at the end of June 2022. Bristol is one of the 11 UK Core Cities, the largest city in the Southwest and the 8th largest city in England and Wales outside of London. Bristol was the second fastest growing of all the Core Cities in England and Wales over the last 10 years (2012 to 2022).</p> <p><u>Disabled population</u></p> <ul style="list-style-type: none"> • More than 81,000 (17.2%) people in Bristol have long-term physical or mental health conditions or illnesses whose day-to-day activities were limited • More than a quarter (27%) of the 'White Gypsy or Irish Traveller' population said they had a long-term physical or mental health issue or disability that affected their daily lives - 10 percentage points more than the Bristol average (17%) • Of all the carers in Bristol, almost a third (30%) were disabled themselves - this compares to just 17% of the population who do not provide unpaid carer to others <p><u>Somali population</u></p> <ul style="list-style-type: none"> • In 2021 more than half (52%) of Somalis living in Bristol were aged under 20 (Bristol total population 23% aged under 20) • More than half of the Somali population live in Barton Hill (23%), Upper Easton (11%), St Pauls (10%) or Temple Meads (10%) <p><u>Religion population</u></p> <ul style="list-style-type: none"> • More than a third (36%) of all Jewish people of working age were economically inactive students compared to just 12% in the population as a whole

	<ul style="list-style-type: none"> • Hindus have the highest levels of qualification - 62% with a degree or higher • Half of all Muslims (50%) live in socially rented accommodation - 31 percentage points higher than the overall population (19%) <p><u>Ethnic group population</u></p> <ul style="list-style-type: none"> • There are now more than 287 different ethnic groups in the city, more than 185 countries of birth represented, at least 45 religions and more than 90 languages spoken by people living in Bristol. • The proportion of the population who are not 'White British' has increased over the last two decades from 12% in 2001 to 28% in 2021. 																
Ward profile data	<p>The ward profiles provide a range of datasets including population, life expectancy, Quality of Life, Equalities characteristics, health and education disparities for each of Bristol's electoral wards.</p>																
Deprivation in Bristol	<p>Bristol has 41 Lower layer Super Output Areas (LSOA's) in the most deprived 10% in England for Multiple Deprivation (one less than in 2015), including 3 LSOAs in the most deprived 1% in England (3 less than in 2015).</p> <p>The 10 most deprived neighbourhoods in Bristol are all in the South Bristol areas of Hartcliffe, Whitchurch Park and Knowle West. At ward level, the greatest levels of deprivation in Bristol are in the wards of Hartcliffe & Withywood, Lawrence Hill and Filwood, the same as identified in 2015.</p>																
Bristol Quality of Life survey 2022-23	<p>The Bristol Quality of Life survey is an annual, residents survey that measures against 190 indicators on topics such as health, lifestyles, community, local services and living in Bristol. The survey is a randomised sample that is mailed to 33,000 Bristol households. The 2022-23 survey compromised a total of 3,905 responses.</p> <p>The below shows the percentage by demographic in response to the indicator:</p> <p>'% who find it difficult to manage financially'</p> <table border="1" data-bbox="523 1581 1214 2031"> <thead> <tr> <th>Characteristic</th> <th>% Percentage</th> </tr> </thead> <tbody> <tr> <td>Bristol Average</td> <td>10.2%</td> </tr> <tr> <td>Most Deprived 10%</td> <td>17.5%</td> </tr> <tr> <td>16 to 24 years</td> <td>18.5%</td> </tr> <tr> <td>50 years and older</td> <td>7.8%</td> </tr> <tr> <td>65 years and older</td> <td>5.4%</td> </tr> <tr> <td>Female</td> <td>10.0%</td> </tr> <tr> <td>Male</td> <td>10.3%</td> </tr> </tbody> </table>	Characteristic	% Percentage	Bristol Average	10.2%	Most Deprived 10%	17.5%	16 to 24 years	18.5%	50 years and older	7.8%	65 years and older	5.4%	Female	10.0%	Male	10.3%
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Bristol One City - Cost of Living Crisis Bristol's One City approach to support citizens and communities – What happened and key learning, November 2023	<p>This report provides a summary of Bristol's response to the national cost of living crisis between October 2022 and March 2023.</p> <p>Key headlines are:</p> <ul style="list-style-type: none"> • In August 22 – February 23 the cost-of-living support webpage reached 20,400 unique views • From November 2022 to March 2023, the free 'We are Bristol' helpline logged 359 phone calls linked to the cost-of-living crisis • An estimated 4,911 people per week visited 'Welcome spaces' (a communal warm space that is free to access) over the winter 2022/23 																																																				
Impact of the cost-of-living crisis on black & minoritized communities in Bristol –	<p>The Black Southwest network launched a survey to investigate the impact of the cost-of-living crisis on Black and minoritized communities in the greater Bristol area. In total, there were 127 responses from</p>																																																				

<p>Black Southwest Network, 2023</p>	<p>Black and minoritized individuals to a survey covering a range of topics related to financial concerns.</p> <p>Key headlines are:</p> <ul style="list-style-type: none"> • 75% advised that they are now struggling to afford basic items • 79% stated that they were struggling with at least one type of bill • 68% advised that they are struggling to afford essential services (public transport, healthcare or education) • Of those who identified as being a parent or guardian for a child/children, 41% mentioned concern around education related expenses such as school uniform
<p>Nomis - Official Labour Market Statistics (nomisweb.co.uk) 2022-23</p> <p>Business Demography</p>	<p>80.6% of all people in Bristol are economically active which is higher than nationally (78.6) and in the Southwest (80.7%). Of economically active people in Bristol 8.2% are self-employed, compared to 9.3% nationally. Of those who are economically inactive in Bristol, 35.5% are Students, 26.7% are 'long-term sick' and 18.7% are looking after family/home, as well as 7.9% who are retired.</p> <p>The percentage of 'workless households' in Bristol is 11.2%, compared to 13.9% nationally, and the proportion of working aged people who are benefit claimants is 11.2%. Bristol has a higher proportion of people working in 'professional occupations' (35.2) than for the Southwest (25.4%) and nationally (26.8%).</p> <p>In 2020 (most recent data) the Southwest continued to have the highest five-year 'survival rate' in the UK of businesses that survived into 2020 (this has been the case since 2012). The largest proportion of these surviving businesses, 22%, was in the professional, scientific and technical industry.</p>
<p>Gender and Early Education and Childcare – Spring budget 2023</p>	<p>National data shows that early education and childcare is increasingly expensive. National data shows that 52% of families were concerned about paying for childcare and for 33% of parents, early education and childcare payments are higher than their mortgage or rent, this rises to 47% of those with Black ethnic background, 42% of those receiving universal credit and 38% of single parents.</p> <p>Parents with a one year old child advised that the cost of nursery provision has grown four times faster than their wages. A nursery place for children under two costs between 45-60% of women's average salaries in England. 94% of parents who changed working patterns after having children cited financial reasons as a factor in their decisions.</p>
<p>Bristol City Council – staff data</p>	
<p>HR Analytics data [internal use only – November 2023]</p>	<p>The Workforce Diversity Report shows Bristol City Council Workforce Diversity statistics for Headcount, Sickness, Starters and Leavers data. It excludes data for Locally Managed Schools/Nurseries, Councillors, Casual, Seasonal and External Agency employees. The report is based</p>

on the sensitive information that staff add to Employee Self Service on iTrent (ESS).

	BCC headcount % (19 Nov 2023)	Bristol Working Age Population (16-64)
Age 16-29	11.9%	39.0%
Age 30-39	21.9%	24.0%
Age 40-49	25.2%	16.0%
Age 50-64	41.2%	21.0%
Disabled	8.5%	12%
Asian / Asian British	2.9%	5.8%
Black / Black British	5.1%	5.3%
Mixed ethnicity	3.5%	2.9%
Other ethnic groups	1.7%	1.0%
White	77.2%	85.0%
Female	61.3%	49.1%
Male	38.7%	50.9%
Use another gender term	0.2%	-
Christian	25.2%	43.5%
Other religion/belief	18.2%	7.4%
No religion/belief	32.2%	41.5%
Lesbian, Gay or Bisexual	6.4%	9.1%
Trans	0.2%	-

Additional comments:

2.2 Do you currently monitor relevant activity by the following protected characteristics?

- | | | |
|--|---|---|
| <input checked="" type="checkbox"/> Age | <input checked="" type="checkbox"/> Disability | <input checked="" type="checkbox"/> Gender Reassignment |
| <input checked="" type="checkbox"/> Marriage and Civil Partnership | <input checked="" type="checkbox"/> Pregnancy/Maternity | <input checked="" type="checkbox"/> Race |
| <input checked="" type="checkbox"/> Religion or Belief | <input checked="" type="checkbox"/> Sex | <input checked="" type="checkbox"/> Sexual Orientation |

2.3 Are there any gaps in the evidence base?

Where there are gaps in the evidence, or you don't have enough information about some equality groups, include an equality action to find out in section 4.2 below. This doesn't mean that you can't complete the assessment without the information, but you need to follow up the action and if necessary, review the assessment later. If you are unable to fill in the gaps, then state this clearly with a justification.

For workforce related proposals all relevant characteristics may not be included in HR diversity reporting (e.g. pregnancy/maternity). For smaller teams diversity data may be redacted. A high proportion of not known/not disclosed may require an action to address under-reporting.

Although our corporate approach is to collect diversity monitoring for all relevant characteristics, there are gaps in the available local diversity data for some characteristics, especially where this has not always historically been included in census and statutory reporting e.g. for sexual orientation. We also know there are some under-reporting gaps in our workforce diversity information – where personal and confidential information is voluntarily requested from staff.

2.4 How have you involved communities and groups that could be affected?

You will nearly always need to involve and consult with internal and external stakeholders during your assessment. The extent of the engagement will depend on the nature of the proposal or change. This should usually include individuals and groups representing different relevant protected characteristics. Please include details of any completed engagement and consultation and how representative this had been of Bristol's diverse communities.

Include the main findings of any engagement and consultation in Section 2.1 above.

If you are managing a workforce change process or restructure please refer to [Managing a change process or restructure \(sharepoint.com\)](#) for advice on consulting with employees etc. Relevant stakeholders for engagement about workforce changes may include e.g. staff-led groups and trades unions as well as affected staff.

We launched a public [consultation](#) on our budget proposals between Thursday 9th November and Thursday 21st December. Alongside asking for views on different options for Council Tax and the Social Care precept for 24/25, the consultation set out all the savings proposals we had identified to produce a balanced budget in the context of reduced available funding and increasing financial pressures. In carrying out budget saving equality impact assessments we have also incorporated key learning from local equalities communities in response to previous consultations. Whilst it is a challenge to engage with all our citizens, we know that there are some groups with seldom heard voices with whom we can do a better job at engaging with. Unfortunately, because of the very tight timescales involved in preparing our draft budget proposals, this year we were unable to provide an Easy Read version in time for the launch of the consultation as this takes several days to produce. However, both an Easy Read version and a British Sign Language version was uploaded to the consultation and engagement hub. Paper copies were also distributed with Freepost return. Equalities groups and community groups were contacted, raising awareness of the consultation with a request to circulate to their networks.

As of 3rd January 2024, we received 2,547 responses to the consultation including 168 via Easy Read online and 12 email responses. As part of the consultation, we asked some diversity monitoring questions to help us understand more about the characteristics and circumstances of respondents, as well as to identify differences in their views:

- 8% of responses were from people living in the most deprived areas of the city (by postcode)
- There were significant differences in response rate by Ward e.g. 64 per 10,000 residents in Southville, compared to 18 per 10,000 residents in Hartcliffe and Withywood
- 44% of all survey responses were from women and 56% were from men. This compares to 50% of each sex in the Bristol population. 0.1% of responses were from people who identified as 'other sex'.
- 2% of respondents answered 'yes' to 'do you consider yourself to have a gender identity different from your sex recorded at birth'?
- 13% of respondents were Disabled people
- The highest number of responses were from respondents aged 35-44 years (26%), followed by 25-34 (22%)
- Young people 18-24 were underrepresented (3%) and older age groups, except for age 85+ were overrepresented, compared to the overall Bristol population
- Respondents from some minoritised ethnic backgrounds were underrepresented:
- Asian/Asian British 5% (compared to 7% for Bristol)
- Black/Black British 3% (compared to 6% for Bristol)
- Mixed/Multiple ethnic group 3% (compared to 4% for Bristol)
- Other ethnic background 1% (compared to 2% for Bristol)

- Gypsy / Roma / Irish Traveller 0.2% (compared to 0.3% for Bristol)
- People from Christian and some other faith groups including Muslims (2% respondents compared to 7% population) were somewhat underrepresented
- 11% of respondents were carers
- Those identifying as LGB+ were over-represented when comparing with the Bristol population.

Summary of findings

Council tax

The majority (66%) favour an increase in core Council Tax to support general services in 2024/25.

- 1,046 (42%) would prefer a 3% increase in core Council Tax. This is the option with the highest support
- 316 (13%) favour a 2% increase
- 279 (11%) favour a 1% increase
- 844 (34%) respondents would prefer 'no increase to Council Tax' in 2024/25. This is the option with the second highest support
- 62 respondents did not give a view on Council Tax.

Selections varied dependent on decile. For example,

- in the most deprived decile 42% selected no increase to council tax in comparison to decile 10 (least deprived) which was 25%.
- In the most deprived decile 75% selected no social care precept above 2% in comparison to decile 10 (least deprived) which was 61% and mid-range, 58%.
- In the most deprived decile 14% advised that the proposals would have an effect on them because of a protected characteristic in comparison to the least deprived which was 8%.

Social care precept

The majority (60%), favour some Social Care Precept (on top of core Council Tax) to support the delivery of social care in 2024/25.

- 932 (37%) would prefer a 2% Social Care Precept. This is the option with the second highest support
- 566 (23%) favour a 1% Social Care Precept
- 966 (40%) respondents would prefer no Social Care Precept in 2024/25. This is the option with the highest support
- 53 respondents did not give a view on Social Care Precept.

Similarly with Council Tax, selections varied dependent on decile.

- in the most deprived decile 49% selected no increase to council tax in comparison to decile 10 (least deprived) which was 33%.

The option with the highest support (30%) is a 3% increase in core Council Tax and a 2% Social Care Precept. This is the maximum increase permitted under government limits announced on 18 December 2023 in the [Provisional local government finance settlement: England, 2024 to 2025](#)

Comments opposed to increasing council tax and the social care precept largely focused on the fact that people are already struggling financially given the current cost of living crisis, and any increase would place additional pressures on budgets. This could lead to further challenges with paying mortgages, food poverty and heating homes. Comments in favour emphasised on the importance of services such as

social care supporting vulnerable groups. Calls were made for proportional taxation based on income or property value.

Respondents were asked what effect, if any, the proposals would have on them because of their protected characteristics. Of the 2,547 respondents to the survey, 87% answered the question.

- (8%) said the proposals would have a very negative effect
- (12%) said the proposals would have a slightly negative effect
- (77%) said the proposals would have no effect
- (2%) said the proposals would have a slightly positive effect
- (1%) said the proposals would have a very positive effect.

This fluctuated between different deciles, 14% in the most deprived area advised that the proposals would have a very negative effect because of protected characteristics, compared to 6% in the least deprived.

Reasons why the proposals would have an effect because of protected characteristics were cited as:

- Financial struggles and the impact of rising costs (30% who responded in the free text box to this question cited this reason). Examples include but are not limited to:
 - Additional council tax rises will be particularly challenging for retired individuals who have limited income, especially due to fixed pension rates
 - difficulty in affording housing, and saving for the future were highlighted, particularly for younger individuals
- Impact on specific demographics (18% who responded in the free text box to this question cited this reason). Examples include but are not limited to:
 - Specific concerns raised by single parents, disabled individuals, and those on fixed pensions about their vulnerability to cost increases.
 - Criticisms related to gender disparities, especially concerning pay gaps and the differential treatment of households based on marital or partnership status.
 - Challenges highlighted for single parents, carers, single occupants, those on maternity leave, and those on limited benefits facing financial difficulties, indicating potential impacts of increased taxes on their budgets.
 - Mention of specific groups, including LGBT+ individuals, foreign nationals, and women, highlighting concerns about negative effects of increased taxes on their lives and livelihoods.
- Concerns on the disproportionate impact on vulnerable and minority groups (17% who responded in the free text box to this question cited this reason). Examples include but are not limited to:
 - Concerns raised by disabled individuals and carers regarding increased living expenses, financial strain, and limitations in accessing support services.
 - Challenges highlighted include difficulties in managing everyday costs, transportation expenses, and energy needs due to disabilities. Struggles in accessing specialised support, private school costs, and disparities in societal assistance despite paying taxes also raised as issues.
 - Calls for increased funding and improvements in provisions for Special Educational Needs (SEN) and social care for disabled individuals and families.

Other reasons were summarised as:

- Concerns around council governance, decisions and the consultation (12%)
- Concerns about the impact on the community and public services (9%)
- Issues regarding accessibility, equality and fairness (6%)
- Concerns around the impact on health and wellbeing (3%)

A full detailed breakdown of the responses will be available on the [consultation and engagement](#) hub Monday 15th January 2024.

2.5 How will engagement with stakeholders continue?

Explain how you will continue to engage with stakeholders throughout the course of planning and delivery. Please describe where more engagement and consultation is required and set out how you intend to undertake it. Include any targeted work to seek the views of under-represented groups. If you do not intend to undertake it, please set out your justification. You can ask the Equality and Inclusion Team for help in targeting particular groups.

All responses to the Budget Consultation have been analysed and will be included in the Council’s Budget report that will be published on the Bristol City Council website from Monday 15th January 2024. We will take Budget consultation responses into account when developing the final proposals to put to the Cabinet, which is scheduled for 23rd January 2024 and a meeting of the Full Council for approval, 20th February 2024 where final decision will be taken.

Step 3: Who might the proposal impact?

Analysis of impacts must be rigorous. Please demonstrate your analysis of any impacts of the proposal in this section, referring to evidence you have gathered above and the characteristics protected by the Equality Act 2010. Also include details of existing issues for particular groups that you are aware of and are seeking to address or mitigate through this proposal. See detailed guidance documents for advice on identifying potential impacts etc. [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#)

3.1 Does the proposal have any potentially adverse impacts on people based on their protected or other relevant characteristics?

Consider sub-categories and how people with combined characteristics (e.g. young women) might have particular needs or experience particular kinds of disadvantage.

Where mitigations indicate a follow-on action, include this in the ‘Action Plan’ Section 4.2 below.

GENERAL COMMENTS (highlight any potential issues that might impact all or many groups)

Overview

Even when we plan to consult in more detail on specific service delivery proposals at a later time, we must ensure that any budget setting decisions that are likely to affect future services are informed by sufficient consultation and proper analysis. This is so that decision makers can have due regard to any likely disproportionate or negative impact on the basis of protected and other relevant characteristics at the time the budget is approved – not afterwards.

Decision makers will have the ability to make changes to the individual spending plans following further consultation as appropriate and detailed evaluation of the impact of specific proposals. Within the proposed budget envelope there will be financial mitigation put aside for any non-delivery or

amendments to proposals which may occur due to future consideration of equalities issues or other factors.

As well as identifying whether budget changes will have a disproportionate impact on particular groups (e.g., because they are over-represented in a particular cohort), we need to pay particular attention to the risk of indirect discrimination: when an apparently neutral decision puts members of a given group at a particular disadvantage compared with other people because of their different needs and circumstances. We are also aware of existing structural inequalities and particular considerations, issues, and disparities for people in Bristol based on their characteristics, which we will take into account.

Alongside other public bodies we are in an unprecedented period of financial pressure, with significant challenges in being able to meet all our statutory duties within a balanced budget. As a local authority these responsibilities include ensuring, so far as reasonably practicable, sufficient provision of specific services within the area to meet the needs of particular groups such as: our duty of care for adult social care and children's services; education; housing policy and homelessness prevention; health, safety and licensing; and libraries. In setting our budget we prioritised statutory over discretionary services. The cumulative impact of these proposals may exacerbate existing levels of inequality and we should be aware that there may also be a disproportionate impact on demographic groups who are not recorded in the Quality of Life survey such as asylum seekers, refugees and those with no resource to public funds.

Savings proposals

Workforce changes

Where budget proposals are likely to impact on our workforce, we will carry out consultation in line with the Council's Management of Change process and seek advice from HR and the Equality and Inclusion Team to mitigate risks of discrimination. For any savings which are likely to lead to changed job roles for our employees we will: use positive action initiatives as appropriate to address under representation across the workforce; advertise any new job opportunities in a range of ways to ensure a wide pool of applicants; review job paperwork including job descriptions and employee specification to make sure they are only for the skills, experiences and qualities needed to do the job and there are no discriminatory statements/requirements; and check tests, assessments and interview processes are accessible and transparent.

The operating model re-design of the Children and Education directorate is in line with the current activities within the transformation programmes (Our Families), previously agreed by cabinet and is anticipated to enable us to deliver our work more effectively. The 'Our Families' programme board provide programme governance and alignment with wider changes in children's services, embedding equality and inclusion into operating model activities will help ensure effective outcomes and ensure no discrimination occurs throughout the process. We will ensure that service redesign is informed by meaningful consultation, comprehensive needs analysis and equality impact assessment that includes consideration of the changing landscape of external specialist provision. A smaller workforce and less recruitment could mean it will take longer to address existing underrepresentation, pay gaps and other disparities particularly on the basis of age, disability, ethnicity and sex. In some service areas, shrinking capacity may lead to an increase in workforce stress/pressure and reduced flexibility. Reviews of management structure should consider the impact on diversifying the workforce, and representation at leadership levels.

Reducing the council's discretionary learning and development budget is likely to impact the council's overall knowledge and skills in relation to best practice of Equality and Inclusion. The council will continue to deliver statutory and mandatory learning and will continue to prioritise funding for Equality and Inclusion where possible, however, learning and development training on other topics may be

reduced, widening knowledge gaps. The impact of this will be monitored through the diversity dashboard and responses to the staff survey. Having two application windows for the annual leave top up scheme is in line with previous years, but the cumulative impact on staff on lower paygrades whom this may feel inaccessible to should be continually monitored. Promoting the scheme in an accessible way to all employees and increasing awareness around the councils flexible working policies should be maximised to support those with other responsibilities such as caring responsibilities.

Community engagement

The Community Development team currently work with priority neighbourhoods, some of which are in the most deprived areas of the city ([Deprivation, 2019](#)). The team works in partnership with a wide range of organisations to promote community cohesion. The current programme of work will continue to be delivered; however, no new operational work will be delivered which may impact the council's ability to further advance equality of opportunity and foster good relations to a greater extent. Although priorities have not been set yet, and this is not committed spend, the need to invest in community development and support equalities across the city is growing.

Health, care and wellbeing

Bristol Quality of Life results showed that results for health and wellbeing indicators in 2022-23 were generally worse than 2021-22 and there are large health deprivation gaps within the city. There are multiple savings related to health care and wellbeing designed to make us work more efficiently. Where we are planning on increasing the number of reviews at shortened stages, the council must ensure that the provision and quality of care people receive is not impacted. Although there are likely to be some service users identified as being able to be discharged from care earlier, there will be some who still require access to care, and this should be sustained to ensure we do not exacerbate existing inequalities and support our duties outlined in the Care Act (2014). Older people and Disabled people are likely to be over-represented in cohorts receiving support, and so reviews should be carefully tailored to support these groups and any changes to care communicated sensitively and appropriately. The ageing population is increasingly diverse, and so ensuring changes to care are person-led, considerate of protected and other characteristics, based on an understanding of health equity and communicated in an accessible way is increasingly important. Staff completing reviews should have a good understanding of disability and race equality. Additionally, any reliance on social or community networks may further burden other groups such as carers.

Proposals that are related to increasing independence to alleviate pressures on other services should factor in equality and inclusion into service design and ensure assessing independence accounts for protected characteristics. Although this approach is anticipated to improve our effectiveness, we also know that other public bodies including NHS Trusts are also under enormous financial strain. The underlying reasons for the Council's budget deficit are far reaching and likely to impact other public bodies and providers and we should avoid making any assumptions that people's needs will still be met by other external provision if we change our existing services.

The [consultation for the Fair and Affordable Care policy](#) is due to close towards the end of January 2024. The policy sets out the council's future approach to Care Act Assessments, identifying how we will meet individual needs whilst ensuring best value for money under current financial pressures. The Policy describes the ways in which we will arrange care in a manner that reflects the choice and preferences of individuals but balances the need for us to arrange care that is sufficient to meet eligible needs whilst always looking to make best value of the finite resources available to us. The policy is likely to have disproportionate impacts on Disabled people and carers as there may be occasions where the support offered will not be the individual's preference or first choice of care. Responses to the consultation will need to be carefully considered and care should be person-centred, promote independence where

possible and ensure adherence to the Human Rights Act. Disabled people's groups should be consulted with where appropriate and internal equalities working groups collaborated with to ensure effective delivery and transparency.

Support for parents and children

A management plan has been developed to ensure the efficient and effective delivery of the Dedicated Schools Grant. The plan brings together the transformation programme, activities around Delivering Better Value (DBV) and Bristol's Special Educational Needs (SEND) activities. Any changes to the Dedicated schools grant will have multiple, intersecting equality impacts that require careful consideration. External expertise should be consulted with where appropriate to ensure accountability and that changes are meeting objectives related to creating more inclusive spaces for children. Co-production activities should be embedded into workstreams including with a wide range of stakeholders, parents and children from diverse backgrounds to capture different lived experiences. Programme boards should consistently pay due regard to equalities issues when decision making, to ensure effective governance, compliance with equality processes and to ensure we are achieving the best outcomes. Robust monitoring and adapting of deliverables will help ensure the needs of children, including complex needs are supported. Developing a culture of inclusion should continue to be prioritised and engagement with other sectors would be beneficial, to ensure a holistic approach to support. Activities will be subject to their own equalities assessment to ensure any risks and supporting mitigations are identified. Actions developed from the equality assessment process should be carefully monitored and implemented.

Like every local authority in England, Bristol has seen significant rising levels of Disabled Children diagnosed with SEND in schools in recent years, and budgets have not increased sufficiently to meet the current demand. There are 13,500 pupils in Bristol who have been diagnosed with SEND, this has increased 43% since 2016. Supporting children who require more support than what is ordinarily available has been a priority issue for the council, but the process has now become unsustainable. The [consultation for Bristol's Special Educational Needs \(SEND\)](#) funding closed on 13th December 2023. The purpose of the consultation was to gather views on how we provide non-statutory, discretionary top-up funding for children who have SEND but not an education, health and care plan (EHCP). Those receiving funding currently are more likely to be eligible for free school meals and pupils with SEND attendance at school is consistently lower. Black African children are 27% more likely to be in receipt of non-statutory top-up at mainstream schools, 60% more likely to be at a special school than the average child in Bristol and 41.6% of pupils with SEND support live in a deprived area. The budget is finite and a continuation of the current process puts the school system in Bristol at risk, so we must now review how the money is spent. There is likely to be a disproportionate negative impact on Disabled children who currently receive funding. Responses to the consultation will be carefully reviewed and the council will work with schools, parents and children to minimise impacts on equality of opportunity, especially where children have combined characteristics, so as to not widen existing educational gaps.

Transport and connectivity

The council will use net proceeds from the Clean Air Zone charges to support local transport schemes and change the way we pay for things. Investing into highways maintenance and highways network is likely to have a positive impact by ensuring roads and pavements are maintained in better conditions and are more accessible. Accessibility when carrying out any works should be continued to be prioritised. Any restructures or changes to services should use this as an opportunity to diversify the workforce.

Accommodation

There will be a rent and service charge increase in rents from April 2024, this is applicable to general needs accommodation, supported housing, temporary accommodation and garages and is to relieve pressures on the Housing Revenue Account. The maximum increase is determined by the government using a rent formula, a cap was introduced for the previous year which has now been lifted. Bristol quality of life data shows that, already, those renting from the council have several indicators significantly worse in relation to financial stability:

Indicator	% Bristol average	Rented from the council
% who find it difficult to manage financially	10.2%	25.9%
% extremely worried about keeping their home warm this winter	20.9%	47.5%
% households that used a food bank during the last 12 months	1.9%	6.8%
% households which have experienced moderate to severe food insecurity	8.1%	26.4%

Decision makers should consider the impact increases will have on tenants. Lettings officers will work with tenants on an individual basis and, where appropriate, put support plans in place and signpost to other financial resources to help minimise the impact on tenants. There are a high proportion of Disabled tenants in council-rented accommodation in comparison to the Bristol average, therefore specific financial and other support tailored to the needs of Disabled people should be shared where possible. Communications around increases in rent and service charges will be available in multiple languages and via accessible means. A fund has been made available specifically for residents struggling to pay rent, in addition to a crisis fund.

Almost three in ten homes in Bristol are privately rented. Private rental prices continue to grow annually, research from Bristol determined that 69% of low-income private renters in England will be forced to go without food and heating at least one day per week to meet rising housing and living cost ([Bristol One City, 2022](#)). Young people are often over-represented in privately rented homes. Decision makers should consider the likelihood of a knock-on effect for tenants when introducing costing licensing schemes for landlords. There is a small risk that landlords will transfer the additional costs down to tenants to avoid absorbing costs which could disproportionately impact those from lower socio-economic households. The impact of the scheme will be reviewed for its effectiveness, and local rent prices will need to be reviewed carefully. Overall, it is designed to have a positive equalities impact by improving living standards for tenants of rented, private accommodation which is greatly needed. Other proposals focused on accommodation; increasing direct lets with private landlords and developing two new solo homes for foster children will consider the suitability of accommodation based on the needs of service users based on Disability status, cultural needs and other characteristics when designing and placing people in accommodation to advance equality of opportunity. Physical accessibility needs should be prioritised, and BCC utilise this as an opportunity to work with landlords to raise awareness on accessible accommodation.

Income generation and contract management

Whilst we take a corporate approach to inflation, which includes on fees and charges, we have some savings linked to fees and charges to clients, partners or citizens for goods or services, where we are proposing increases above that inflationary rate. This is reflective of the markets and conditions in those specific areas as well as to ensure that we are able to recover costs of providing services. This ensures we are not cross subsidising chargeable areas through other income sources. We may seek to secure more grants and external funding for services and activities, and collect debts which are owed to us ethically, but more effectively. Increasing business-to-business charges for goods/services may have a disproportionate impact on small businesses and the local voluntary and community sector- in particular for organisations who are led by those who are racially minoritised and for those who support equalities groups. We will consider the impact of particular users on a case-by-case basis, promote initiatives which address lack of equity, and provide discretionary concessions for external equalities-led stakeholder organisations where appropriate.

Contract negotiation and better contract management forms a core part of the budget proposals. Although this is designed to improve efficiencies, this should be carefully monitored to ensure it does not impact the quality of goods and services that subsequently may impact service-users. Robust monitoring of contracts should continue to take place with quality checks and equality and inclusion embedded into review processes.

Low-income households

Deprivation and cost of living crisis

Although the annual inflation rate is down on the previous year (October 2023), energy prices remain extremely high. Gas prices nationally in October 2023 were 60% higher than the previous two years and electricity was 40% higher than the previous two years ([Census, 2023](#)). Census data also showed that around two thirds of adults nationally are spending less on non-essentials because of cost-of-living increases.

The cost-of-living crisis disproportionately impacts those from lower-income households due to additional financial strain on essential spending. Bristol Quality of life data showed that 61.9% of people in the 10% most deprived areas were extremely or moderately worried about keeping their home warm in winter, the Bristol average was 48.0%. The cost-of-living crisis has wider-reaching, intersecting impacts on issues such as health-as people may be in poorer living-conditions, there are increases in poor mental health due to stress and increases in food insecurity leading to poor health. Decision makers should be aware of the potential cumulative impact of multiple savings proposals which taken together are likely to amount to increased charges for council services overall and consider whether there are any specific mitigations which can be put in place to reduce the disproportionate negative impact of this on people living in deprivation. Protecting vulnerable households remains a priority for the council and we will continue to use our discretionary funds to provide support to those most in need in 2024/25 and help low-income households with poverty.

Council tax reduction scheme

The council currently provides a Council Tax Reduction Scheme, which was introduced in 2013 and helps people on a low income with up to 100% of their council tax costs. The scheme has continued despite the reduction in government funding and Bristol has been among only a small number of authorities to retain a fully funded scheme for those that need financial support. In February 2023 it was agreed by full council that the scheme would be reviewed as part of the budget setting process. A public consultation launched in October-November 2023 with ten options being proposed. 6,533 surveys were completed, in total 40% wanted no change to the scheme and 60% wanted some change to the current scheme. Monitoring of responses showed that a high proportion of Disabled people responded to the

consultation. The decision went to [cabinet](#) on 5th December 2023 and it was agreed that there would be no change to Bristol's 2024/25 Council tax reduction scheme. The scheme remains unchanged, which will ease pressures on those from low-income households who are reliant on the scheme, this has been reflected in the proposed budget with the related saving being outlined as a proposed write-off as now undeliverable in the 2024-25 budget.

Council funding

General reserves- in addition to the council's budgets to pay for investment and day-to-day services, the council also holds money in reserve, which is required to cover one-off unexpected expenditure, reduced income arising in any particular year and emergency events such as natural disasters and other unforeseen urgent needs. Whilst it is possible to top-up with money from reserves, as it can only be used once, this could only be a short-term solution and the full funding gap will still be evident and need to be addressed. Additionally, a reduction in reserves can reduce the Council's capacity to respond to the emerging needs of equalities communities in relation to accessibility and inclusion etc.

Housing Revenue Account is a separate ring-fenced account covering all activities of Bristol City Council as a landlord and is mostly made up of the rent we collect. This money is used to plan and provide services for people living in council housing, including repairs and improvements. The Housing Revenue Account also has a programme to build new council homes and invest in additional stock. The HRA budget reflects a commitment to increase investment in the existing stock, to be funded through a series of above inflationary increases in rents, with a 7.7% rent and service charge increase from April 2024 (applicable to general needs accommodation, supported housing, temporary accommodation and garages).

The Dedicated schools grant comes from UK government and can only be used to pay for schools and education services for children and young people in Bristol. The Early Years Block within this is used to fund free nursery and pre-school hours for eligible children up to 4 years. The High Needs Block is dedicated funding for children and young people with special educational needs and disabilities (SEND) or for those who need alternative provision, such as Pupil Referral. There is an increasing demand for Education, Health and Care Plans and special educational needs provision. The provisional uplift applied to the High Needs Block is 5% but based on the historic deficits and current trends, this will not be sufficient for the funding needs within the High Needs Block. A Mitigation Plan has been developed that includes a range of deficit mitigation measures and identifies further work required to ensure sustainability in high needs service provision in the coming financial years.

The public health budget is a yearly UK Government grant to promote good mental and physical health in the city and pay for services that help people be healthier and stay healthy. The amount of funding allocated for public health is dictated by central government and we are required to spend the money in line with set guidelines known as the 'Public Health Outcomes Framework'.

The capital budget is spent on investing in the city by building e.g., schools and houses, introducing new transport options, maintaining and improving existing stock, supporting infrastructure work and supporting invest to save measures such as those included in the budget for children's homes sufficiency and fostering placements which should save money in the future.

Some activities that have an equalities impact will be dependent on expected income. If we do not receive as much income as expected, then we will ensure equality impact assessments are completed for any activities affected. At this stage, it is not possible to provide an assessment.

Protected characteristics	
Age: Young People	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Existing issues and considerations	<ul style="list-style-type: none"> • Bristol has a younger age profile in comparison to the national average (This is partly due to the large number of students living in Bristol during term time who are counted as part of the usually resident population). • Young people are often under-represented in engagement and consultation in Bristol and are less satisfied than average with the way the council runs things. • Children and young people in Bristol are considerably more ethnically diverse than the overall population of Bristol. <ul style="list-style-type: none"> ○ In 2021 more than half (52%) of Somalis living in Bristol were aged under 20 (Bristol total population 23% aged under 20) • Children and young people from the most deprived areas of Bristol have the poorest outcomes in health and education in terms of health, education and future employment etc. • Young people in Bristol are more likely to: <ul style="list-style-type: none"> ○ has poor emotional health and wellbeing ○ find inaccessible public transport prevents them from leaving their home when they want to ○ 6.8% of 16–17-year-olds (2020/21) were “not in education, employment or training” (NEET), worse than the national average (5.5%) • Young adults are most likely to have lost work or seen their income drop because of COVID-19 and the cost-of-living crisis • There are 91,900 children under 18 living in Bristol (Census 2021) • 21.8% (17,955) of children under 16 live in relative low-income families (Census 2021) • Across Bristol, there were 694 children in care as at the end of March 2022 (Figure 1). This has increased from previous years. <ul style="list-style-type: none"> ○ Boys are over-represented in the cohort and two-thirds of children in care are of white ethnicity (JSNA). ○ 68% of children in care were from the most deprived 30% of the population. • Young people are more likely to be over-represented in rented accommodation • Young people (16-29) are under-represented in Bristol City Council’s workforce (11.9%) in comparison to those aged 50-64 (41.2%). • Children in the most deprived areas are over five times (5.25) more likely to be injured in motor traffic collisions than those in the least deprived areas
Mitigations:	When considering proposals, consideration should be taken over existing disparities within young people such as educational gaps between Black, Asian and minority ethnic pupils and white pupils, or pupils from low-income households. Consideration should be taken on intersecting characteristics, such as being young and Disabled, and the impact budget proposals taken together may have on combined characteristics. Mitigations will centre around communicating effectively with children, parents and educational settings, signposting to support where possible and working with young people on an individual basis to support their needs. We will continue to monitor outcomes via demographic breakdowns and protected characteristics.

	<p>Proposals related to children in care are anticipated to have a positive impact on young people through increasing the council’s capacity to support children appropriately. Mitigations to support these approaches are ensuring a child-led process for the design and development of the homes based on service-user need and a proactive and targeted recruitment approach will be adopted to widen the pool of foster carers better able to support a wider variety of needs. In addition to the direct impact of “Children and Families” savings proposals there may be a disproportionate cumulative impact for children and young people from various budget proposals where there are existing disparities in access and inclusion.</p> <p>Workforce efficiencies and changes may have a disproportionate impact on younger employees who are more likely to be employed on fixed term contracts and a large proportion of under 35's are leaving after the end of a fixed term contract. The impact of increased working from home can make it harder for younger and newer employees to be fully part of pre-existing teams – this will be mitigated where possible through positive action initiatives and ongoing liaison with the Young Professionals Network staff led group.</p>
Age: Older People	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Existing issues and considerations	<ul style="list-style-type: none"> • There is a higher prevalence of Disability in older age groups • Older people in Bristol are: <ul style="list-style-type: none"> o less likely to be comfortable using digital services (17.5% of people aged 65 years and older advised they lack the skills or confidence to use the internet, the Bristol average is 4.4%) o more reliant on public and community transport o more likely to be an unpaid carer o more likely to help out or volunteer in their community o less likely to have formal qualifications • Bristol Ageing Better estimated at least 11,000 older people are experiencing isolation in the city. • We must factor aging and the needs of older people into long term budgeting and service design
Mitigations:	<p>Changes to Health, Care and Wellbeing is likely to disproportionately impact older people due to them being over-represented as service-users. Changes to care need to be communicated clearly and consistently with a wide range of accessible communications for older people. The population of older people in Bristol is increasingly diverse and proposals to make changes in commissioned services for older adults may reduce the focus on providing accessible and flexible services unless revised specifications have an explicit equality and inclusion focus. Open dialogue with older people and engagement with older people advocacy groups will help to ensure care is appropriate and effective in supporting their needs.</p> <p>Workforce efficiencies and changes may have a disproportionate impact on older employees if they are closer to retirement age. Tailored communications, considerate of the needs and perspectives of older people will help ensure they receive sufficient information, and line managers should communicate with individuals around any support needs.</p>
Disability	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Existing issues and considerations	<ul style="list-style-type: none"> • More than 81,000 (17.2%) people in Bristol have long-term physical or mental health conditions or illnesses whose day-to-day activities were limited

	<ul style="list-style-type: none"> • Over 13,500 pupils in Bristol been diagnosed with special educational needs (SEN) • Disabled people are twice as likely to live in social rented accommodation than people not Disabled - 32% live in social rented housing compared to 16% of people not Disabled • Disability prevalence increases with age in Bristol: children 6.1% disabled, working age 16.0% disabled, older people 65+ 38.5% disabled • More than a quarter (27%) of the ‘White Gypsy or Irish Traveller’ population said they had a long-term physical or mental health issue or disability that affected their daily lives - 10 percentage points more than the Bristol average (17%) • Disability rates higher than the city average (17%) are found in the ‘Black or Black British Caribbean’ population (23%), the ‘White Irish’ population (21%) and the ‘White British’ population (19%) • Just 18% of Disabled people aged 16+ whose day-to-day activities are limited a lot have a degree or higher – 27 percentage points lower than people not disabled at 45% • Almost 2 in 5 (39%) Disabled people whose day-to-day activities are limited a lot do not have access to a car or van compared to just 17% of people not disabled • Over a quarter of Disabled people (26.4%) report suffering from Disability discrimination or harassment in the last year • Over an eighth (13.0%) have experienced severe food insecurity, over three and a half times the city average • Local data shows 21% of Bristol residents have “below average mental wellbeing”, rising to 34.2% in the most deprived areas. • Disabled people are the least satisfied with life (32.5%), significantly lower than the Bristol average (62.4%) • Disabled people should be empowered to make independent living choices and have a say in access to service provision. • Budget setting needs to provide sufficient resource and flexibility to meet our legal duty to make anticipatory and responsive reasonable adjustments for disabled people including: <ul style="list-style-type: none"> ○ changing the way things are done e.g., opening / working times. ○ changes to overcome barriers created by the physical features of premises. ○ providing auxiliary aids e.g., extra equipment or a different or additional service. ○ is ‘anticipatory’ so we must think in advance and ongoing about what disabled people might reasonably need. • Disabled people must not be charged for their reasonable adjustments, accessible formats or other adaptations. It is a legal requirement under the Equalities Act to ensure information is accessible to Disabled employees and service users. • Disabled staff are under-represented in the workforce (8.5%).
Mitigations:	Changes in non-statutory, discretionary funding will impact on Disabled young people, some with intersecting and complex needs. A smaller, more targeted approach is required in order for it to be sustainable, however, changes cannot guarantee that all those that require funding will continue to receive it.

	<p>Communicating changes with children, parents and educational settings effectively will be essential and, where possible, signposting to other resources. Proposals related to reviews of care need to carefully consider the intersecting and specific needs of Disabled people when promoting independence and increasing reviews. This may have a positive impact through increased contact time to ensure needs are met appropriately but needs to be sensitively applied dependent on individual circumstances, ensuring continued high-quality care for people that need it. Ensuring staff completing reviews are trained in disability equality and have developed knowledge beyond medical models of Disability, will help to ensure independence is supported effectively. Where we are proposing supporting people with technology and equipment, we need to ensure Disabled people feel confident in using equipment to support their needs independently. Accommodation, including children’s accommodation and temporary accommodation should ensure high-quality, accessible options for Disabled people and that we maximise on the opportunity to engage with landlords around Disability awareness. If we are changing the way we work, we should ensure that we are communicating to service-users in accessible formats. Engaging with Disabled-led groups locally, and internal equality groups around changes will help to minimise impact. Responses to any relevant consultation should be carefully considered to ensure changes are informed by those who may be impacted.</p> <p>Workforce efficiencies and changes may have a disproportionate impact on disabled colleagues unless emerging accessibility issues are adequately mitigated through ongoing equality impact assessment and liaison with e.g. the Disabled Colleagues Network prior to implementation.</p> <p>Overall, there is likely to be a disproportionate, negative impact on Disabled people due to the number of proposals related to health, care and wellbeing, the consultation on the Fair and Affordable Care Policy and the consultation on Bristol’s SEND funding, that could further existing inequality gaps.</p>
Sex	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Existing issues and considerations	<ul style="list-style-type: none"> • Men are under-represented in the workforce (38.7%) • The average UK pay gap is 14.8% in favour of men (ONS, 2023) • Women still bear the majority of caring responsibilities for both children and older relatives. • Women are more likely to be excluded from conversations which affect decision making due to lack of representation in boards / organisational leadership. • Services and workplace requirements may not take into consideration the impact of women’s reproductive life course including menstruation, avoiding pregnancy, pregnancy, childbirth, breastfeeding, and menopause. • Young women between the ages of 16 and 24 have higher risk of common mental health problems and higher rates of self-harm and post-traumatic stress disorder etc. • In Bristol, females over the age of 16 are 2.5 times more likely to be a victim of a domestic abuse related crime than males (JSNA, 2023) • Women in Bristol live an average of 21.2 years in poor health. This is higher than England average for women and over 2.5 years worse than the Bristol average for men.

	<ul style="list-style-type: none"> Men in Bristol live on average 18.7 years in poor health – which is also higher than the England average for men (JSNA, 2023) A higher proportion of boys have physical impairments and more boys than girls 62% of pupils with Special Educational Needs are boys have diagnosed mental health disorders and learning difficulties. Men are three times more likely than women to take their own lives.
Mitigations:	<p>The cumulative impact of proposed savings may have a disproportionate impact on women because of existing economic and structural inequalities which mean that they are more dependent on existing services. Any changes to services should take into consideration the differing needs of female and male service users.</p> <p>Workforce efficiencies and changes will have a disproportionate impact on women as over 60% of employees, however there is wide variance in the proportion of female and male employees between teams. Female employees are much more likely to work part time which is likely to be because of unpaid caring responsibilities for children and older adults. This can be partly mitigated through the Council’s Flexible Working Policy, and we are committed to helping all employees achieve a balance between their working life and other priorities such as parental and caring responsibilities etc.</p>
Sexual orientation	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Existing issues and considerations	<ul style="list-style-type: none"> Census date (2021) showed that 6.1% of Bristol’s population identify as LGB+ LGB people are under-represented in the workforce (6.4%). Lesbian, gay and bisexual people are statistically more vulnerable to verbal and physical abuse 55.5% thought that sexual harassment is an issue in Bristol, higher than the Bristol average (34.6%) 35.9% said that their mental/emotional health prevents them from leaving the house, significantly higher than the Bristol average (15.6%) 49.7% reported they were satisfied with life; this is lower than the Bristol average (62.4%) 52.6% reduced spending on essentials due to concerns about energy prices, this is higher than the Bristol average (41.6%) 71.7% reported they felt satisfied that they can stay in their home for as long as they choose to, this is lower than the Bristol average of 81.9% 14.4% of households have experienced moderate, to severe food insecurity, this is higher than the Bristol average 8.1% One in ten black, Asian and minority ethnic LGBT staff (10 per cent) have similarly been physically attacked because of their sexual orientation and/or gender identity, compared to three per cent of white LGBT staff Almost one in five LGBT staff (18 per cent) have been the target of negative comments or conduct from work colleagues in the last year because they’re LGBT
Mitigations:	Proposals to make changes in services may reduce the focus on providing LGBTQ+ friendly services unless revised specifications have an explicit equality and inclusion focus.

	Workforce efficiencies and changes may have a disproportionate impact on sexual orientation if relocated lesbian, gay and bisexual staff have concerns about discrimination in their new setting. The Council is committed to promoting an inclusive working environment and challenging discriminatory behaviour.
Pregnancy / Maternity	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Existing issues and considerations	<ul style="list-style-type: none"> • The Equality Act 2010 applies to those who are pregnant or have given birth in the past 26 weeks, as well as making provisions to protect the rights of breastfeeding mothers. • Around 80% of women will give birth and many women will also experience termination, miscarriage and stillbirth • In the workplace we need to ensure equal access to recruitment, personal development, promotion and retention for employees who are pregnant or on maternity leave (including briefing and updates for any workforce changes) • Ensure there is equality of opportunity for services in relation to pregnancy and maternity. This includes e.g. providing physical access when using prams and pushchairs, and availability of toilets and baby-changing facilities etc., and flexible working patterns and service times for childcare arrangements • Women from minoritised ethnic backgrounds are more likely to experience complications at birth
Mitigations:	Workforce efficiencies and changes may have a disproportionate impact on pregnancy employees. We need to ensure equal access to recruitment, personal development, promotion and retention for employees who are pregnant or on maternity leave - including briefing and updates for any workforce changes.
Gender reassignment	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Existing issues and considerations	<ul style="list-style-type: none"> • 6 in 10 (59.8%) suffered from discrimination and harassment in the past year, and almost 1 in 3 (32.2%) feel unsafe from sexual harassment using public transport. • Almost a third experience food insecurity (32.7%) and a third (32.5%; not necessarily the same people) find it difficult to manage financially. • Over half (53.7%) are sometimes prevented from leaving home due to their mental / emotional health. • 40.3% of Trans people said they feel safe outdoors after dark compared to the Bristol average of 57.5% • 37% of trans people and 33% of non-binary people had avoided healthcare through fear of discrimination • 25% of trans people had been homeless at some point in their lives • Trans people are under-represented in the workforce (0.2%)
Mitigations:	<p>Proposals to make savings in services may reduce the focus on providing trans inclusive services unless revised specifications have an explicit equality and inclusion focus.</p> <p>Workforce efficiencies and changes may have a disproportionate impact on relocated trans employees if they have concerns about discrimination in their new setting. The Council is committed to promoting an inclusive working environment and challenging discriminatory behaviour.</p>

Race	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Existing issues and considerations	<ul style="list-style-type: none"> • In the UK in 2022 black employees had the biggest pay gap of 5.6% in comparison to white employees • Black, Asian and minority ethnic people are less likely to be satisfied overall with their current accommodation (74.2%) in comparison to the Bristol average (84.2%) • 57.7% of Black, Asian and minority ethnic people extremely or moderately worried about keeping their home warm this winter in comparison to the Bristol average at 48.0%. • 17.2% of Black, Asian and minority ethnic households have experienced moderate to severe food insecurity in comparison to the Bristol average at 8.1% • Just over a quarter of people of Black ethnicity report below average mental wellbeing, higher than the city average • The majority (85%) of the Somali population live in socially rented accommodation – a level four times higher than the Bristol average (19%) • Overcrowding is most common for people who identified as ‘Black or Black British African’, with nearly half of people (47%) living in overcrowded homes compared with 10% of the overall population • 36% of children belong to a minority ethnic group • People who do not speak English as a main language may require information in plain English and community language translations or videos or visual communications
Mitigations:	The cumulative impact of proposed savings may have a disproportionate impact on the protected characteristic of race because of existing economic and structural inequalities, especially health inequalities may mean that they already may have less access to services. Proposals which have an element of communications such as reducing spend on the Bristol Legible City and communicating licensing fees should consider the impact on those that do not read/speak English. Alternative provisions or access to translation services should be considered. Proposals related to community engagement will largely impact minoritised groups as they are the main beneficiaries of this service. Workforce efficiencies and changes may have a disproportionate impact on Black, Asian and minority ethnic employees who proportionally under-represented on higher salary bands, and statistically more likely to raise formal grievances and be subject to disciplinaries. This should be mitigated through a range of positive action initiatives and specific race equality actions.
Religion or Belief	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Existing issues and considerations	<ul style="list-style-type: none"> • More than 45 religions represented in Bristol • More than half (51%) of people state they have no religion - the third highest proportion of all local authorities in England • The second highest proportion is Christian (32.2%), and the third highest is Muslim (6.7%) • Half of all Muslims (50%) live in socially rented accommodation - 31 percentage points higher than the overall population (19%)

	<ul style="list-style-type: none"> • More than a third (36%) of all Jewish people of working age were economically inactive students compared to just 12% in the population as a whole • In council staff, 25.2% are Christian, 18.2% have another religion and 32.2% had no religion
Mitigations:	<p>Budget proposals related health, care and wellbeing, such as increasing reviews or supporting people with reablement in their homes should take into account differing needs because of people’s religion and belief (for example different requirements around diet, life events, and holidays). This should be factored into service-design. We will continue to work with faith-led organisations in the city to understand the emerging needs of faith groups.</p> <p>Council workforce efficiencies and changes may have a disproportionate impact on some faith groups as the category "Other religion or belief" is disproportionately represented at the lowest salary bracket of Council employees. The main City Hall and Temple St work sites have a multi-faith room, and we will continue to promote flexible working patterns wherever possible to accommodate faith holidays and prayer requirements etc.</p>
Marriage & civil partnership	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Existing issues and considerations	No impact identified at this stage.
Mitigations:	No impact identified at this stage.
OTHER RELEVANT CHARACTERISTICS	
Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	
Socio-Economic (deprivation)	<ul style="list-style-type: none"> • Due to the nature of the activity, there is a risk that budget proposals will have a disproportionate, negative impact on those from low-income households and those living in poverty • Bristol has 41 Lower Super Output Areas (LSOAs) in the most deprived 10% in England for Multiple Deprivation, including 3 LSOAs in the most deprived 1% in England (Deprivation, 2019) • The results from Bristol’s Quality of Life survey show that people from the most deprived areas in Bristol are less satisfied across a range of indicators (including, Health & Wellbeing, Crime & Safety, Education & Skills, Sustainability & Environment) compared with the cities average. Data showed: <ul style="list-style-type: none"> ○ the % households which have experienced severe food insecurity increased from 1.8% in 21-22 to 3.7% in 2022-23 ○ Those who experienced moderate to severe food insecurity rose from 4.6% (21-22) to 8.1% (22-23). ○ The % satisfied with the cost of heating their home was (down from 34.7% (21-22) to 21.6% (22-23). ○ People from the most deprived areas of Bristol are significantly less satisfied with their local areas as a place to live, compared to the cities average. ○ Rates of people whose day-to-day life is affected by fear of crime is nearly double in the most deprived areas of the city, compared to the cities average 32.4% / 17.4%.

	<ul style="list-style-type: none"> ○ People from the most deprived areas of Bristol are 27.4% less satisfied with their local area, compared to the cities average (47.8% / 75.2%). ○ 15.1% less people from the most deprived areas of Bristol feel they belong to their neighbourhood, compared to the cities average of 65.1%. ○ 26.3% of people from the most deprived areas of Bristol have low life satisfaction, compared to the cities average of 13.8%. A difference of 12.5%. ● Around 1 in 4 (24%) of adults who reported difficult in paying their energy bills in 2022 experienced moderate to severe depressive symptoms, which is nearly three times higher than those who found it easy to pay their energy bills (9% - ONS) ● In Bristol 15% of residents (72,300 people) live in the 10% most deprived 12 areas in England, including 17,900 children and 7,600 older people
Carers	<ul style="list-style-type: none"> ● Of all the carers in Bristol, almost a third (30%) were disabled themselves - this compares to just 17% of the population who do not provide unpaid carer to others ● In 2021 there were almost 34,000 people providing unpaid care in Bristol. This accounts for 7.6% of all people aged 5 years and over ● About 4 in 9 (45.3%) say caring responsibilities prevent them from leaving their home when they want to. ● Almost 1 in 7 (14.3%) are prevented from getting involved in their community due to accessibility issues. ● Nearly 1 in 11 (8.6%) are stopped from leaving home because of a lack of support and assistance and about 2 in 9 (23.0%) suggested they would visit venues and events more often if the venues were more accessible ● Almost 2 in 9 (21.7%) were victims of disability discrimination or harassment in last year.
Other groups [Please add additional rows below to detail the impact for any other relevant groups as appropriate e.g. asylum seekers and refugees; care experienced; homelessness; armed forces personnel and veterans]	
Potential impacts:	
Mitigations:	

3.2 Does the proposal create any benefits for people based on their protected or other relevant characteristics?

Outline any potential benefits of the proposal and how they can be maximised. Identify how the proposal will support our [Public Sector Equality Duty](#) to:

- ✓ Eliminate unlawful discrimination for a protected group
- ✓ Advance equality of opportunity between people who share a protected characteristic and those who don't
- ✓ Foster good relations between people who share a protected characteristic and those who don't

There is the potential for a positive equality impact with proposals related to children and education by increasing local specialist education provision, increasing the number of foster carers and having two new children's homes that are designed to support specific needs based on Disability status, supporting equality of opportunity. In addition, proposals related to using funding to support highways

maintenance should improve the quality road roads and footpaths, increasing safety for services users. We have considered as far as possible the need to: eliminate discrimination, harassment, victimisation and any other conduct prohibited under the Equality Act 2010; advance equality of opportunity between people from different groups; and foster good relations between people from different groups.

Our budget savings proposals are aligned to our [Corporate Strategy](#) and although we have limited resources our future focus will be on achieving those priorities we have identified, including tackling poverty and intergenerational inequality.

Step 4: Impact

4.1 How has the equality impact assessment informed or changed the proposal?

What are the main conclusions of this assessment? Use this section to provide an overview of your findings. This summary can be included in decision pathway reports etc.

If you have identified any significant negative impacts which cannot be mitigated, provide a justification showing how the proposal is proportionate, necessary, and appropriate despite this.

Summary of significant negative impacts and how they can be mitigated or justified:

The cumulative impact of our saving proposals is likely to have a disproportionate impact on people living in poverty / low-income families, and equalities groups particularly on the basis of age and disability. We will aim to mitigate this disproportionate impact as much as possible by prioritising and retaining statutory and targeted services which most benefit vulnerable groups.

Summary of positive impacts / opportunities to promote the Public Sector Equality Duty:

- Foster carer recruitment and retention
- Supporting Bristol's children's homes (this will help reduce the number of children placed in more expensive placements outside the city, and make sure children can stay close to local connections such as school, friends and family)
- Use Clean Air Zone funds to improve the highways network

4.2 Action Plan

Use this section to set out any actions you have identified to improve data, mitigate issues, or maximise opportunities etc. If an action is to meet the needs of a particular protected group, please specify this.

Improvement / action required	Responsible Officer	Timescale
All relevant EqIAs will be published on the Council's website and continue to be updated as appropriate.	Grace Biddulph	March 2024

4.3 How will the impact of your proposal and actions be measured?

How will you know if you have been successful? Once the activity has been implemented this equality impact assessment should be periodically reviewed to make sure your changes have been effective your approach is still appropriate.

Our Equality and Inclusion Annual Progress Reports show what we have done to achieve the aims of our Equality and Inclusion policy and strategy, and the progress we have made including reporting on all relevant Key Performance Indicators and workforce diversity - Equalities policy - bristol.gov.uk

Step 5: Review

The Equality and Inclusion Team need at least five working days to comment and feedback on your EqIA. EqIAs should only be marked as reviewed when they provide sufficient information for decision-makers on the equalities impact of the proposal. Please seek feedback and review from the [Equality and Inclusion Team](#) before requesting sign off from your Director¹.

Equality and Inclusion Team Review: <i>Reviewed by the Equality and Inclusion Team</i>	Director Sign-Off: Denise Murray
Date: 11/01/2023	Date: 16/01/2024

¹ Review by the Equality and Inclusion Team confirms there is sufficient analysis for decision makers to consider the likely equality impacts at this stage. This is not an endorsement or approval of the proposal.

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Introduction

Like other Councils, Bristol City Council continues to operate in a challenging environment, where cost to deliver services are escalating along with demand for those services, which affects our ability to continue all the activities we would like to in order to deliver the services that we want.

Councils faced reducing revenues as part of the government austerity programme for a decade between 2010-2019 and whilst there has been additional income since that point, that income has not maintained pace with overall levels of inflation and demand pressures that are being seen. This has meant that councils across the county, including Bristol, are facing increasing challenges in balancing the budget.

Based on our autumn forecasts in our Medium Term Financial Plan, we face a funding gap over the next five years, with a gap of £17.8 million in 2024/25, rising to a peak of £32.2 million during the 5 year planning period. This is in addition to the £17.7 million of savings and efficiencies for the 2024/25 – 2027/28 period that were outlined in the 2023/24 budget.

The following proposals will be presented to Cabinet on Tuesday 23rd January 2024. Cabinet will decide whether to recommend the budget to Full Council. If it does, Full Council will consider the budget for 2024/25 on Tuesday 20th February 2024.

The setting of a budget which includes these proposals does not guarantee that they will all happen. Some of these may be subject to further development, public consultation, and formal Cabinet decision making.

Proposals 2024/25 to 2028/29

The following list of proposals set out how we outline that the budget gap is bridged until March 2029.

These proposals cross the breadth of the council's services across a number of themes, but continue to closely align with our Corporate Strategy priorities.

Each proposal is presented with its forecast savings for each financial year up until 2028/29.

The list of proposals is shown in two sections so that proposals that may require further consultation can be reviewed separately to those that do not.

In section three there is a summary table that outlines our savings by category of approval and by directorate.

The amounts shown against each savings proposal are net of the costs and investments required to deliver the proposed savings. Where a negative figure is shown in a table, this indicates that either the saving is a one-off and non-recurrent or that the cost in that year to deliver the saving outweighs the amount saved during that time.

Status	
Previous Budget Reports	An unchanged proposal which was published as part of the Budget Reports prior to 2023/24
Budget Report 2023/24	An unchanged proposal which was published as part of the 2023/24 Budget Report
Budget Report 2023/24 (Changed)	A proposal which was published as part of the 2023/24 Budget Report but has had its description or savings amounts changed
Budget Consultation Dec 2023 for 2024/25 Budget	An unchanged proposal which was published as part of the 2024/25 - 2028/29 Budget consultation
Budget Consultation Dec 2023 for 2024/25 Budget (Changed)	A proposal which was published as part of the 2024/25 - 2028/29 Budget Consultation but has had its description or savings amounts changed
Budget Recommendation 2024/25 (New Since 2023 consultation)	A new proposal now being published following the 2024/25 - 2028/29 Budget Consultation

Section 1: Proposals that may be subject to consultation

These proposals are ideas based upon several items that we consulted citizens about at the end of 2022. Many of these will need more work to shape the proposals and confirm if they can go ahead. At this early stage we think it is likely that they will require further public consultation and assessment before final decisions can be made. This may change however as proposals are developed in more detail and we will keep this under review.

Directorate	Savings Ref	Cabinet Lead	Proposals	24/25 £000	25/26 £000	26/27 £000	27/28 £000	28/29 £000	Total £000	Status*
Growth & Regeneration	2324-NEW5	Cllr Don Alexander	New parking charges New charges for small district car parks.	150	-	-	-	-	150	Budget Report 2023/24
Growth & Regeneration	NEW 2223_GR021	Cllr Ellie King	Secure new commercial opportunities through the Bristol Future Parks approach Generate new income for Parks and Green Spaces.	50	-	-	-	-	50	Previous Budget Reports
Growth & Regeneration	NEW 2223_GR022	Cllr Ellie King	Maximise commercial opportunities for catering outlets within parks Continue to grow the catering and nursery businesses with Parks and Green Spaces.	25	-	-	-	-	25	Previous Budget Reports
Adults, Community & Public Health	2324-P7	Cllr Helen Holland	Concord Lodge To review and develop a more efficient and effective delivery model at Concord Lodge.	104	-	-	-	-	104	Budget Report 2023/24
Children's & Education	2324-P15	Cllr Asher Craig	Social worker retention and recruitment Increase retention of our experienced social workers so that we can reduce our spend on agency temporary social workers.	220	245	-	-	-	465	Budget Report 2023/24
Resources (& Shareholding)	2324-R30	Cllr Craig Cheney	Discretionary Rate Relief (#2) Robustly administer the existing discretionary business rates relief policy ensuring that discretionary business rates relief is only paid to those organisations set out in the policy as eligible.	200	-	-	-	-	200	Budget Report 2023/24

Directorate	Savings Ref	Cabinet Lead	Proposals	24/25 £000	25/26 £000	26/27 £000	27/28 £000	28/29 £000	Total £000	Status*
Adults, Community & Public Health	NEW 2223_ASC1	Cllr Helen Holland	Increase social housing for people with care and support needs Better Lives at Home is an innovative transformation programme for adult social care which supports people to lead more fulfilling lives and live independently in their own homes for longer. It boosts usage of TEC (technology enabled care). TEC equipment can be used at home to remain independent.	870	550	468	-	-	1,888	Previous Budget Reports
Growth & Regeneration Page 294	2324-GR7_updated	Cllr Tom Renhard / Cllr Nicola Beech / Mayor	Temporary Accommodation need We will reduce the costs of providing temporary accommodation to those with immediate housing needs. We will do this by creating new temporary accommodation, making use of existing properties, including council housing, and working with partners to source available properties. This will reduce our spend on expensive and inappropriate accommodation like hotels.	821	-	-	-	-	821	Budget Report 2023/24
Adults, Community & Public Health	2324-P6	Cllr Helen Holland	East Bristol Intermediate Care Centre Following a recent review it is proposed to offer East Bristol Intermediate Care Centre to alternative providers, or close the centre. The centre provides care and accommodation for 17 people over the age of 18 who stay for up to six weeks to help them to be independent after a hospital admission or illness. This is a discretionary service offered by the council.	834	-	-	-	-	834	Budget Report 2023/24
Adults, Community & Public Health	NEW 2223_ASC7	Cllr Helen Holland	Review Bristol Community Links service delivery Review of Day Opportunities. Subject to consultation.	500	-	-	-	-	500	Previous Budget Reports

Directorate	Savings Ref	Cabinet Lead	Proposals	24/25 £000	25/26 £000	26/27 £000	27/28 £000	28/29 £000	Total £000	Status*
Children's & Education	2324-NEW2	Cllr Asher Craig	Targeted Commissioning Review and reduce spend on direct commissioning for Mentoring/Youth services, with a focus on maximising delivery outcomes through alternative routes, such as application of the Youth Zone.	200	-	-	-	-	200	Budget Report 2023/24
Children's & Education	2324-NEW3	Cllr Asher Craig	Short Breaks Review and reduce pooled budget spend by 10%. This will require further consultation and represents a change to S75 budget.	270	-	-	-	-	270	Budget Report 2023/24
Children's & Education	2324-P11	Cllr Asher Craig	Foster carer recruitment and retention Supporting Fostering Services to recruit and retain foster carers, with innovative approaches and strategies to encourage and support people with the right skills and experience, to come forward and offer some of our most vulnerable children an opportunity to experience a stable family life. This proposal would significantly increase our cohort of local foster carers and reduce the use of more expensive distant placements and the use of Independent fostering agencies.	1,284	614	251	293	-	2,442	Budget Report 2023/24
Children's & Education	2324-P21	Cllr Asher Craig	Home to Education Transport Redesign the service to provide a more efficient needs-led Statutory Home to School Transport Service, developing more sustainable travel options, including independent travel, for young people with Special Educational Needs and Disability aged 16–25.	2,270	130	192	254	-	2,846	Budget Report 2023/24 (Changed)

Directorate	Savings Ref	Cabinet Lead	Proposals	24/25 £000	25/26 £000	26/27 £000	27/28 £000	28/29 £000	Total £000	Status*
Children's & Education	2324-P23a	Cllr Asher Craig	<p>Early Help in communities, including Children's Centres and Family Hubs</p> <p>We are proposing to review how we provide Early Help in communities, including children's centres and family hubs. The aim is to bring together more services that can be delivered from a range of different local venues and increase the amount of outreach work and online support we are able to provide, reducing the spend on buildings and staffing costs.</p>	-	150	-	-	-	150	Budget Report 2023/24 (Changed)
Children's & Education Page 296	2324-P25	Cllr Asher Craig	<p>Bristol Children's Homes</p> <p>We will increase our available capacity of council run children's homes. This will help us to try and reduce the number of children who are placed in expensive placements outside of the city, improving outcomes whilst reducing our overall expenditure.</p>	300	-	-	-	-	300	Budget Report 2023/24
Children's & Education	NEW 2223_CF6b.1	Cllr Asher Craig	<p>Review special guardianship order arrangements</p> <p>Improve special guardianship arrangements to ensure payments are aligned with national guidance.</p>	-	30	-	-	-	30	Previous Budget Reports
Growth & Regeneration	NEW 2223_GR028	Cllr Craig Cheney	<p>Review Museums and Archive Service</p> <p>Review of the Museums and Archive Service in order to deliver the Corporate Strategy and to deliver savings.</p>	258	-	-	-	-	258	Previous Budget Reports
Resources (& Shareholding)	2324-R29	Cllr Craig Cheney	<p>Discretionary Rate Relief (#1)</p> <p>Suspend the council's discretionary rate relief scheme and the discretion to 'top-up' relief to 100% of the business rates due, following the required 12 months' notice period. Eligible registered charities and other voluntary and community organisations will be restricted to mandatory relief of 80%.</p>	170	-	-	-	-	170	Budget Report 2023/24

Section 2: Proposals where no consultation is required

We don't believe that the proposals in this section will require further public consultation. The reasons for this will vary by proposal, but it will typically be because there is little or no noticeable frontline impact on the services people receive. This may change however as proposals are developed in more detail and we will keep this under review.

Directorate	Savings Ref	Cabinet Lead	Proposals	24/25 £'000	25/26 £'000	26/27 £'000	27/28 £'000	28/29 £'000	Total £'000	Status*
Corporate	24/25-GR007	Cllr Alexander	<p>Alternative investment in sustainable transport</p> <p>We would use net proceeds from Clean Air Zone charges to contribute to the amount of money we pay to the West of England Combined Authority for the annual Transport Levy which supports the Local Transport Plan, funding concessionary fares and other public transport related services.</p>	10,300	(4,000)	-	-	-	6,300	Budget Consultation Dec 2023 for 2024/25 Budget (Changed)
Growth & Regeneration	2324-GR15	Cllr Don Alexander	<p>Transport and Highway Maintenance</p> <p>Access alternative income sources (some of which may be one-off) to pay for routine maintenance and improvements to sustainable transport and air quality to help improve health.</p>	(500)	(500)	-	-	-	(1,000)	Budget Report 2023/24
Growth & Regeneration	24/25-GR001	Cllr Beech	<p>Keep more of the administration fee from the Community Infrastructure Levy</p> <p>The Community Infrastructure Levy (CIL) is money collected from new developments and used to fund local infrastructure.</p> <p>We would use the 5 per cent of this levy allocated to administration to replace money from the general fund (the council's main revenue account). This would be used to fund staff time spent supporting CIL work.</p>	150	(50)	(50)	-	-	50	Budget Consultation Dec 2023 for 2024/25 Budget

Directorate	Savings Ref	Cabinet Lead	Proposals	24/25 £'000	25/26 £'000	26/27 £'000	27/28 £'000	28/29 £'000	Total £'000	Status*
Growth & Regeneration	24/25-GR003	Cllr Alexander	<p>Use e-scooter payments for highway maintenance</p> <p>Use new income from e-scooter operator payments to fund highway maintenance. This new income could also be used to support the use of bikes and e-scooters in the city.</p>	500	-	-	-	-	500	Budget Consultation Dec 2023 for 2024/25 Budget
Growth & Regeneration	24/25-GR010	Cllr Alexander	<p>Use Clean Air Zone funds to maintain and improve the highways network</p> <p>We would use net proceeds from Clean Air Zone charges to carry out repairs and improvement works on the city's roads and footpaths. These works would support the Local Transport Plan by keeping our roads and footpaths safe for all users, encouraging walking and cycling and reducing traffic congestion.</p>	2,311	(1,148)	-	-	(1,163)	-	Budget Consultation Dec 2023 for 2024/25 Budget
Growth & Regeneration	NEW 2223_GR013	Cllr Don Alexander	<p>Continue with the enforcement of the Bristol Bridge restrictions</p> <p>Penalty Charge Notices from bus lane enforcement at Bristol Bridge.</p>	(300)	-	-	-	-	(300)	Previous Budget Reports
Resources (& Shareholding)	24/25-R002	Cllr Cheney	<p>Register Office</p> <p>We would raise Register Office prices for 2024/25 in line with current market rates, including fees to hold a ceremony, for our registrars to attend, to license a venue, for couples to hold a date and for other event hire.</p>	76	-	-	-	-	76	Budget Consultation Dec 2023 for 2024/25 Budget

Directorate	Savings Ref	Cabinet Lead	Proposals	24/25 £'000	25/26 £'000	26/27 £'000	27/28 £'000	28/29 £'000	Total £'000	Status*
Resources (& Shareholding)	2324-R12	Cllr Craig Cheney	IT Contracts Review all of our spending on IT software and services across the entire council. Seek to reduce or cancel any non-essential contracts and services.	310	-	-	-	-	310	Budget Report 2023/24 (Changed)
Adults, Community & Public Health	24/25-A001	Cllr Helen Holland	Ensure all homecare packages provide the right support We would review more people who receive care and support in their home and have not had a social care review within the last year, to ensure they receive the amount and type of care and support that is appropriate to their needs and are enabled to be as independent as possible. For example, by enabling people's independence through the use of technology and / or equipment we would spend less on direct care and support provided by our teams. Reviews would be based on an individuals' personal strengths, including their social and community networks, in order to promote their wellbeing and independence.	600	-	-	-	-	600	Budget Consultation Dec 2023 for 2024/25 Budget
Adults, Community & Public Health	24/25-A003	Cllr Helen Holland	Review contract management with residential and nursing care providers We would improve the way we pay external organisations to provide residential and nursing care services on our behalf, to ensure the services we provide are funded fairly, are affordable and represent good value. This better management of contracts and expenditure will enable us to spend less while providing the same level and quality of service to people who need residential or nursing care services.	675	-	-	-	-	675	Budget Consultation Dec 2023 for 2024/25 Budget

Directorate	Savings Ref	Cabinet Lead	Proposals	24/25 £'000	25/26 £'000	26/27 £'000	27/28 £'000	28/29 £'000	Total £'000	Status*
Page 300	24/25-A004	Cllr Helen Holland	<p>Review contract management with providers of care and support to young people transitioning from children's services</p> <p>We would improve the way we pay external organisations to provide care and support to young people who have transitioned from children's services, to ensure the services we provide are funded fairly, are affordable and represent good value. This better management of contracts and expenditure will enable us to get better value while providing the same level and quality of service to people who need care and support to access employment, independent living, community and wellbeing services.</p>	1,148	383	-	-	-	1,531	Budget Consultation Dec 2023 for 2024/25 Budget
	24/25-A006	Cllr Helen Holland	<p>Increase reviews of care and support plans</p> <p>Increase the number of care and support plans which have been reviewed by a social care practitioner within the last year. This will be achieved by improving systems to identify and complete timely reviews and where possible, support approaches which focus on an individuals' personal strengths including social and community networks in order to promote their wellbeing and independence.</p>	630	210	-	-	-	840	Budget Consultation Dec 2023 for 2024/25 Budget

Directorate	Savings Ref	Cabinet Lead	Proposals	24/25 £'000	25/26 £'000	26/27 £'000	27/28 £'000	28/29 £'000	Total £'000	Status*
Adults, Community & Public Health	24/25-A007	Cllr Helen Holland	<p>Improve Reablement</p> <p>We would improve the way Reablement Teams work so that more people would be able to receive Reablement. This would mean that more people go on to achieve improved independence, resulting in the need for less care and therefore reduced costs.</p> <p>Reablement helps individuals to learn or re-learn the skills necessary to be able to engage in activities or occupations that are important to them.</p>	938	313	-	-	-	1,251	Budget Consultation Dec 2023 for 2024/25 Budget
Adults, Community & Public Health 301	24/25-A008	Cllr Helen Holland	<p>Increase reviews of those receiving Section 117 aftercare</p> <p>More people who receive Section 117 Mental Health aftercare services (free help and support provided to those after they leave hospital having been detained there under the Mental Health Act) are reviewed within one year of them leaving hospital.</p> <p>This would support and improve independence, resulting in the need for less care and therefore reduced costs.</p>	1,350	450	-	-	-	1,800	Budget Consultation Dec 2023 for 2024/25 Budget
Adults, Community & Public Health	24/25-A009	Cllr Ellie King	<p>Communities programme</p> <p>This budget supports the capacity of the city council's community development team.</p> <p>To make this saving we would not deliver any new community development programmes in 2024/25 (subject to consultation where required). Current ongoing initiatives will continue.</p>	75	-	-	-	-	75	Budget Consultation Dec 2023 for 2024/25 Budget

Directorate	Savings Ref	Cabinet Lead	Proposals	24/25 £'000	25/26 £'000	26/27 £'000	27/28 £'000	28/29 £'000	Total £'000	Status*
Children's & Education	24/25-CEN 001a	Cllr Craig Cheney	Review fees and charges Review and realign the budgets for fees and charges across sources of income that have repeatedly outperformed their approved budgets in recent years.	116	-	-	-	-	116	Budget Consultation Dec 2023 for 2024/25 Budget (Changed)
Growth & Regeneration	2324-GR2.1	Cllr Don Alexander	City Transport discretionary activities Reduce the City Transport budget by focussing on statutory areas and making reductions in discretionary activities, including transport studies, and reviewing our approach to income and expenditure on bus-shelters and bus-stops.	(70)	-	-	-	-	(70)	Budget Report 2023/24
Growth & Regeneration	24/25-CEN 001b	Cllr Craig Cheney	Review fees and charges Review and realign the budgets for fees and charges across sources of income that have repeatedly outperformed their approved budgets in recent years.	479	-	-	-	-	479	Budget Consultation Dec 2023 for 2024/25 Budget (Changed)
Growth & Regeneration	24/25-GR002	Cllr Alexander	Charge more for City Transport work We would use income from externally funded projects, where appropriate, to charge for staff time, and replace income from the general fund (the council's main revenue account). Make sure all charges for work are accurately recorded and job vacancies are filled.	250	-	-	-	-	250	Budget Consultation Dec 2023 for 2024/25 Budget

Directorate	Savings Ref	Cabinet Lead	Proposals	24/25 £'000	25/26 £'000	26/27 £'000	27/28 £'000	28/29 £'000	Total £'000	Status*	
Page 30	Growth & Regeneration	24/25-GR005	Cllr Renhard	Fund the Head of Housing Delivery role differently The Head of Housing Delivery is currently funded by the general fund (the council's main revenue account). Due to the nature of the work, we would seek to fund 50 per cent of this position through the Housing Revenue Account (HRA). The HRA is funded by tenants' rents and leasehold service charges, and funds can only be used for services to tenants and leaseholders and the delivery of new homes. Given that the Head of Housing Delivery will oversee the planned increase in housing delivery it is appropriate that this role be part funded by the HRA.	52	-	-	-	-	52	Budget Consultation Dec 2023 for 2024/25 Budget
	Growth & Regeneration	24/25-GR008	Cllr Alexander	Local Transport schemes We would use net proceeds from Clean Air Zone charges to cover the costs of local transport schemes which support the Local Transport Plan such as yellow lines, crossings, dropped kerbs including staff costs.	350	-	-	-	-	350	Budget Consultation Dec 2023 for 2024/25 Budget
	Resources (& Shareholding)	2324-R2	Cllr Craig Cheney	Democratic Engagement Review of democratic engagement staffing structures in the context of the change to council governance.	50	-	-	-	-	50	Budget Report 2023/24
	Resources (& Shareholding)	24/25-CEN 001c	Cllr Craig Cheney	Review fees and charges Review and realign the budgets for fees and charges across sources of income that have repeatedly outperformed their approved budgets in recent years.	30	-	-	-	-	30	Budget Consultation Dec 2023 for 2024/25 Budget (Changed)

Directorate	Savings Ref	Cabinet Lead	Proposals	24/25 £'000	25/26 £'000	26/27 £'000	27/28 £'000	28/29 £'000	Total £'000	Status*
Resources (& Shareholding)	24/25-R001	Cllr Cheney	Annual leave purchase scheme We would raise income by offering an additional opportunity for employees to buy extra leave. Managers will consider requests carefully, in relation to business needs and the potential impact of additional leave on the service.	75	-	-	-	-	75	Budget Consultation Dec 2023 for 2024/25 Budget
Children's & Education	2324-P23c	Cllr Asher Craig	Early Help in communities, including Children's Centres and Family Hubs We are proposing to review how we provide Early Help in communities, with this element looking specifically at children's centres and the system change around asset management. The aim is to bring together more services that can be delivered from a range of different local venues and increase the amount of outreach work and online support we are able to provide, reducing the spend on buildings and staffing costs.	250	-	-	-	-	250	Budget Report 2023/24 (Changed)
Children's & Education	24/25-CE002	Cllr Asher Craig	Bristol's children's homes Increase the number of council run children's homes. This will help us reduce the number of children placed in more expensive placements outside of the city, and make sure children can stay close to local connections, such as school, friends and family.	(597)	936	28	-	29	396	Budget Consultation Dec 2023 for 2024/25 Budget
Children's & Education	24/25 ITS 1/8/10	Cllr Asher Craig	Fostering Sufficiency Increase the range and choice of available placements for children locally by implementing a scheme for home extensions and adaptations.	-	159	159	-	-	317	Budget Recommendation 2024/25

Directorate	Savings Ref	Cabinet Lead	Proposals	24/25 £'000	25/26 £'000	26/27 £'000	27/28 £'000	28/29 £'000	Total £'000	Status*
Children's & Education	24/25-ITS 2/3/ 4/5/7	Cllr Asher Craig	Children's Homes Sufficiency Investment in residential properties and / or larger residential multi-functional properties to enable more appropriate placements for older children.	-	390	570	-	-	960	Budget Recommendation 2024/25
Growth & Regeneration	24/25-GR009	Cllr Renhard	Increase direct lets with Private Sector Landlords for Temporary Accommodation We would reduce our reliance on our most expensive privately managed Temporary Accommodation, by renting properties direct from landlords. This would reduce costs associated with providing Temporary Accommodation. The council has a statutory duty to provide accommodation to people who are homeless, and either reach our vulnerability thresholds, or have dependent children, and where it hasn't been possible to prevent homelessness.	405	810	810	810	810	3,645	Budget Consultation Dec 2023 for 2024/25 Budget
Growth & Regeneration	NEW 2223_GR039	Cllr Craig Cheney	Reduce grant to Bristol Music Trust Reduction of grant to Bristol Music Trust after substantial investment and opening of Bristol Beacon.	276	501	-	-	-	777	Previous Budget Reports
Resources (& Shareholding)	24/25-R003	Cllr Cheney	Professional services We have procured a contract with Constellia to deliver the council's professional services (including consultancy) requirements. Any secured contract delivered by Constellia will earn a 0.2% rebate which will be returned to the council annually.	33	-	-	-	-	33	Budget Consultation Dec 2023 for 2024/25 Budget

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Directorate	Savings Ref	Cabinet Lead	Proposals	24/25 £'000	25/26 £'000	26/27 £'000	27/28 £'000	28/29 £'000	Total £'000	Status*
Adults, Community & Public Health	24/25-A005	Cllr Helen Holland	<p>Review housing related support</p> <p>Review how we would provide the support which helps people stay living independently in their homes. By undertaking Care Act eligibility assessments for people who receive this service, we would ensure that we maintain support for those who are eligible in line with the Care Act 2014.</p>	1,785	-	-	-	-	1,785	Budget Consultation Dec 2023 for 2024/25 Budget
Children's & Education	2324-NEW4	Cllr Asher Craig	<p>Pooled Budgets</p> <p>Enable a one-off refund of pooled budgets.</p>	(100)	-	-	-	-	(100)	Budget Report 2023/24
Children's & Education	2324-P23b	Cllr Asher Craig	<p>Early Help in communities, including Children's Centres and Family Hubs - Transformation and redesign element</p> <p>Where we are proposing review of Early Help provision in communities there is a system change opportunity to redesign the operating model and offer within that process of review. The aim is to bring together more services that can be delivered from a range of different local venues and increase the amount of outreach work and online support we are able to provide, reducing the spend on buildings and staffing costs.</p>	802	-	-	-	-	802	Budget Report 2023/24 (Changed)

Directorate	Savings Ref	Cabinet Lead	Proposals	24/25 £'000	25/26 £'000	26/27 £'000	27/28 £'000	28/29 £'000	Total £'000	Status*
Children's & Education	24/25-CE001	Cllr Asher Craig	<p>Foster carer recruitment and retention</p> <p>Implement an extended family peer support model for foster carers, including regular joint planning, training, and social activities. This is an alternative way of providing foster care, and the success has been evidenced nationally in attracting prospective carers and retaining our existing experienced carer community. This will improve the stability of fostering placements and strengthen the relationships between carers, children and young people, fostering services and birth families.</p>	100	133	33	-	-	266	Budget Consultation Dec 2023 for 2024/25 Budget
	24/25-CE003	Cllr Asher Craig	<p>New operating model for Children and Education directorate</p> <p>We would apply this new model to enable us to better meet the demands while making the service more financially sustainable long term and enabling improved quality, retention and partnership working.</p>	200	400	400	-	-	1,000	Budget Recommendation 2024/25
	NEW 2223_CF6b.2	Cllr Asher Craig	<p>Transformation redesign</p> <p>Delivery through the wider Our Families Transformation programme through better demand management, process automation, improved commissioning, including new operating model (approved at Cabinet).</p>	-	93	-	-	-	93	Previous Budget Reports

Directorate	Savings Ref	Cabinet Lead	Proposals	24/25 £'000	25/26 £'000	26/27 £'000	27/28 £'000	28/29 £'000	Total £'000	Status*
Growth & Regeneration	24/25-GR004	Cllr Cheney	<p>Reduce spend on Bristol Legible City</p> <p>We would spend less money on the Bristol Legible City project. This means signage and wayfinding information that help people navigate the city would be updated less frequently and may not always have the latest information about new developments or transport. This may impact residents and visitors accessing the city centre.</p>	60	-	-	-	-	60	Budget Consultation Dec 2023 for 2024/25 Budget
Growth & Regeneration	24/25-GR006	Cllr Renhard	<p>Create two new property licensing schemes</p> <p>If new property licensing schemes are introduced following the current consultation process, we would increase income by introducing two new property licensing schemes. This new income would be used to expand the council's Private Housing team and cover the costs of running the service. Put link to current consultation here.</p>	330	330	-	-	-	660	Budget Consultation Dec 2023 for 2024/25 Budget
Resources (& Shareholding)	2324-R11	Cllr Craig Cheney	<p>City Innovation Team</p> <p>Cease all activities and delete the City Innovation Team (which focuses on discretionary projects such as digital and smart city innovations).</p>	76	-	-	-	-	76	Budget Report 2023/24
Resources (& Shareholding)	2324-R16	Cllr Craig Cheney	<p>Networking, partnership and influence services</p> <p>Review and possibly reduce or stop some services that focus on partnership working at home and abroad. This includes our work with national and international networks which focus on the role of elected Mayors.</p>	90	160	-	-	-	250	Budget Report 2023/24

Directorate	Savings Ref	Cabinet Lead	Proposals	24/25 £'000	25/26 £'000	26/27 £'000	27/28 £'000	28/29 £'000	Total £'000	Status*
Resources (& Shareholding)	2324-R18	Cllr Craig Cheney	Workforce and Change service Restructure the council's HR, Change and Learning and Development functions to support a smaller organisation, with a further redesign in 2026/27 following the implementation of the council's change programme.	-	-	150	-	-	150	Budget Report 2023/24
Resources (& Shareholding)	2324-R22	Cllr Craig Cheney	Debt collection outreach Reduce the temporary funding to the debt outreach programme, which worked with individuals in debt to the council, and instead improve sign-posting to specialist providers of debt advice in the city.	(100)	-	-	-	-	(100)	Budget Report 2023/24
Resources (& Shareholding)	2324-R7	Cllr Craig Cheney	Mayor's Office Reduce the amount of money we spend on staff and activities performed by the Mayor's Office with a deletion of this function from 2024–25 (upon the end of the Mayoral term) and identify opportunities for reductions in 2023–24.	425	-	-	-	-	425	Budget Report 2023/24
Resources (& Shareholding)	2324-R9	Cllr Craig Cheney	IT Service Reduce the amount of money we spend on staff by restructuring and reducing our internal ICT service.	290	-	-	-	-	290	Budget Report 2023/24 (Changed)

Directorate	Savings Ref	Cabinet Lead	Proposals	24/25 £'000	25/26 £'000	26/27 £'000	27/28 £'000	28/29 £'000	Total £'000	Status*
Resources (& Shareholding)	24/25-R004	Cllr Cheney	<p>Reduce spend on discretionary areas of Learning and Development</p> <p>By reviewing and focusing our spend in this area we would be required to prioritise funding for statutory or mandatory training and areas of organisational priority, to enable a reduction to the Learning and Development offered across the organisation.</p>	50	-	-	-	-	50	Budget Recommendation 2024/25
Adults, Community & Public Health P08310	24/25-A002	Cllr Helen Holland	<p>Reduce the number of longer term care packages by increasing the frequency of reviews following a hospital visit</p> <p>Where people have moved from hospital into residential or nursing care, we would increase the number of reviews carried out at six and twelve weeks following discharge from hospital. This will allow us to revise care packages and/or cease those that are no longer needed to ensure people receive care and support that is appropriate to their needs, while their independence continues to be supported and promoted."</p>	1,500	-	-	-	-	1,500	Budget Consultation Dec 2023 for 2024/25 Budget

Section 3: Summary tables

Summary table outlining savings proposals by category of approval and consultation:

	24/25 £'000	25/26 £'000	26/27 £000	27/28 £'000	28/29 £'000	Total £'000
Previous Budget Reports	1,679	1,174	468	-	-	3,321
Budget Report 2023/24	4,424	519	401	293	-	5,637
Budget Report 2023/24 <i>(Changed)</i>	3,922	280	192	254	-	4,648
TOTAL PREVIOUS BUDGETS	10,025	1,973	1,061	547	-	13,606
Budget Consultation Dec 2023 for 2024/25 Budget	23,096	(1,633)	821	810	(324)	22,770
Budget Consultation Dec 2023 for 2024/25 Budget <i>(Changed)</i>	625	-	-	-	-	625
Budget Recommendation 2024/25 <i>(New Since 2023 consultation)</i>	250	949	1,129	-	-	2,327
TOTAL 2024/25 BUDGET	23,971	(685)	1,950	810	(324)	25,722
GRAND TOTAL	33,996	1,289	3,011	1,357	(324)	39,328

Summary table by directorate:

	24/25 £'000	25/26 £'000	26/27 £000	27/28 £'000	28/29 £'000	Total £'000
Adults, Community & Public Health	11,009	1,906	468	-	-	13,383
Children's & Education	5,315	3,280	1,633	547	29	10,803
Growth & Regeneration	5,597	(57)	760	810	(353)	6,757
Resources (& Shareholding)	1,775	160	150	-	-	2,085
Corporate	10,300	(4,000)	-	-	-	6,300
TOTAL SAVINGS	33,996	1,289	3,011	1,357	(324)	39,328

1. Long Term Investments / Shareholdings

- 1.1 The council has a range of long-term investments and shareholdings which it wholly owns or in which it has a material interest. In relation to the wholly owned companies, these are complex businesses and when entering any long-term investments such as these it is important to assess market conditions and to acknowledge that the industries are ever-changing and as such will always be subject to external influences, volatilities and risks. The financial performance of these companies and their assets and liabilities is regularly reviewed to ensure that there is no unexpected financial implication for the council in future years.
- 1.2 Bristol Holding Group currently includes the following subsidiaries:
- Bristol Waste Company Ltd
 - Goram Homes Ltd
- 1.3 The council is part of the following joint venture partnerships:
- City Leap Partnership Limited
- 1.4 The council budget provides the shareholder investment context. It reflects the council's associated financial committed reserves and establishes the capital and revenue cash limits considered sufficient to meet business needs.
- 1.5 The maximum level of exposure of the council to loans / liabilities (including deferred capital receipts) in its subsidiaries is set out in the council's Capital Strategy approved by Full Council on 31 October 2023. The level is set at the lower of either 10% of the council's general fund capital financing requirement or £70 million and the latest assessment is that this level will not be reached as part of the 2024/25 business planning process.
- 1.6 The process for preparation of the companies' annual business plans allows for appropriate governance and scrutiny. These plans are in the process of being refreshed / developed and will reflect the funding parameters approved for 2024/25. These will be submitted separately to Cabinet for consideration.

2. Bristol Holding Limited (BHL)

- 2.1 Bristol Holding Limited is wholly owned by the council and is an intermediate holding company for investments in Bristol Waste Company and Goram Homes. Its principal role is to protect the interest of the shareholder by ensuring effective governance of the council's portfolio of trading companies and supporting delivery of activities.
- 2.2 The council holds £37.153 million share capital investment in BHL (£36.55m of Ordinary shares and £0.603 million of redeemable Preference shares). The ordinary shares relate to the legacy investment in Bristol Energy Limited which is dormant and in the process of being wound up, with the Council's investment being fully provided as set out in the Council's financial statements.

There are currently no loan agreements between Bristol City Council and BHL. The gross budget assumed for 2024/25 is £0.3 million and this is fully recharged to Bristol Waste Company and Goram Homes. This budget reflects a lean operating model where functions have been transferred to the council with time spent by council employees expected to be charged back to BHL. The budget assumes staff costs consist of three roles, including a chair, a part-time executive lead and a part time administrator. If the council commissions work through BHL which is additional to that budgeted, then BHL's operating model enables them to recover such costs where appropriate or in the form of a fee via management recharges to the subsidiary companies.

- 2.3 BHL currently holds £1 Ordinary share capital in each of Bristol Waste and Goram Homes.

3. Bristol Waste Company (BWC)

Bristol Waste Company is a Teckal company, wholly owned by the council and provides the council's waste and street cleaning services (its municipal waste business) as well as providing commercial services and workplace/facilities management services. The council has 2 main contracts with BWC:

- Waste Services
- Facilities Management (FM).

Waste Services

- 3.1 This is the BWC contract with the council for its core (Teckal) service. The contract includes a payment mechanism (paymech) based on actual cost (and open book accounting, in order to achieve best value for the use of public funds) plus % approach. This is calculated annually according to unavoidable cost, market volatilities (for example for recyclates) and a mechanism for efficiencies and cost savings to be returned to the council under the contract. The cost plus approach allows for +14% overhead as set in 2022/23 Budget preparation with a 3 year review period.
- 3.2 This approach ensures the council pays appropriately for actual activity commissioned and eliminates variations in estimates in the business planning process due to financial and economic conditions which change over time coupled with over optimism at the outset.
- 3.3 The paymech represents a risk / reward arrangement between the council and BWC when dealing with Waste in-year contract variations only and is calculated as follows:
- The variance is defined as the difference between Teckal Waste (direct) cost + 14% mark-up and Teckal Waste revenue contract as outlined in paragraph 3.5 below.
 - The paymech is stacked.
 - i. any variance within +/- £0.250 million will be 100% met by BWC
 - ii. variances of up to a further +/- £0.250 million – 100% the council
 - iii. any further variance above +/- £0.500million is shared between the

council and BWC in the percentage split of council 30%: BWC 70%.

- Illustration based on £1.0million verified in year variance post open book reconciliation would equate to BWC £0.600million and council £0.400million.

- 3.4 A small reserve is held and movement +/- is applied to this fund during the paymech period to reset. An uplift of £1 million will be applied to this reserve in 2024/25 to be managed over the medium term.
- 3.5 The council's 2024/25 budget for its core waste services (Teckal activity) is £46.6 million. This includes a £2.1 million increase from 2023/24 budget in line with the council's assumed budget increase for inflation and £1.8 million budget increase to reflect the pressure in relation to increased municipal waste costs.

	2023/24 Budget £m	Inflation 2024/25 £m	Additional Funding £m	2024/25 Budget £m
Waste – Core Contract - Indexed	29.6	1.5		31.1
Waste – West of England- Indexed	13.1	0.6		13.7
Waste – Other Growth / Pressures			1.8	1.8
Total	42.7	2.1	1.8	46.6

- 3.6 Due to current levels of inflation and other economic pressures, in order to remain within the funding envelope set by the council above, BWC put forward proposals on savings and an increase in charges which came into effect from 2023/24; £0.7 million of additional income (included in the council's budget) is expected to be generated via the council and transferred across. To mitigate the risk of this income not being achieved, the income position will be reconciled as part of the paymech process at the end of the year.
- 3.7 The council had previously approved repayable loan facilities of £12 million to BWC for fleet vehicle replacement (Cabinet 4 December 2018) and £2.8 million for Phase 2 of the Avonmouth site redevelopment (Cabinet 26 January 2021). No further loan requests are anticipated and therefore none are included in the council's budget proposal for 2024/25.
- 3.8 Of the £12 million for fleet vehicle replacement, £11.3 million has been borrowed. In line with contractual payment terms, £5.3 million (the principal) had been repaid at December 2023. This leaves £6.0 million to be repaid in full plus interest by November 2028.
- 3.9 A contract for the £2.8 million loan facility for Phase 2 of the Avonmouth site redevelopment was signed in 2021. Again, this agreement includes an interest charge on the principal sum. Drawdowns from this facility commenced in January 2024 within an initial draw down of £1 million. The balance of £1.8 million is forecast to be drawn down in 2024/25. BWC indicates that the total cost for the Avonmouth site redevelopment will be £5.4 million with the balance over and above the £2.8 million to be funded from their cash reserves.

Facilities Management (FM)

- 3.10 The council entered a 4 year contract with BWC for Integrated Workplace & Facilities Management Services (Soft FM) for the council estate which started on 1 June 2021 to deliver a range of 'Soft FM' services including internal & external cleaning, security, waste, consumables, service management and co-ordination.
- 3.11 This is a contract for services with the main aim of finding savings and efficiencies for the council as reflected in the annual pricing structure in the table below (table reflects contract years and not financial years). The council's FM cleaning and security staff were TUPE'd across to BWC (142 Full Time Equivalent (FTE) positions).

	Council Baseline 2020/21 Outturn £m	Year 1 £m	Year 2 £m	Year 3 £m	Year 4 £m	Year 5 £m
Annual Cost	6.0	5.8	5.5	5.3	5.2	5.1
Annual Efficiencies		0.1	0.3	0.2	0.1	0.1
Cumulative Efficiencies		0.1	0.5	0.6	0.8	0.9

- 3.12 The pricing structure is forecast on year one baseline figures which do not include inflation. Inflationary increases will need to ensure that if the absolute value of BWC's annual pay increase exceeds the absolute value which the council would have awarded the cleaning and security staff had they remained with the council, then BWC must absorb that difference.
- 3.13 The 2024/25 budget for this service is £5.4 million, which includes the provision made by the council to fund the pay implications of TUPE'd staff in line with pay awards negotiated by the union in 2023/24 and assumptions for 2024/25. The actual and projected pay awards are set out in the table below.

	Council Baseline 2020/21 Outturn £m	Year 1 £m	Year 2 £m	Year 3 £m	Year 4 £m	Year 5 £m
Annual Cost	6.0	5.8	5.5	5.3	5.2	5.1
Annual actual/projected pay awards		0.1	0.3	0.3	0.2	0.1
Total Annual Budget		5.9	5.9	5.7	5.4	5.2

- 3.14 FM arrangements included Third Party Income (TPI) received by the council. In

operating a similar baseline as 2020/21, the TPI budget has been set at £0.6 million and will remain a fixed liability for BWC.

4. Goram Homes

- 4.1 The council approved the establishment of Goram Homes in 2018, with an initial Pipeline 1 development, namely: One Lockleaze (formally known as Romney House) and Baltic Wharf, land transfer (with a deferred capital receipt) and up to £10 million (earmarked revenue reserve) potential loan facility for working capital and development investment (terms still to be agreed for one of the schemes). Pipeline 1 schemes are expected to deliver 434 units of housing, 213 (49%) of which will be 'affordable' housing.
- 4.2 Against this approved £10 million, an initial loan facility of £3.3 million for Pipeline 1 working capital was established with a contractual repayment date (of principal plus interest) of March 2024. Draw downs from this £3.3 million facility are £2.4 million as at January 2024. There are no draw downs forecast in 2023/24 or 2024/25. The balance of £921,000 is currently forecast for 2025/26.
- 4.3 As part of Budget 2021/22, £4 million was released back to the council and the final £2.7 million of this approved £10 million was set aside as potential development funding also linked to Pipeline 1. As part of budget 2022/23, £1.7 million of this was released back to Reserves so that only £1 million then continues to be set aside for Pipeline 1.
- 4.4 The unrequired balance of £3.7 million remaining from the initial £10 million was re-directed in to a second £10 million loan facility for a suite of additional sites, referred to as Pipeline 2, as approved at Cabinet 26 January 2021. Pipeline 2 developments include: Hengrove, Dovercourt Road and New Fosseway Road.
- 4.5 From this 2nd Pipeline's overarching approved £10 million, a loan facility of £4 million for working capital was established during 2021/22 with a contractual repayment date (of principal plus interest) of March 2027. Drawdowns from this £4 million facility commenced in July 2022 with £1.5 million utilised as at January 2024, and a further £0.5 million forecast to be drawn down in 2023/24. The expected drawdown for 2024/25 is £1 million.
- 4.6 In addition to the above, in association with the Hengrove pipeline scheme, £10.1m of the West of England Combined Authority funding will transfer to Goram Homes via a 'pass down, back-to-back funding agreement' between the council and Goram Homes to support the development at Hengrove Park. It is expected that Goram Homes will manage the programme of works and submit quarterly returns to enable the council to comply with its obligations under the terms of the Funding Offer. It is also expected that Goram Homes will ensure that the £5m repayable loan element due to be repaid over the 3 financial years 2027/28 to 2029/30 will be repaid to the council in line with the agreed profile.
- 4.7 The council has confirmed in its budget the anticipated release of profits to the

shareholder, forecast as £6 million across 2025/26 and 2026/27, and will work with Goram to determine the appropriate and most cost effective mechanism to achieve this. In the interim, the council will make notional reductions to the Goram Homes pipeline reserves to reflect the intent and anticipated profile. This decision and forecast is on the basis of initial developments now coming to fruition and the company business projections.

- 4.8 The council's strategic priority for housing delivery may result in further development opportunities and whilst no further funding has been earmarked in 2024/25, should Goram be successful in securing these opportunities it would result in further pipeline funding adopting similar principles in the medium term to support the acceleration of housing development.

5. Other Shareholdings

City Leap

- 5.1 City Leap Partnership Limited is a 50:50 joint venture company between the council and Ameresco Limited, formed following a successful procurement by the council to appoint a strategic partner to assist with the council's aims to achieve its decarbonisation ambitions across its estate by 2030.
- 5.2 Funding of the Joint Venture Company (JV Co) is provided exclusively by Ameresco Limited, with no funding obligation on the council, noting that the primary role of the JV is project origination, with delivery responsibility sitting outside of JV Co with the wider City Leap Energy Partnership.
- 5.3 The effective date of the City Leap transaction was 4 January 2023. As at January 2024 £10 million of energy related grants have been secured by the council for projects being delivered by City Leap and £12 million of the council's capital decarbonisation fund has been aligned.
- 5.4 The overall level of planned investment by the wider City Leap Energy Partnership over the initial five-year period in low carbon energy infrastructure amounts to nearly £500 million.

6. Risk Management

- 6.1 On a monthly basis Bristol Holding Company reviews and consolidates the shareholder companies' common or specific high risks into its' group-wide risk register. In turn, quarterly or more regularly if appropriate, the council incorporates those risks into its Corporate Risk Register where it assesses them as significant to the council. It also includes an additional risk impacting the council as shareholder rather than the investment companies themselves.

Emerging risks

- 6.2 Regulatory changes introduced by the Environment Agency (EA) on Padded Residential Furniture (POPs- Persistent Organic Pollutants) is expected to

continue to increase the cost of disposing these items. The EA is considering increasing the materials in scope, beyond sofas and mattresses. Therefore, this poses an increased risk estimated between £0.5 - £1 million on cost of disposing bulky waste items. This estimated cost has not been built into the budget for 2024/25. This risk lies with the council and BWC as per the Paymech process of risks and rewards.

- 6.3 Emissions Trading Scheme (ETS) is a new tax that will be applied to per tonne carbon emitted from burning fossil fuel waste burnt at Energy Recovery Facilities (incinerators). The cost of permits per tonne could be between £30 - £50 and over time could increase to £100. This is due to be introduced in 2027/28 and could potentially cost the council between £2-4 million per annum, dependant on tonnage fossil fuels burnt and the trading price for ETS permits per tonne.
- 6.4 The housing market is subject to fluctuating economic and market conditions which continues to be a risk to Goram's commercial return. Those specifically impacting commercial return are time, cost and revenue. This includes time taken to grant planning permission, find appropriate partners and deliver homes, the cost of developing new homes being greater than planned and the loss of demand for property sales or reduction in sales values. These risks are managed most simply before the LLP is formed, and within the control of the LLP once projects commence.

7. Future opportunities

Temple Quarter

- 7.1 The Temple Quarter Regeneration Programme is one of the largest re-development opportunities in the UK. The establishment of a Temple Quarter Joint Delivery Vehicle will formalise the long-standing collaborative working arrangements that are already in place under the Memorandum of Understanding signed in February 2021 between the council and its Temple Quarter delivery partners Homes England, West of England Combined Authority and Network Rail (BTQ Partners). The BTQ Partners intend to establish the JDV in 2024 and commence the procurement process to select the development partner shortly thereafter.

Supported Housing

- 7.2 The council is currently exploring ways to deliver the outcomes set out in the emerging Supported Housing Delivery Plan to meet the need for Temporary Accommodation and Supported Housing across the city. This may result in setting up a new not-for-profit housing company / registered provider to deliver exempt accommodation to address this demand, and / or appropriate 'asset holding vehicle'. An Outline Business Case is currently being prepared to seek professional advice and consider potential options including the entity type and structure that will deliver the outcomes and achieve best value.

Appendix 10

Service and Corporate Pressures



Section 1: On-going Service and Corporate Pressures

Service Area	Investment	24/25 £m	25/26 £m	26/27 £m	27/28 £m	28/29 £m	Total £m
All Services	Pay Award & National Insurance Contributions	10.648	4.559	4.527	4.367	4.454	28.555
	General Contract Inflation and Levies	11.884	8.728	8.004	9.655	10.648	48.919
Total General and Inflationary Pressures		22.532	13.287	12.531	14.022	15.102	77.474
Adult Social Care	Demand and Demographic Growth	1.037	0.885	1.186	1.196	-	4.304
	Preparing for Adulthood - Cost of Care	0.355	0.366	-	-	-	0.721
	New Burden: New Better Care Fund	2.095	-	-	-	-	2.095
	Demand and Demographic Growth	-	-	-	-	1.000	1.000
	New Burden for Transfer of Care - First Cohort	0.655	0.655	-	-	-	1.310
	New Burden for Transforming Care linked to Hospital Discharge to the Community	-	1.966	-	-	-	1.966
	Core Grants in Service: Market Sustainability and Improvement Fund	2.391	-	-	-	-	2.391
	Core Grants in Service: Adult Social Care Discharge Fund	0.622	-	-	-	-	0.622
	Core Grants in Service: Independent Living Fund	1.618	-	-	-	-	1.618
	Core Grants in Service: Adult Social Care Market Sustainability and Improvement Fund - Workforce Fund	1.733	-	-	-	-	1.733
Community and Public Health	Environmental Health - Statutory Food Safety Inspections	0.085	-	-	-	-	0.085
Total Adult & Communities		10.591	3.872	1.186	1.196	1.000	17.845
Children and Families	Benefit from Invest to Save - Children's Placements Demand and Cost Pressures	(1.195)	(0.671)	-	-	-	(1.866)
	Bristol Children's Home Staffing and Maintenance Costs	0.250	-	-	-	-	0.250
	Placement costs - Additional Children From 2023/24	1.296	1.335	1.375	1.416	-	5.422
	Additional Social Workers to Support Increasing Children's Numbers	0.054	0.055	0.056	0.058	-	0.223
	Phoenix Court	(0.065)	-	-	-	-	(0.065)

	Probation Checks & Local Authority Designated Officer (LADO) Changes in Guidance	0.084	-	-	-	-	0.084
	Additional Pressures from Child Support Agency (CSA) Mandatory Reporting Requirements	0.055	-	-	-	-	0.055
	Working Together Implementation	0.066	-	-	-	-	0.066
	Children's Social Care Placement Demand Growth - additional children	0.328	0.338	0.348	0.359	0.359	1.732
	Children in Need - Support for Children at Home	2.000	-	-	-	-	2.000
	Prior Year Recurrent Service Pressures	12.123	-	-	-	-	12.123
	Total Children and Families	14.996	1.057	1.779	1.833	0.359	20.024
P e r f o r m a n c e	Educational Improvements						
	Home to School Transport Increased Demand	0.051	0.053	0.053	0.053	-	0.210
	Special Educational Needs Support	0.385	-	-	-	-	0.385
	Home to School Transport - Price and Volume	1.252	0.626	-	-	-	1.878
	Prior Year Recurrent Service Pressures	4.150	-	-	-	-	4.150
	Total Educational Improvements	5.838	0.679	0.053	0.053	-	6.623
	Total Children & Education	20.834	1.736	1.832	1.886	0.359	26.647
P e r f o r m a n c e	Property, Assets & Infrastructure						
	BWC - Transfer of additional Waste Efficiencies	0.029	0.029	0.030	0.030	-	0.118
	BWC - Facilities Management Net Annual Contractual Efficiencies	(0.005)	(0.019)	-	-	-	(0.024)
	Prior Year Recurrent Service Pressures (Energy)	1.550	-	-	-	-	1.550
	BWC Municipal Costs - Waste Growth and Demand Pressures	1.800	0.500	0.500	-	-	2.800
Housing and Landlord Services	Temporary Accommodation Demand	3.000	(3.000)	-	-	-	-
Management of Place	Increased Kennelling Costs	0.050	-	-	-	-	0.050
	Core Grants in Service: Food Security Enforcement	0.014	-	-	-	-	0.014
	Total Growth & Regeneration	6.438	(2.490)	0.530	0.030	-	4.508

Policy, Strategy and Digital	Additional phone lines required to ensure Payment Card Industry (PCI) Compliance	0.035	-	-	-	-	0.035
Legal & Democratic Services	Legal/Mortuary & Coroner Contract, Backlog and Staffing Cost	(0.058)	-	-	-	-	(0.058)
	Leader's Office staffing	0.100	-	-	-	-	0.100
	Committee Model staffing	0.300	-	-	-	-	0.300
	Coroners - Deceased Transport Contract	0.123	-	-	-	-	0.123
	Coroners - Histology & Toxicology Contract	0.082	-	-	-	-	0.082
	Prior Year Recurrent Service Pressures	0.507	-	-	-	-	0.507
Finance Services	Revenues Income / Debt Collection	0.300	(0.300)	-	-	-	-
	Core Grants in Service: Local Council Tax Support Admin Support Grant	0.724	-	-	-	-	0.724
	LCPF Household Support for Low Income Families	0.350	(0.062)	(0.288)	-	-	-
	Core Grants in Service: Family Annexe Council Tax Discount	0.009	-	-	-	-	0.009
Total Resources		2.472	(0.362)	(0.288)	-	-	1.822
Corporate	Insurance Premium & Self Insurance Fund	1.500	-	-	-	-	1.500
	PFI - Education & Leisure Unitary Charge	2.000	-	-	-	-	2.000
	Professional Fees – including Accounts	0.500	-	-	-	-	0.500
	SEND Project Delivery Capacity	0.663	0.555	(0.569)	(0.250)	-	0.399
	SEND Transformation - Corporate Contribution	3.500	-	-	-	-	3.500
	ASC Equal Pay Evaluation	1.227	(1.227)	-	-	-	-
	Transformation Delivery Capacity	6.140	(5.000)	-	-	-	1.140
Total Corporate		15.530	(5.672)	(0.569)	(0.250)	-	9.039
TOTAL		78.396	10.370	15.221	16.883	16.460	137.334

Table 1: Detail of on-going incremental revenue investment in services

1.1. The 2024/25 pay award has been budgeted at 5%. This pay award has been budgeted for centrally and notionally allocated across services at this stage. Its eventual distribution will follow once negotiations with Trade Unions have been concluded.

1.2. In addition, specific inflationary increases in Private Finance Initiative (PFI) unitary charges based on contractual terms and conditions and specific inflationary increases as set out in other (non-PFI) long-term contracts are budgeted for centrally and notionally allocated across the services at this stage. Again, distribution will follow materialisation of these pressures in-year.

Statutory Calculations in Respect of Council Tax

That it be noted that Council at their meeting on 9 January 2024 approved the Council Tax Base for 2024/25 as 134,752 for the whole Council area [Item T in the formula in Section 31B of the Local Government Finance Act 1992, as amended (the “Act”)].

This calculates that the Council Tax requirement for the council's own purposes for 2024/25 is £2,095.69

That the following amounts be calculated for the year 2024/25 in accordance with Sections 31 to 36 of the Local Government Act 1992 on the Mayor’s recommended increase of 4.99%:

a)	£1,260,468,744	being the aggregate of the amounts which the council estimates for the items set out in Section 31A(2) of the Act
b)	£978,070,325	being the aggregate of the amounts which the council estimates for the items set out in Section 31A(3) of the Act.
c)	£282,398,419	being the amount by which the aggregate at 3(a) above exceeds the aggregate at 3(b) above, calculated by the council, in accordance with Section 31A(4) of the Act, as its Council Tax Requirement for the year (item R in the formula in Section 31A(4) of the Act).
d)	£2,095.69	being the amount at 3(c) above (Item R), all divided by Item T (1(a) above), calculated by the council, in accordance with Section 31B(1) of the Act, as the basic amount of its Council Tax for the year.

To note that the Police and Crime Commissioner has issued precepts to the council in accordance with Section 40 of the Local Government Finance Act 1992 for each category of dwellings in the council's area as indicated in the table below.

To note that the Avon Fire Authority (AFA) have yet to issue their precept to the council. A draft precept based on a 2.99% (as notified by AFA) increase is included in the table below. This will be replaced with the approved precept and the table reissued in accordance with Section 40 of the Local Government Finance Act 1992 for each category of dwellings in the council's area.

The council, in accordance with Sections 30 and 36 of the Local Government Finance Act 1992, hereby sets the aggregate amounts shown in the tables below as the amounts of Council Tax for 2024/25 for each part of its area and for each of the categories of dwellings.

Valuation Bands (£)

Bristol City Council							
A	B	C	D	E	F	G	H
1,397.12	1,629.99	1,862.84	2,095.69	2,561.39	3,027.11	3,492.82	4,191.38
Police and Crime Commissioner for Avon and Somerset							
A	B	C	D	E	F	G	H
186.13	217.16	248.18	279.20	341.24	403.29	465.33	558.40
Avon Fire Authority							
A	B	C	D	E	F	G	H
56.95	66.45	75.94	85.43	104.41	123.40	142.38	170.86
Aggregate of Council Tax Requirements							
A	B	C	D	E	F	G	H
1,640.20	1,913.60	2,186.96	2,460.32	3,007.04	3,553.80	4,100.53	4,920.64

The council's basic amount of Council Tax for 2024/25 is not determined to be excessive in accordance with principles approved under section 52ZB of the Local Government Finance Act 1992.

Changes to Council Tax

1. Full Council is asked to determine:

- 1.1 From 1 April 2024, for properties defined in the Local Government Finance Act 1992 and its subordinate legislation as being **long term empty dwellings that are substantially unfurnished**:
- A discount shall not apply
 - An additional council tax charge will be applied at the maximum permitted level:

Dwelling empty for less than 5 years, but at least 1 year	Dwelling empty for less than 10 years, but at least 5 years	Dwelling empty for 10 years or more
100%	200%	300%

- 1.2 From 1 April 2025, for properties defined in the Local Government Finance Act 1992 and its subordinate legislation as being dwellings that are occupied periodically, where there is no resident, and that are substantially furnished:
- A discount shall not apply
 - An additional council tax charge will be applied at the maximum permitted level of 100%

2. Evidence Base

- 2.1 In its original form, The Local Government Finance Act 1992 prescribed certain discounts to be applied where there is no resident of the dwelling. Subsequent amendments have allowed a billing authority to set policies for the application of certain council tax discounts and increased charges (premiums) on dwellings that are not occupied.
- 2.2 **Long term empty dwellings** are currently defined as those that have been unoccupied and substantially unfurnished for at least 2 years. Bristol City Council has previously opted not to apply a discount, and to apply the maximum percentage increases on these dwellings as set out below:

	Dwelling empty for less than 5 years, but at least 2 years	Dwelling empty for less than 10 years, but at least 5 years	Dwelling empty for 10 years or more
1 April 2019	100%	100%	100%
1 April 2020	100%	200%	200%
1 April 2021	100%	200%	300%

- 2.3 **The Levelling Up and Regeneration Act 2023** has further amended the current provision.

Long term empty dwellings have been redefined as those that have been unoccupied and substantially unfurnished for at least **1 year** (previously 2 years). This amendment has effect for financial years from 1 April 2024, and it does not matter whether the 1-year period begins before this date. For example, if a dwelling has been unoccupied and substantially unfurnished for more than 1 year (but less than 2 years) on 1 April 2024, the increased charge will be applied from 1 April 2024. If a dwelling has been unoccupied and substantially unfurnished since 1 May 2023, the increased charge will be applied from 1 May 2024.

Our records indicate a number of properties have been empty for between one and two years and this position will be verified.

- 2.4 Councils have now been given the option to apply an additional council tax charge of a maximum 100% for **dwellings that are occupied periodically**. The conditions are that there is no resident, and the dwelling is substantially furnished. These are sometimes referred to as ‘second homes’ and this premium will apply in more situations than might normally be regarded as a ‘second home’ including:
- where the resident has fled through violence or fear of violence
 - domestic premises used as staff or office facilities by a business (eg flat above a shop)
 - flats used by overnight carers, patients, families, visitors or staff of hospitals, sheltered housing, vet surgeries etc
 - apartments for let that are not rated for business rates

Around 2000 dwellings are recorded as empty and substantially furnished and this status will be verified.

- 2.5 A council must make a determination to apply this additional charge at least one year before the beginning of the financial year to which it relates, and it is proposed that Bristol City Council applies the maximum increased charge of 100% with effect from 1 April 2025.
- 2.6 The Secretary of State may by regulations:
- identify certain dwellings for which these premiums may not be applied
 - specify a different percentage limit for those quoted above
- 2.7 The Government has recently [consulted](#) on proposals to exempt certain categories of dwellings from these premiums, and has proposed that the premiums should not be applied in the following circumstances:

Empty Homes

- Undergoing major repairs (for up to 6 months)

‘Second homes’

- Annexes forming part of a main dwelling
- Job related dwellings
- Occupied caravan pitches and boat moorings
- Seasonal homes where occupancy is restricted

Both Empty and ‘Second homes’

- Properties undergoing probate
- Being actively marketed for sale or let

2.8 The outcome of the consultation has not been published, and we have no indication as to whether any of the above proposals, or if any other circumstances, might be brought forward as exemptions. Regulations for any exemptions could be laid prior to the implementation dates above.

2.9 A decision by Bristol City Council to increase the council tax charge for dwellings that are occupied periodically and are substantially furnished will apply in all cases that meet the criteria unless an exemption is specified in Regulations.

3. Potential income

3.1 If we estimate that 20% of existing dwellings could be exempt from the premium, an indicative income from furnished properties which are unoccupied could be:

Number of properties	Band D equivalents	Reduce by 20%	Estimated Band D charge 25-26*	98%
2000	1667	1334	2200.26	2.876m

*Assumes a 4.99% increase

Service Investments / Loans & Guarantees

The council invests its surplus cash balances with approved financial institutions, predominately banks, building societies and other local authorities, in accordance with the council's Treasury Management Strategy as set out in Appendix 4. These funds support meeting our current and future obligations with regards to providing revenue services and delivering the capital programme.

The authority has other commercial investments which are expected to generate both a commercial and social return. For social investments, their primary purpose is to provide service benefits / social impact while the generation of yield and liquidity is secondary. These are commonly known as service investments / impact investments and are summarised below, except for investments and loans to the council's wholly owned subsidiaries that are detailed in Appendix 9.

Investment	Approved Budget (£m)	Type	Amount Investe (£m)	Amount Repaid (£m)	Amount O/S (£m)
Homelessness Property Fund	10	Share & Loan Capital	10	1.3	8.7
Temporary Accommodation Property Fund	4	Share & Loan Capital	3.5	-	3.5
City Funds LP	5	Loan Capital	4.1	-	4.1
Great Western Credit Union	0.5	Loan Capital	0.5	-	0.5
Bristol & Bath Regional Capital	0.3	Loan Capital	0.3	-	0.3
Avon Mutual Community Bank	0.3	Share Capital	0.3	-	0.3
Bristol Port Company	2.5	Share Capital	2.5	-	2.5

Note: To ensure the council's investment is protected, commercial information that could impact on an individual organisation will be managed sensitively.

1. Property Funds

The investment into these specific property funds is anticipated to generate a yield of circa 3% whilst also providing support and accommodation to address homelessness in Bristol.

Homelessness Property Fund

This fund acquired 99 properties in Bristol and surrounding areas that are managed by a local charity as private rented properties on assured shorthold tenancies with rents at Local Housing Allowance. The council has 100% nomination rights and places homeless households in these properties as a move on from Temporary Accommodation or as an alternative to Temporary Accommodation. The expected length of tenancy is 2 – 3 years and our charity partner supports tenants to move into other alternative private rented

accommodation enabling the council to house more homeless households in these properties.

Temporary Accommodation Property Fund

The council are investing £4 million into this £6 million fund, of which £1 million will be funded by the council and the remaining £3 million funded by a central government grant. The fund will purchase 34 x 1 bedroom properties in Bristol to be used as supported move on accommodation for vulnerable single homeless households. The accommodation is Temporary Accommodation with support and clients can stay in the accommodation for up to 2 years.

City Funds LP

The council has approved investment of £5 million matched by Big Society Capital to create an invest fund of £10 million with a target yield of 4%. The aim of the fund is to provide loans to local communities that would seek to deliver outcomes within four priorities: No Child Goes Hungry, Economic Inclusion, Community Initiatives and Environmental Stability. The approved business plan and subsequent agreement anticipated that repayment of the investment would commence within 2023/24 (year 5). Following the initial delay to the start of the investment programme the repayment has been reprofiled and is now scheduled in the council's accounts to commence in the financial year 2024/25.

Great Western Credit Union

A loan of £0.5 million generating a return of 6% was approved by the council to allow the Credit Union to lever an additional £0.350 million from charitable and social investors to enable a new online platform, grow membership and provide more loans to people in the most deprived wards of Bristol who might otherwise borrow from high-cost lenders.

Bristol & Bath Regional Capital

To provide a loan to create a sustainable investment model for the region of Bristol.

Avon Mutual Community Bank

Purchase of foundation shares to explore the creation of a regional community bank with an inclusive finance ethos that supports the local community and economy.

Bristol Port Company

In 1991 the council sold a 150-year lease of the Avonmouth and Royal Portbury Docks to the Bristol Port Company, consideration including shares with a book value of £2.5 million. These shares generate, on average £2 million a year in dividends that supports the revenue budget. The estimated market valuation of this asset in the financial statements for the year ending 31 March 2023 was £24 million.

2. Guarantees

Bristol Energy (BE) Indemnity

Following the sale of Bristol Energy in 2020 a process began of entering the successor company, BE 2020 Limited into a members voluntary liquidation. The council granted an overarching indemnity of up to £7.3 million to cover all liabilities which may fall due as a consequence of the sale and orderly winding up of BE 2020. The indemnity remains in place until all transactions associated with the wind up are completed.

City Leap

Under the terms of the City Leap Share Purchase Agreement and Concession Agreement, standard business warranties have been given by the council, relating to key aspects of the former BHNL's business such as, accounts, tax warranties, breach of grant funding conditions, assets, contract and land ownership where parts of the heat network cross. The Council is also providing standard TUPE indemnities for transferring employees and standard contractual warranties for a range of other matters as set out in the Cabinet report dated 16 December 2022 within Exempt Appendix I (ii) due to their commercial sensitivity. An appropriate level of risks provision against the contingent liabilities outlined above is assessed annually and is captured within the council's capital investment reserve, and tapered as the associated liabilities fall away.

Bristol Schools Forum Feedback

In approving the 2024/25 Dedicated Schools Grant (DSG) and Council Budget, members are asked to note the feedback from Bristol Schools Forum meeting of 16 January 2024 below.

Context

Schools Forum is responsible for making the following key decisions in relation to the Dedicated Schools Grant:

- Movements of up to 0.5% from the schools block to other blocks
- De-delegation of funds from mainstream maintained schools
- Use of the Growth Fund for pupil growth and falling rolls
- Certain categories of central expenditure including Early Years Block provision and contributions to combined budgets

Schools Forum must also be consulted on the following in relation to key funding decisions made by the Local Authority:

- Funding formula changes including redistributions
- Arrangements for Pupil Referral Units and pupils with SEND
- Arrangements for Early Years provision
- Exclusions from the Minimum Funding Guarantee

The Local Authority is responsible for making key funding decisions in relation to:

- Funding formula changes including redistributions
- Setting the budget for the High Needs Block

Feedback

Bristol Schools Forum provides the following feedback to Cabinet and Council, for their consideration in making final decisions on the DSG Budget for 2024/25:

- Whilst an increase in the funding allocation from government is welcomed in the new financial year, Council is asked to note the substantial cost pressures in the sector for both schools and Early Years. These challenges have been evident for several years and exacerbated primarily due to the pandemic and a range of cost-of-living increases that have impacted on schools and settings. Any support that the council can provide in their wider engagement with government and supporting the voice of schools and early years in securing additional funding to support these ongoing cost pressures would be welcomed.
- Schools Forum noted that the funds allocated by the DfE for 3- & 4-year-olds were not viewed favourably by those responding to the Early Years consultation, where more voted against it than for it. Whilst it was recognised that the values are prescribed and not determined by the council, Schools Forum members expressed general concern at the Early Years funding situation.
- Schools Forum supports the 0.5% transfer from Schools Block to the High Needs Block to support the High Needs budget and the plans, as proposed, in relation to the utilisation of the Central School Services Block.

Supplementary Estimates

for the year ending 31 March 2024

Date of Request: **03/01/2024**

Date of Mayor / Cabinet endorsement: **23/01/2024**

Director: Reena Bhogal – Welsh, Education and Skills

Director: Fiona Tudge, Children and Families

Cabinet Member: Asher Craig, Councillor St George West

DECISION REQUIRED:

The approval of a supplementary estimate of up to £18.503 million for the Children & Education Directorate to maintain existing services and financial commitments.

1. Directorate Original Budget Build Up

- 1.1. The Children & Education Directorate has a current revised budget of £112.230m as detailed below and is seeking supplementary estimates up to £18.503m.
- 1.2. Children and Family Services has a current revised budget at Period 8 of £90.053m against which it is forecasting pressures of £13.957m This includes growth this year of £14.0m made up of £10.5m of recurring pressures identified and included in the 2023/24 budget (supplementary estimates) and £3.5m of emerging risks identified and included in the 2023-28 Budget. Further pressures have been identified in-year and the service is seeking a supplementary estimate up to £14.0m
- 1.3. Education Improvement has a current revised budget at Period 8 of £22.655m against which it is forecasting pressures of £4.546m. This includes growth of £4.5m made up of £4.0m of recurring pressures identified and included in the 2023/24 budget (supplementary estimates) and £0.5m of emerging risks identified and included in the 2023-28 MTFP. Further pressures have been identified in-year and the service is seeking a supplementary estimate up to £4.5m.
- 1.4. Full Council has previously (31 October 2023) approved a supplementary estimate of £11.521m. For the avoidance of doubt this estimate incorporates the previous estimate as an overall variance and is not in addition to it.
- 1.5. The 2023/24 Budget as approved by Full Council (21 February 2023) included corporately held budget for contract inflation within the Children and Education Directorate of £1.652m.
- 1.6. The directorate now requests further supplementary estimate of £5.330m (see Table 1). This can be funded (per Table 2) by:
 - £1.034m previously moved to and held in abeyance within corporate earmarked reserve at Q2/P5 2023/24.
 - A further £4.296m one-off to be transferred from corporately held budget for contract inflation to corporate earmarked reserve following Q3/P8 2023/24 and held in abeyance.

Table 1

				Total variance Q3/P8 to be funded through: additional budget revisions		
	Revised Budget	Q3/P8 Forecast	Total Variance Q3/P8	Previously approved supplementary estimate (FC 31/10/23)	Corporately held budget for inflation (FC 21/2/23)	New request for supplementary estimate
	£'000	£'000	£'000	£'000	£'000	£'000
9 - Children & Education						
15 - Children and Families Services	90,053	104,010	13,957	7,531	1,256	5,170
16 - Educational Improvement	22,655	27,201	4,546	3,990	396	160
1B - Transformation – Our Families Programme	0	1	0	0	0	0
Total 9 - Children & Education	112,709	131,212	18,503	11,521	1,652	5,330

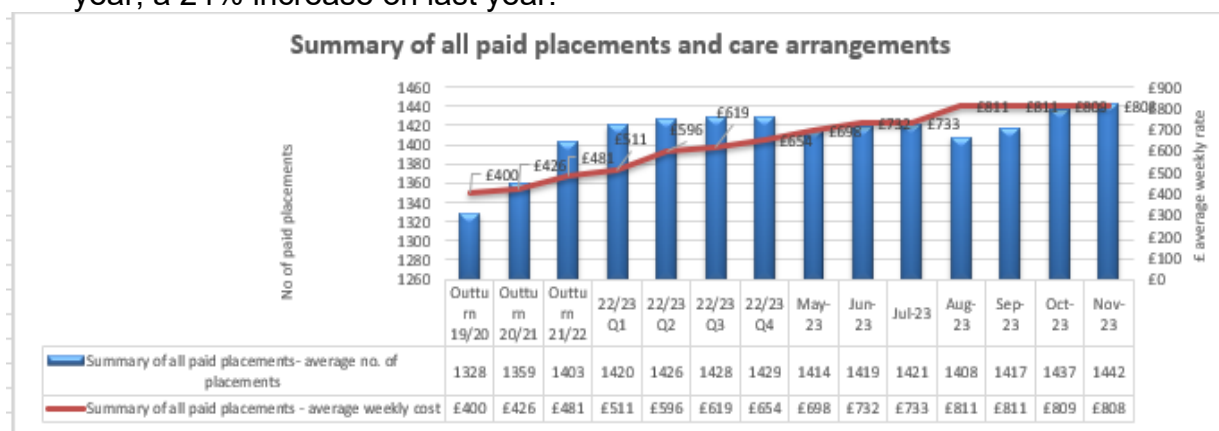
Table 2

New request for supplementary estimate	To be funded from balance remaining in earmarked reserve	To be funded from corporately held budget for contract inflation
£'000	£'000	£'000
5,170	874	4,296
160	160	0
0		
5,330	1,034	4,296

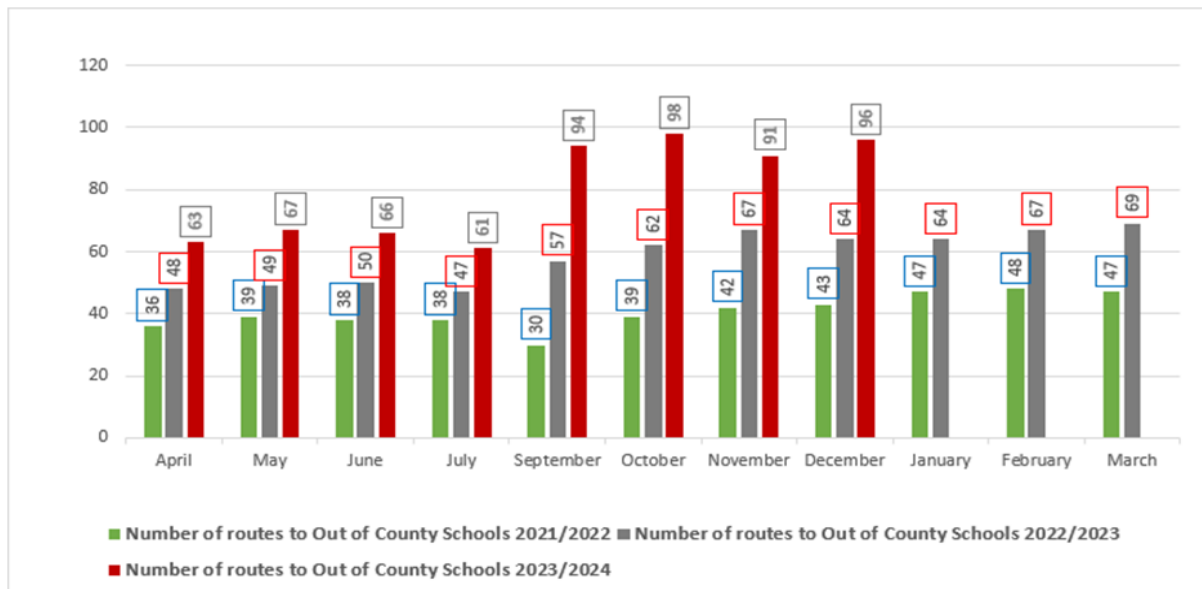
2. Justification

2.1. The Children & Education budgets have experienced significant cost pressures in Children and Family Services and Educational Improvement as follows:

2.2. There has been a significant increase in the number of supported placements this year as represented in the chart below. This cost of provision is estimated to be £56m this year, a 24% increase on last year.



2.3. The Home to School Travel service saw a 44% increase in the number of routes to schools outside the local area to December 2023, compared to the same period last year, which itself was a 45% increase on 2021/22.



3. In-Year Controls

- 3.1. Savings and recovery actions are being implemented across the Children & Education Directorate in terms of scrutinising all areas of spend and increased levels of management oversight and sign off. For example, in Children detailed work is ongoing to ensure that, where it is safe and appropriate to do so, placements are stepped down to the most cost effective level.

4. Impact Description

Costs	Funding Source
£18.503m Revenue	Earmarked Reserves: Recovery mitigations held in abeyance
Impact if not Approved	
If the supplementary estimate is not approved, then the service will overspend and will not be able to maintain statutory service provision.	

5. Learning Points

- 5.1. Lack of local sufficiency in provision is pushing an increasing number of children with EHCPs and other social care placements to provision further away from the city resulting in increasing need for transport out of the city and reliance on independent provision at a higher cost.
- 5.2. Further planning around local provision and better linking with the ECHP process, together with the ongoing work on the transformation programme, including changes to the travel policy and offering should help manage these pressures in the future.
- 5.3. When setting the budget before the start of each year, the council considers the robustness of the estimates and assumptions, as well as plans and strategies that could be used to deliver a balanced budget should unexpected pressures or events materialise. This has been a particularly challenging financial year in terms of inflationary and other cost pressures, some of which could not have been predicted. Improved service planning to forecast future levels of capacity and demand and how that can be commissioned within a finite budget envelope will continue to be an area of focus.

6. Previously Approved Supplementary Estimates

- 6.1. Full Council has previously approved a supplementary estimate of £11.521m (at 31 October 2023), now incorporated within this supplementary estimate.

7. Supplementary Estimate - Sign Off

The following people have signed off this Supplementary Estimate	Evidence of Sign-off (email/121)	Date
Director – Reena Bhogal-Welsh	Email	10 th January 2024
Director – Fiona Tudge	Email	10 th January 2024
Cabinet Member – Asher Craig	Email	15 th January 2024
Section 151 Officer – Denise Murray	Email	15 th January 2024

Equality Impact Assessment [version 2.10]



Title: Dedicated Schools Grant Budget 24/25	
<input checked="" type="checkbox"/> Budget Proposal	<input type="checkbox"/> New <input checked="" type="checkbox"/> Already exists / review <input type="checkbox"/> Changing
Directorate: Children and Education	Lead Officer name: Reena Bhogal-Welsh
Service Area: Education	Lead Officer role: Director of Education, Skills & Learning

Step 1: What do we want to do?

The purpose of an Equality Impact Assessment is to assist decision makers in understanding the impact of proposals as part of their duties under the Equality Act 2010. Detailed guidance to support completion can be found here [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#).

This assessment should be started at the beginning of the process by someone with a good knowledge of the proposal and service area, and sufficient influence over the proposal. It is good practice to take a team approach to completing the equality impact assessment. Please contact the [Equality and Inclusion Team](#) early for advice and feedback.

1.1 What are the aims and objectives/purpose of this proposal?

Briefly explain the purpose of the proposal and why it is needed. Describe who it is aimed at and the intended aims / outcomes. Where known also summarise the key actions you plan to undertake. Please use [plain English](#), avoiding jargon and acronyms. Equality Impact Assessments are viewed by a wide range of people including decision-makers and the wider public.

Budget context

Every year, Bristol City Council must agree an annual budget which balances the money we spend with the money we are expecting to receive. Councils across the country are continuing to face financial challenges, reflecting the economic context, including the significant inflationary environment, combined with continuing demand pressures and limitations on government funding. Based on our current forecasts, we face a funding gap over the next five years (to 2028/29) of £32.2 million. This is in addition to the £17.7 million of savings and efficiencies proposals for 2024-2028 outlined in the 2023/24 budget and assumed delivery of 2023/24 savings in the current year.

The Council has defined statutory responsibilities, but deliver against a far broader agenda, providing universal services benefiting the whole community, and targeted services aimed at individuals, communities with particular needs, and businesses – administered by our workforce, city partners, stakeholder organisations and commissioned services.

To address these challenges we are looking across all of our services with a focus on:

- maximising our transformation programmes – where we are looking to improve services whilst achieving the best value for money
- income opportunities – where we are looking to improve our external income and most effectively apply that income

- targeted reviews – where we are looking at services that are comparatively high in cost compared to other councils to see where we can do things differently to reduce costs, be more efficient in how we do things and, in some cases, stop doing some things entirely.

Purpose

To note that in year 2023/2024 position for the overall Dedicated Schools Grant (DSG) is a fair and consistent distribution of funding that is closely aligned to need and is essential to supporting opportunity for all children, irrespective of their background, ability and need. The DSG is distributed centrally distributed from central government. This proposal covers an additional uplift to the Early Years bloc. The Delivering Better Value in SEND (DBV) workstream focused on 'Top-Up' funding, which forms part of the DSG deficit management plan, is subject to its own EqIA. This will be published and presented to Cabinet for a key decision on the 6 February 2024.

The DSG is the main source of revenue funding for state-funded 5 to 16 schools in England. DSG is paid to local authorities, minus deductions ('recoupment') for academies and subject to certain other adjustments. The Grant comprises of four blocks:

- The Schools Block
- Schools Central Services Block
- The High Needs Block
- The Early Years Block

The DSG is a ring-fenced grant of which the majority is used to fund individual school budgets in maintained schools, academies and free schools. It also funds early years nursery free entitlement places for two, three and four year-olds as well as provision for pupils with high needs including those with Special Educational Needs and or Disabilities (SEND) Education Health and Care Plans (EHCPs) in special schools and specialist provision in and out of Bristol.

Our Goals:

- Enable all children and young people to achieve their potential through having access to the right resources and provision needed to meet their needs and the right support for their education settings.
- Improve outcomes for Bristol's Disabled children and young people with SEND as well as those identified with high needs including educational aspirations, engagement and progress in learning, in line with those who do not have SEND or high needs.
- Make sure all children and young people attend the right education setting that can meet their needs, where they receive a full time/ appropriate education offer that ensures they are safeguarded and their welfare is promoted.
- Reduce persistent absence and increase attendance for Disabled children and young people in receipt of SEND support and those with EHCPs.
- Reduce / eliminate the need for permanent exclusions and reduce multiple suspensions for children and young people in receipt of SEND Support and those with EHCPs.
- Ensure each young person progresses post-16 to suitable education, training or employment and is fully prepared for adulthood.

Early Years Block

Early Years Block is based on census data collected throughout the year. The indicative allocation is based on January census only, so the actual amount will be updated by the Education Skills Funding Agency (ESFA) once the Spring 2024 census figures are known.

The 2024/25 allocation includes £14.996m of new funding being:

- New 2 year-old and under entitlement to 15 hours of free childcare for eligible parents
- Extension of pupil premium and Disability Access Fund (DAF) to eligible 2 year olds and under

Overall, the change in early years funding is £17.748m increase when compared to 2023/24.

The release of the block allocations also included the first indication of the hourly rates for 2024/25.

- For 3 & 4 year-old the rate will increase by 17p to £5.97 from £5.80 in 2023/24.
- The 2 year-old rate will increase by £2.36 to £5.89 in 23/24

- The under 2 year-old rate will be £11.24 which is new for 2024/25.

These are the rates used to calculate funding to the LA, the rates paid to providers are outlined in section 5 of this report. Overall the indicative Early Years block has increased by £17.7m, to £55.180m in 24/25 from £37.432m in 23/24.

The Maintained Nursery School (MNS) supplementary funding will increase to £4.64 per hour; this is equivalent to an indicative increase of £0.613m in funding based on part-time participation number of 1,177 for 15 hours per week, 38 weeks per year.

As a result of any cabinet decisions, there may be a policy change for the Non statutory top up funding process. The policy may identify a new way of working for the non statutory top up funding process that all partners of SEND will need to be aware of. Workstream 2 of Delivering Better Value required the procurement of an independent delivery partner, as part of the tendering process, their equality and diversity moral purpose was measured to ensure that the chosen partner was aligned to the inclusion agenda. The EQIA will be updated and reviewed and any further specific proposals will be subject to their own specific EQIAs

NB: There have been significant changes in the guidance regarding how local authorities must distribute funding, which culminated in the publication of changes here which outline the expansion of free childcare to Under 2s and 2 year-olds from working families, beginning in April 2024 (and fully rolling out by Sept 2025). [Date set for new childcare offer applications - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/news/date-set-for-new-childcare-offer-applications). There remains a requirement to consult with providers prior to setting rates, which ran for 6 weeks and concluded on 29th Dec 2023.

1.2 Who will the proposal have the potential to affect?

<input type="checkbox"/> Bristol City Council workforce	<input checked="" type="checkbox"/> Service users	<input checked="" type="checkbox"/> The wider community
<input checked="" type="checkbox"/> Commissioned services	<input checked="" type="checkbox"/> City partners / Stakeholder organisations	
Additional comments:		

1.3 Will the proposal have an equality impact?

<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	[please select]
--	------------------------------------	-----------------

Could the proposal affect access levels of representation or participation in a service, or does it have the potential to change e.g. quality of life: health, education, or standard of living etc.?

If 'No' explain why you are sure there will be no equality impact, then skip steps 2-4 and request review by Equality and Inclusion Team

If 'Yes' complete the rest of this assessment, or if you plan to complete the assessment at a later stage please state this clearly here and request review by the Equality and Inclusion Team.

2.1 What data or evidence is there which tells us who is, or could be affected?

Please use this section to demonstrate an understanding of who could be affected by the proposal. Include general population data where appropriate, and information about people who will be affected with particular reference to protected and other relevant characteristics: [How we measure equality and diversity \(bristol.gov.uk\)](https://www.bristol.gov.uk/how-we-measure-equality-and-diversity)

Use one row for each evidence source and say which characteristic(s) it relates to. You can include a mix of qualitative and quantitative data e.g. from national or local research, available data or previous consultations and engagement activities.

Outline whether there is any over or under representation of equality groups within relevant services - don't forget to benchmark to the local population where appropriate. Links to available data and reports are here [Data, statistics and intelligence \(sharepoint.com\)](#). See also: [Bristol Open Data \(Quality of Life, Census etc.\)](#); [Joint Strategic Needs Assessment \(JSNA\)](#); [Ward Statistical Profiles](#).

For workforce / management of change proposals you will need to look at the diversity of the affected teams using available evidence such as [HR Analytics: Power BI Reports \(sharepoint.com\)](#) which shows the diversity profile of council teams and service areas. Identify any over or under-representation compared with Bristol economically active citizens for different characteristics. Additional sources of useful workforce evidence include the [Employee Staff Survey Report](#) and [Stress Risk Assessment Form](#)

Data / Evidence Source [Include a reference where known]	Summary of what this tells us
Census 2021	The Census details the demographic profile of Bristol.
<p>School census: Data is from the Jan 2023 school census and provides information on the number of pupils in Bristol schools with SEND.</p>	<p>The School Block</p> <p>The 24/25 School Block allocation is based upon:</p> <ul style="list-style-type: none"> • Primary (Reception-Year 6) 34,670 pupils • Secondary age pupils (Y7-Y11): 21,788 pupils <p>The 23/24 School Block allocation is based upon:</p> <ul style="list-style-type: none"> • Primary (Reception-Year 6) 35,005 pupils • Secondary age pupils (Y7-Y11): 21,607 pupils <p>Overall the balance has shifted with 335 fewer primary age pupils, and 181 more secondary age pupils.</p> <p>Note: This does not include pupils who live in Bristol but attend a school out of area or young people not of school age.</p> <p>Pupils with SEND in schools</p> <p>We know from Bristol’s school census data that for school age children – boys are more likely to receive support for non-physical SEND needs than girls, whilst Black African children are more likely to be in receipt of non-statutory top-up funding at mainstream schools; and more likely to be at a special school. Mixed White and Black African/Caribbean children are also overrepresented, whilst White British children are underrepresented compared to the Bristol population average. We also know that Disabled children with SEND are more likely to live in a deprived area and be eligible for free school meals. Over 13,500 pupils in Bristol been diagnosed with special educational needs (SEN). This is an increase of 9% in the last year and 43% since 2016.</p> <ul style="list-style-type: none"> • 2,877 pupils have an Education, Health and Care plan (EHC plan)

- 10,944 pupils have SEND but no EHC plan – SEND support (SEND support means support that is additional to, or different from, the support generally made for other children of the same age in a school.)

In Bristol, 4.1% of pupils have an EHC plan. The percentage of pupils with an EHC plan has been increasing since 2018 but is still below the national average (4.3%).

The proportion of pupils in Bristol schools with SEND support continues to increase with 15.6% of pupils recorded with SEND support in 2023, higher than the national average of 13%.

SEND provision by school type

Rates of EHC plans and SEND support are higher in secondary schools than primary schools.

- In primary schools, 2.1% of pupils have an EHC plan and 14.9% have SEND support
- In secondary schools, 2.7% of pupils have an EHC plan and 16.7% have SEND support

Pupil characteristics (does not include independent schools)

SEND Diagnosis is more prevalent in boys than girls, both locally and nationally.

- 71% of pupils with an EHC plan are boys
- 62% of pupils with SEND Support are boys

In Bristol, EHC plans are most prevalent at age 12 and SEND support rates are highest for 9 and 10 year olds. The proportion of pupils with SEND support increase with age up until age 10. The proportion of pupils with an EHCP also increases with age from 3.5% at age 4 to 11.5% at age 12.

White British children make up a smaller proportion of the population in receipt of top-up funding than they do of the general British population of the same age (2021 Census data) by around 16%. Black African children are 27% more likely to be in receipt of non-statutory top-up at mainstream schools, and 60% more likely to be at a special school than the average child in Bristol. Mixed White and Black African/Caribbean children are also overrepresented. A full analysis of impact by ethnicity has not been possible due to data limitations.

Ethnic group	EHCP		SEN Support	
	Bristol	England	Bristol	England
White British	4.5%	4.5%	16.7%	14.3%
Irish	4.2%	4.4%	12.1%	13.6%
Traveller Of Irish Heritage	2.0%	6.1%	25.5%	25.5%
Any Other White Background	2.7%	2.9%	10.8%	9.5%
Gypsy Roma	3.3%	4.8%	27.5%	22.2%
White And Black Caribbean	6.8%	5.4%	20.8%	17.0%
White And Black African	4.6%	4.5%	15.9%	12.6%
White And Asian	2.6%	3.4%	11.0%	10.1%
Any Other Mixed Background	4.6%	4.3%	15.5%	11.5%
Indian	2.0%	2.4%	7.3%	6.3%
Pakistani	3.8%	3.9%	14.1%	11.2%
Bangladeshi	5.2%	4.5%	12.4%	10.2%
Any Other Asian Background	3.5%	3.7%	8.4%	8.0%
Black Caribbean	7.0%	5.8%	26.0%	16.5%
Black African	4.7%	4.5%	14.1%	10.4%
Any Other Black Background	5.7%	5.6%	15.0%	12.7%
Chinese	2.6%	2.1%	5.3%	4.9%
Any Other Ethnic Group	4.1%	3.4%	11.4%	10.1%
Unclassified	4.8%	4.7%	13.8%	11.6%

cc	Mainstream (EHCP)	Mainstream (Non-Stat)	Special Schools
White British	0.85x	0.75x	0.82x
Black African	1.06x	1.24x	1.65x
Any Other White Background	0.83x	0.99x	0.89x
White and Black Caribbean	1.36x	1.43x	1.63x
Any Other Mixed Background	1.69x	1.60x	1.32x
Pakistani	0.67x	0.76x	0.97x
Black Caribbean	1.87x	2.81x	1.82x
Any Other Black Background	1.39x	1.03x	1.62x
White and Black African	1.22x	1.28x	1.19x
Any Other Asian Background	0.91x	1.51x	2.00x
Any Other Ethnic Group	0.92x	0.81x	0.64x
White and Asian	0.46x	0.34x	0.50x
Bangladeshi	1.21x	0.64x	1.69x
Indian	0.58x	0.41x	0.40x
Chinese	0.55x	0.44x	0.97x
White Irish	0.77x	0.40x	1.08x
Traveller of Irish Heritage	1.02x	2.15x	nanx

Primary type of need (does not include independent schools)

Speech, language and communication needs is the most common primary need type for SEND pupils in Bristol. For pupils with SEND support the most common primary need type is also speech, language and communication needs, but for pupils with an EHC plan it is Autistic Spectrum Disorder.

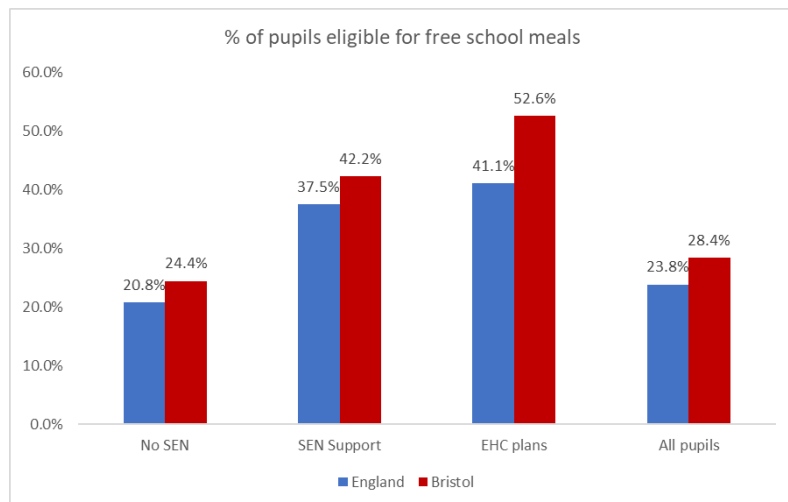
Primary Need	EHCP	SEN Support	Total
Speech, Language and Communications needs	413	2943	3356
Social, Emotional and Mental Health	640	2467	3107
Autistic Spectrum Disorder	922	653	1575
Specific Learning Difficulty	113	1439	1552
Moderate Learning Difficulty	178	1020	1198
Other Difficulty/Disability	61	472	533
SEN support but no specialist assessment of need	0	364	364
Physical Disability	107	207	314
Hearing Impairment	82	131	213
Severe Learning Difficulty	129	34	163
Visual Impairment	33	67	100
Profound & Multiple Learning Difficulty	90	4	94
Multi- Sensory Impairment	5	23	28

The most common primary need in primary schools is speech, language and communication needs (2,236 pupils), with a much higher number of pupils with this need type compared to secondary schools (822 pupils).

In secondary schools the most common primary need type is social, emotional and mental health (1,320 pupils).

Free school meal (FSM) eligibility (does not include independent schools)

Pupils with SEND are more likely to be eligible for free school meals.



SEN2: data is from the SEND statutory return, SEN2, and includes information on Disabled children and young people with SEND from 0-25 years who live in a Bristol postcode.

<https://www.explore-education-statistics.service.gov.uk/find-statistics/education-health-and-care-plans>

Summary of what the below data tells us: The children and young people for whom Bristol maintains an EHC Plan are distributed across the age ranges, with the vast majority (91%) aged between 5 and 19 years.

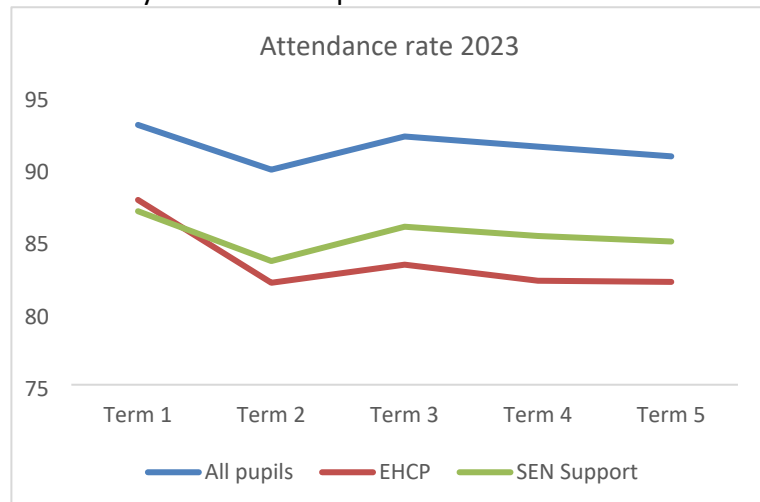
Of those 3,709 children and young people for whom Bristol maintains an EHC Plan in January 2023:

- 141 (3.8%) are aged under 5 years
- 1139 (30.7%) are aged 5 to 10 years
- 1413 (38.1%) are aged 11 to 15 years
- 839 (22.6%) are aged 16 to 19 years
- 177 (4.8%) are aged 20 to 25 years

Attendance & Deprivation
(Source: Xvault)

Summary of what the below data tells us:

The attendance rate for pupils with an EHCP or SEND support is consistently below the overall attendance rate for Bristol schools. We also know that Disabled children with SEND are more likely to live in a deprived area.



Deprivation

41.6% of pupils with SEND support live in a deprived area and 58.5% of pupils with an EHCP. This compares to 34.9% of all pupils in Bristol.

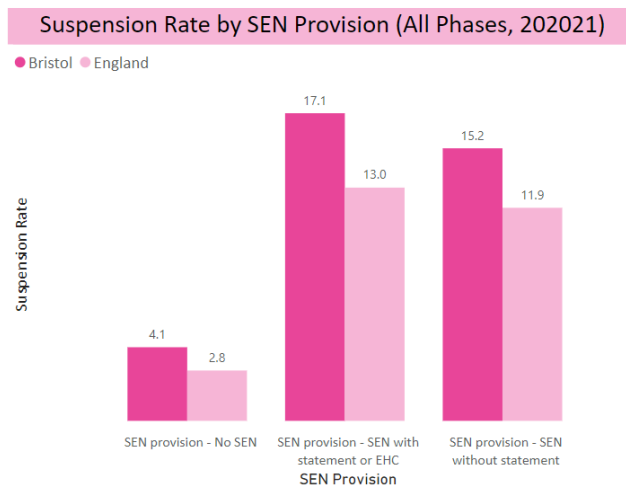
NB: in this analysis a deprived area is an LSOA in the bottom 20% in the IDACI deprivation index. Totals do not include pupils who live outside of Bristol but attend a Bristol school. Excludes pupils who attend an independent school.

Suspension rates (source: Department for Education)

<https://explore-education-statistics.service.gov.uk/find-statistics/permanent-and-fixed-period-exclusions-in-england>

Summary of what the below data tells us:

Suspension rates were higher within SEN provision (both with and without EHC) in 2020/21; compared to “no SEN provision” category.



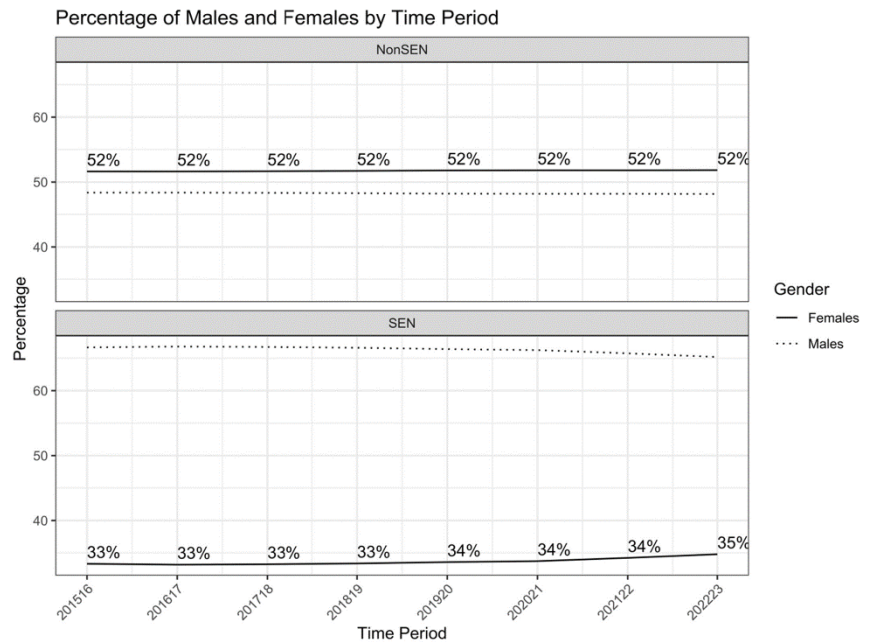
Gender differences in special educational needs identification, Daniel, J. & Wang, H.

Source:

<https://doi.org/10.1002/rev3.3437>

Summary of what the below data tells us:

Of the roughly 1.5 million children in English schools identified for SEN services in 2022-23, only 0.5 million were girls. The same pattern is seen across the country, with girls making up between 34% to 36% of all students accessing SEN support in most regions. In some cases, this may be because certain disabilities are more common in boys. But it is likely to be also down to gender bias in assessment and from those referring children for assessment, as well as girls being better at hiding the challenges they face from some conditions.



Local Area education performance (Early Years, School Age mainstream and specialist provision)

[Key stage 2 attainment: 2023 - GOV.UK \(www.gov.uk\)](#)

[Statistics: GCSEs \(key stage 4\) - GOV.UK \(www.gov.uk\)](#)

[Early years foundation stage profile results: 2022 to 2023 - GOV.UK \(www.gov.uk\)](#)

Summary of what this tells us:

National statistics published by the DfE on attainment outcomes for local authorities for early years foundation stage and at the end of Key stage 2 and Key stage 4. Includes a breakdown by characteristics including SEN provision.

The population of Bristol

Updated annually. The report brings together statistics on the current estimated population of Bristol, recent trends in population, future projections and looks at the key characteristics of the people living in Bristol.

Bristol Key Facts 2022

Population Profiles for Equalities Groups bring together detailed analysis looking at equalities groups and how they differ in relation to age, health, employment, education and housing, and maps the distribution of equalities groups across the city.

<u>Ward profile data (bristol.gov.uk)</u>	The Ward Profiles provide a range of data-sets, including population, life expectancy, health and education disparities etc. for each of Bristol's electoral wards.
<u>Joint Strategic Needs Assessment (JSNA)</u>	The Joint Strategic Needs Assessment reports on the health and wellbeing needs of the people of Bristol. It brings together detailed information on local health and wellbeing needs and looks ahead at emerging challenges and projected future needs. The JSNA is used to provide a comprehensive picture of the health and wellbeing needs of Bristol (now and in the future); to inform decisions about how we design, commission and deliver services, and also about how the urban environment is planned and managed; to improve and protect health and wellbeing outcomes across the city while reducing health inequalities; and to provide partner organisations with information on the changing health and wellbeing needs of Bristol, at a local level, to support better service delivery.
Children in Care Data	<p>There are currently 727 children in care, 57% are male and 43% female (compared to 51% and 49% of the overall child population). 9% have a disability (compared to 6.1% of the total Bristol child population) and the majority (73%) are aged 10-17.</p> <p>Ethnicity:</p> <ul style="list-style-type: none"> • 60% White (compared to 72% across the total Bristol child population) • 16% Mixed Race • 12% Other Ethnicity • 9% Black British • 3% Asian/Asian British <p>It is not possible to add other comparative data for the Bristol average child population due to the size and format of data sets.</p>
<i>Census 2021</i>	<ul style="list-style-type: none"> • 35.2% of Bristol population were economically inactive, of this, 14.5% are retired. New 2 year-old and under entitlement to 15 hours of free childcare for eligible parents can support parents to get into work. Therefore the new entitlement will support the structures needed to support parents' back into the world of work.
<i>Census 2021</i>	<ul style="list-style-type: none"> • Of the 67.5% of the population who were economically active, 10.4% work less than 16 hours a week. Eligibility for Tax Free Childcare is a minimum of 16 hours income at minimum wage, meaning that those who are employed and not on Universal Credit, nor eligible for Tax Free Childcare, will get no government support with the costs of wrap around childcare. New 2 year-old and under entitlement to 15 hours of free childcare for eligible parents can support parents to get into work
Bristol Key Facts 2021	<ul style="list-style-type: none"> • There is a 2.3% rise in employment levels in Bristol (Sept 21 compared to Dec 21) which shows that more citizens are gaining employment and will have a need for childcare. New

	<p>2 year-old and under entitlement to 15 hours of free childcare for eligible parents can support parents to get into work</p>
<p>Women’s Budget Group - 2023</p> <p>https://wbg.org.uk/analysis/uk-policy-briefings/spring-budget-2023-gender-and-early-education-and-childcare/</p>	<ul style="list-style-type: none"> An estimated 1.7M women are prevented from taking on more hours of paid work due to childcare issues. New 2 year-old and under entitlement to 15 hours of free childcare for eligible parents can support parents to get into work
<p>Universal Credit / Gov’s Back to Work schemes</p> <p>https://www.gov.uk/government/publications/jobseekers-allowance-back-to-work-schemes/universal-credit</p>	<p>The DWP is encouraging parents to return to work by removing barriers and providing financial support. In July 23 the implemented a monthly advance for childcare costs for parents on UC to enable them to start nursery (where payment is often required up front).</p>
<p>Women 7 times more likely than men to be out of work due to caring commitments TUC</p>	<ul style="list-style-type: none"> One in 10 women in their 30s – more than 450,000 women – is out of the labour market because of caring responsibilities – compared to just one in 100 men in their 30s. Women in their 30s are 10 times more likely than men to be unable to work due to family commitments at home. more than 1.46 million women are unable to work alongside their family commitments, compared to around 230,000 men. women are much more likely than men to be working in low-paid jobs – and are far less likely to be in high-paid work. Women make up two-thirds (65%) of the 10 lowest-paid occupations in the UK, like jobs in cleaning, catering and care. But less than two in five (39%) women are working in the 10 highest-paid occupations, in industries like finance, law and IT. The gender pay gap for all employees currently stands at 14.9%, and it widens with age. <p>New 2 year-old and under entitlement to 15 hours of free childcare for eligible parents can support women to return to work.</p>
<p>Additional comments:</p>	

2.2 Do you currently monitor relevant activity by the following protected characteristics?

<input checked="" type="checkbox"/> Age	<input checked="" type="checkbox"/> Disability	<input type="checkbox"/> Gender Reassignment
<input type="checkbox"/> Marriage and Civil Partnership	<input type="checkbox"/> Pregnancy/Maternity	<input checked="" type="checkbox"/> Race

2.3 Are there any gaps in the evidence base?

Where there are gaps in the evidence, or you don't have enough information about some equality groups, include an equality action to find out in section 4.2 below. This doesn't mean that you can't complete the assessment without the information, but you need to follow up the action and if necessary, review the assessment later. If you are unable to fill in the gaps, then state this clearly with a justification.

For workforce related proposals all relevant characteristics may not be included in HR diversity reporting (e.g. pregnancy/maternity). For smaller teams diversity data may be redacted. A high proportion of not known/not disclosed may require an action to address under-reporting.

Although our corporate approach is to collect diversity monitoring for all relevant characteristics, there are gaps in the available local diversity data for some characteristics, especially where this has not always historically been included in census and statutory reporting e.g. for sexual orientation. Given the way in which data is provided it is not possible to break down demographic breakdowns of this specific cohort without significant delay. Existing data and insight team do not have the capacity to develop this report within available timeframe, but pupil data will be monitored throughout the process to address any impacts on protected characteristics.

2.4 How have you involved communities and groups that could be affected?

You will nearly always need to involve and consult with internal and external stakeholders during your assessment. The extent of the engagement will depend on the nature of the proposal or change. This should usually include individuals and groups representing different relevant protected characteristics. Please include details of any completed engagement and consultation and how representative this had been of Bristol's diverse communities.

Include the main findings of any engagement and consultation in Section 2.1 above.

If you are managing a workforce change process or restructure please refer to [Managing change or restructure \(sharepoint.com\)](#) for advice on consulting with employees etc. Relevant stakeholders for engagement about workforce changes may include e.g. staff-led groups and trades unions as well as affected staff.

We launched a public consultation on our budget proposals between 9th November and 21 December. This consultation set out all the savings proposals we had identified to produce a balanced budget in the context of reduced available funding and increasing financial pressures.

We have completed consultation with all Early Years settings in relation to the funding in this area. Where it is in the local authority remit, we will explore opportunities to target funding to those groups which the evidence demonstrates face barriers to their educational achievement. However, the move to a national funding formula is reducing the scope we have locally to influence the funding formula. We believe that all pupils will benefit from a fairer distribution of funding. Where decisions may have a disproportionate impact on some children and young people because of the protected characteristics, appropriate engagement and consultation will ensure the views of service users, and groups that represent them are taken into account and help build a consensus around the case if any for change and that our statutory duties are complied with.

We consulted all schools via the Bristol Schools Forum on the proposals to transfer funding between the schools block and the High Needs Block, on the principles of the funding formula for mainstream schools and the arrangements for some central budgets for maintained mainstream schools.

All responses to the DSG Budget Consultation have been analysed and summarised in relevant Schools Forum reports that are published [Schools Forum \(bristol.gov.uk\)](#)

All responses to the Budget Consultation will be analysed and included in the Council's Budget report that will be published on the Bristol City Council website in early 2023. We will take Budget consultation responses into account when developing this and other final proposals to put to the Cabinet and a

meeting of the Full Council for approval. The final decision will be taken by Full Council at its budget setting meeting in February / March 2023.

Following the setting of the overall budget envelope there will be extensive engagement, consultation and co-design with affected communities on particular proposals which will inform future decision making prior to implementation. Our approach to public engagement and consultation will proactively target under-represented respondents to increase the participation of people from equality groups and their local representative organisations. This will help to ensure that our services and actions are informed by the views and needs of all our citizens, including the voice of young people.

2.5 How will engagement with stakeholders continue?

Explain how you will continue to engage with stakeholders throughout the course of planning and delivery. Please describe where more engagement and consultation is required and set out how you intend to undertake it. Include any targeted work to seek the views of under-represented groups. If you do not intend to undertake it, please set out your justification. You can ask the Equality and Inclusion Team for help in targeting particular groups.

Schools Forum will continue to engage in the budget developments through the main meetings and finance sub-group.

Steering Groups have been established to support the development and implementation of the DSG Management Plan. The Groups are focused on the Early Years Block and the High Needs Block. We have completed an engagement process regarding the proposed mitigations, as part of the developing DSG Management Plan and the implementation of the Delivering Better Value programme.

Step 3: Who might the proposal impact?

Analysis of impacts must be rigorous. Please demonstrate your analysis of any impacts of the proposal in this section, referring to evidence you have gathered above, and the characteristics protected by the Equality Act 2010. Also include details of existing issues for particular groups that you are aware of and are seeking to address or mitigate through this proposal. See detailed guidance documents for advice on identifying potential impacts etc. [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#)

3.1 Does the proposal have any potentially adverse impacts on people based on their protected or other relevant characteristics?

Consider sub-categories (different kinds of disability, ethnic background etc.) and how people with combined characteristics (e.g. young women) might have particular needs or experience particular kinds of disadvantage.

Where mitigations indicate a follow-on action, include this in the 'Action Plan' Section 4.2 below.

GENERAL COMMENTS (highlight any potential issues that might impact all or many groups)

Even when we plan to consult in more detail on specific service delivery proposals at a later time, we must ensure that any budget setting decisions that are likely to affect future services are informed by sufficient consultation and proper analysis. This is so that decision makers can have due regard to any likely disproportionate or negative impact on the basis of their protected and other relevant characteristics at the time the budget is approved – not afterwards.

Decision makers will have the ability to make changes to the individual spending plans following further consultation as appropriate and detailed evaluation of the impact of specific proposals. Within the

proposed budget envelope there will be financial mitigation put aside for any non-delivery or amendments to proposals which may occur due to future consideration of equalities issues or other factors.

As well as identifying whether budget changes will have a disproportionate impact on particular groups (e.g., because they are over-represented in a particular cohort), we need to pay particular attention to the risk of indirect discrimination: when an apparently neutral decision puts members of a given group at a particular disadvantage compared with other people because of their different needs and circumstances.

We are also aware of existing structural inequalities and particular considerations, issues, and disparities for people in Bristol based on their characteristics, which we will take into account.

Through the Local Authority's statutory role and duties, consideration is given to any adverse impact on children and young people, based on their protected characteristics. These duties include:

- Determination of the budgets for distribution to schools and early years settings, and allocation of the High Needs Block – all in the context of the National Funding Formula for each block.
- Commissioning of school places, personal education packages, alternative learning provision and post 16 education for children and young people we are responsible for.
- Responsibility for ensuring there are sufficient education places and the right types of education settings in our area.
- Arranging education for permanently excluded pupils, children and young people with EHCPs and Children in Care and others who, because of illness or other reasons, are unable to attend mainstream settings.
- Ensuring the Local Authority, schools and other partners are focused on safeguarding and promoting the welfare of children and young people with SEND up to age 25.
- Promoting and driving high standards in education across all types of educational provision.
- Establishing financial provision for children and young people with EHCPs
- Ensuring compliance with statutory duties associated with SEND legislation, safeguarding and Looked After Children/ Care Leavers.

There continues to be a risk that some groups or individuals from specific backgrounds are over-represented in Bristol's Disabled Children and Young People with SEND population. We know from Bristol's school census data that for school age children – boys are more likely to receive support for non-physical SEND needs than girls, whilst Black African children are more likely to be in receipt of non-statutory top-up funding at mainstream schools; and more likely to be at a special school. Mixed White and Black African/Caribbean children are also overrepresented, whilst White British children are underrepresented compared to the Bristol average. We also know that Disabled children with SEND are more likely to live in a deprived area and be eligible for free school meals.

The current high needs budget is finite, and if overspends continue, it risks destabilising the whole school system in Bristol. The council, schools, and their local partners therefore need to make vital changes to the way it uses its High Needs Block funds to meet pupils' needs earlier and more effectively and enable greater inclusion in mainstream schools.

Bristol continues to have a legal duty to provide funding for Children and Young People (CYP) with a statutory EHC plan. Local Authorities are required by law (Section 42 of the Children's and Families Act 2014) to secure special educational provision and health care provision in accordance with an EHC plan.

Where an EHC plan is maintained for the child or young person, the local authority must make sure that the special educational provision set out in it is delivered.

We will continue to monitor outcomes via demographic breakdowns and protected characteristics to see if the way we deliver SEND provision changes significantly. As well as identifying whether funding changes will have a disproportionate impact on particular groups, we need to pay particular attention to the risk of indirect discrimination: when an apparently neutral decision puts members of a given group at a particular disadvantage compared with other people because of their different needs and circumstances.

PROTECTED CHARACTERISTICS

Age: Young People Does your analysis indicate a disproportionate impact? Yes No

Potential impacts: Whilst rates for 2 year-olds and 3 & 4 years olds will be somewhat increased, this will not compensate for the inflationary pressures providers are experiencing and any historic deficits that they are carrying because of Covid-19, the increase of living costs and increases in teachers' pay awards. It is likely that more providers will find operating sustainably to be challenging and recruitment and retention of staff weakening. This will potentially lead to a reduction in sufficiency of places and reduce the quality of education.

Mitigations: Work is ongoing to ensure that Maintained Nursery Schools operate on a financially sustainable model. The increase in funding will support these measures and secure high-quality education in the most deprived areas of the city. In addition, we will continue to work with leaders across the city to design a financially sustainable model that will future-proof provisions as integral infrastructures of the city. A recruitment and retention task group is looking at a range of options to promote working in the early years sector. BCC is also using research and evidence from the university sector as well as any emerging practice nationally identified.

Age: Older People Does your analysis indicate a disproportionate impact? Yes No

Potential impacts: NA

Mitigations: NA

Disability Does your analysis indicate a disproportionate impact? Yes No

Potential impacts: The High Needs budget is being set on the basis of existing policies and existing rates to settings, with forecast levels of demand. The budget proposals, as they stand, represent no change on existing practice or funding rates, but the programme will seek to understand and address areas where outcomes for Disabled children and young people are not good.

Mitigations: See general comments above

Sex Does your analysis indicate a disproportionate impact? Yes No

Potential impacts: Boys are more likely to be receiving support for SEND needs than girls for all non-physical needs.

Women are likely to be impacted by the additional funding in Early Years. This is supported by the below evidence:

- One in 10 women in their 30s – more than 450,000 women – is out of the labour market because of caring responsibilities – compared to just one in 100 men in their 30s. Women in their 30s are 10 times more likely than men to be unable to work due to family commitments at home.
- more than 1.46 million women are unable to work alongside their family commitments, compared to around 230,000 men.
- women are much more likely than men to be working in low-paid jobs – and are far less likely to be in high-paid work.
- Women make up two-thirds (65%) of the 10 lowest-paid occupations in the UK, like jobs in cleaning, catering and care.
- But less than two in five (39%) women are working in the 10 highest-paid occupations, in industries like finance, law and IT.
- The gender pay gap for all employees currently stands at 14.9%, and it widens with age.

	<ul style="list-style-type: none"> An estimated 1.7M women are prevented from taking on more hours of paid work due to childcare issues.
Mitigations:	<p>Any decisions around meeting needs of CYP with SEND will need to ensure we consider their wellbeing and clearly evidence how any provision of additional support promotes their wellbeing and doesn't impact on their Human Rights. Any decisions need to be on individual case by case basis. Detailed evidence will be gathered as part of the updated process, with increased resourcing to manage and ensure this. We will also be improving the monitoring and oversight of how the targeted support fund is used and its impact – this will included monitoring of protected characteristics which will enable us to reflect and adjust practice accordingly to tackle these disparities; aided by the targeted approach possible with the new fund</p> <p>New 2 year-old and under entitlement to 15 hours of free childcare for eligible parents can support parents to get into work</p>
Sexual orientation	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	
Mitigations:	NA
Pregnancy / Maternity	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	NA
Mitigations:	NA
Gender reassignment	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	NA
Mitigations:	NA
Race	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<p>The population of Bristol has become increasingly diverse, and some local communities have changed significantly. There are now at least 45 religions, at least 180 countries of birth and at least 91 main languages spoken. The proportion of the overall Black, Asian and minoritised ethnic population has increased from 16% (2011) to 18.9% (2021) •</p> <p>Whilst we do not think that the overall budget setting should have a disproportionate impact on Race we are aware of existing disparities for Black, Asian and minority ethnic pupils. The 2017 Runnymede Report “Bristol - a city divided?” found ethnic minorities in Bristol experience greater disadvantage than in England and Wales as a whole in education and this is particularly so for Black African people. Black African young people are persistently disadvantaged in education compared to their White peers and addressing educational inequalities requires attention to the unrepresentativeness of the curriculum, lack of diversity in teaching staff and school leadership and poor engagement with parents.</p> <p>Although Bristol has low rates of permanent exclusion it has one of the highest rates for fixed term exclusions of any local authority in England, and a disproportionately high percentage of school pupils from Black, Asian and minority ethnic backgrounds have had one or more fixed term exclusion, compared to other English core cities and nationally. Nationally Gypsy and Roma, and Traveller of Irish Heritage pupils have the highest school exclusion rates (both permanent and temporary) however Mixed White and Black Caribbean, and Black Caribbean pupils also have high exclusion rates, and both are nearly three times as likely to be permanently excluded as White British pupils.</p> <p>There is an urgent need to recruit more Black Asian and ethnic minority teachers and teaching staff in Bristol. A 2018 BBC report⁴ found that of the 1,300 teachers in Bristol, only 26 were Black, equating to less than two per cent. Local stakeholder engagement suggests schools may indirectly discriminate against Black, Asian and minority ethnic pupils due to lack of cultural competence. Rules about appearance may penalise pupils who dress differently or have different hairstyles. Conduct rules may not take into account the diversity of culture around language and ways of</p>

	<p>demonstrating inter-generational respect.</p> <p>Other research indicates Black and Mixed ethnicity pupils in England (especially boys) are frequently associated by school staff with criminality, violence and hypersexuality e.g. groups of friends and siblings labelled as a 'gang'5. Youth workers and education professionals in Bristol have told us that Black pupils may struggle to understand their own cultural identity. Just as there is a disproportionately high 'stop and search' rate of ethnic minority young people by police, Black, Asian and minority ethnic school children may face additional discrimination because of their visibility.</p>
Mitigations:	Any decisions around meeting needs of CYP with SEND will need to ensure we consider their wellbeing and clearly evidence how any provision of additional support promotes their wellbeing and doesn't impact on their Human Rights. Any decisions need to be on individual case by case basis. Detailed evidence will be gathered as part of the updated process, with increased resourcing to manage and ensure this. We will also be improving the monitoring and oversight of how the targeted support fund is used and its impact – this will include monitoring of protected characteristics which will enable us to reflect and adjust practice accordingly to tackle these disparities; aided by the targeted approach possible with the new fund.
Religion or Belief	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	
Mitigations:	Na
Marriage & civil partnership	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	
Mitigations:	NA
OTHER RELEVANT CHARACTERISTICS	
Socio-Economic (deprivation)	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	Disabled children with SEND are more likely to live in a deprived area and be eligible for free school meals. Significant majorities of children classed as SEMH are on free school meals across genders, in both mainstream and special schools, and regardless of ECHP status. In mainstream schools there more children on free school meals classed as ASD, although this effect disappears in special schools.
Mitigations:	<p>In setting this Budget we are acutely aware of existing disparities for pupils living in areas of deprivation and low income households. Whilst there is limited scope to address systemic issues in this budget setting we have considered socio-economic inequality as far as possible and will continue to do so as part of ongoing service design and commissioning. There is a deprivation measure (based on IDACI) applied to the supplements provided to Early Years settings.</p> <p>Any decisions around meeting needs of CYP with SEND will need to ensure we consider their wellbeing and clearly evidence how any provision of additional support promotes their wellbeing and doesn't impact on their Human Rights. Any decisions need to be on individual case by case basis. Detailed evidence will be gathered as part of the updated process, with increased resourcing to manage and ensure this. We will also be improving the monitoring and oversight of how the targeted support fund is used and its impact – this will included monitoring of socio-economic status which will enable us to reflect and adjust practice accordingly to tackle these disparities; aided by the targeted approach possible with the new fund.</p>
Carers	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	As above any negative impact on Early Years settings may restrict the range of provision available which would have a disproportionate impact on carers.

	<ul style="list-style-type: none"> • An estimated 1.7M women are prevented from taking on more hours of paid work due to childcare issues. • 59% of unpaid carers are women (Census 2021). Women are more likely to become carers and to provide more hours of unpaid care than men. More women than men provide high intensity care at ages when they would expect to be in paid work (Petrillo and Bennett, 2022)
Mitigations:	<ul style="list-style-type: none"> • New 2 year-old and under entitlement to 15 hours of free childcare for eligible parents can support parents to get into work
Other groups [Please add additional rows below to detail the impact for other relevant groups as appropriate e.g. Asylums and Refugees; Looked after Children / Care Leavers; Homelessness]	
Children in Care	
Potential impacts:	<p>Children in care experience worse academic outcomes compared to the general population. Bristol is currently the corporate parent of nearly 800 children and young people. Circa 45% of these individuals have an identified Special Educational Need (far higher than the general population), with around half of these receiving support via a statutory Education, Health and Care Plan (EHCP); the other half receiving non-statutory top-up funding.</p> <p>Through our engagement we heard that any changes to top-up needs to be considerate of those who may be involved in the children’s social care system. Tightening of the top-up application needs to be considerate of those in receipt of the higher end of the top-up which includes those involved in youth justice support, whilst funding decision makers also need to be mindful of where there is family neglect and parents/carers not identifying needs earlier resulting in higher cost late applications for funding.</p> <p>SEMH is considered common for Children in Care (CIC) due to the trauma they have experienced. There are two contrary outcomes here. On one hand reducing non-statutory funding may result in CIC being less able to access support and funding. On the other hand, some conversations have suggested that EHCPs are leveraged for this cohort as a way to move these young people onto other settings, excluding them from mainstream education. By providing more targeted funding for these needs and this cohort; it may increase schools’ ability to provide inclusive support.</p>
Mitigations:	As above

3.2 Does the proposal create any benefits for people based on their protected or other relevant characteristics?

Outline any potential benefits of the proposal and how they can be maximised. Identify how the proposal will support our [Public Sector Equality Duty](#) to:

- ✓ Eliminate unlawful discrimination for a protected group
- ✓ Advance equality of opportunity between people who share a protected characteristic and those who don’t
- ✓ Foster good relations between people who share a protected characteristic and those who don’t

The scale of the potential gap in our core funding means that there is very limited opportunity to bring genuine additional benefit to equalities groups in the circumstances. However, we have considered as far as possible the need to: eliminate discrimination, harassment, victimisation and any other conduct prohibited under the Equality Act 2010; advance equality of opportunity between people from different groups; and foster good relations between people from different groups.

Our Dedicated Schools Grant management plan proposals are aligned to our Corporate Strategy and although we have limited resources our future focus will be on achieving those priorities, we have identified including tackling poverty and intergenerational inequality.

As a result of the increased funding for entitlement for 2 year olds and 3 and 4 year olds, there will be small benefits gained for early years children like eliminating discrimination. Some children may now have access to provision that may not have been accessible prior to the entitlement allowance to early year settings.

Women would be at an advantage due to the increase in Early Years entitlement as this would enable mothers to seek, gain or return back into employment for some hours, this would positively impact the economy and significantly improve well-being and for some, their mental health.

Step 4: Impact

4.1 How has the equality impact assessment informed or changed the proposal?

What are the main conclusions of this assessment? Use this section to provide an overview of your findings. This summary can be included in decision pathway reports etc.

If you have identified any significant negative impacts which cannot be mitigated, provide a justification showing how the proposal is proportionate, necessary, and appropriate despite this.

Summary of significant negative impacts and how they can be mitigated or justified:

none

Summary of positive impacts / opportunities to promote the Public Sector Equality Duty:

The early years nursery free entitlement places for two, three and four year-olds of 15 hours of free childcare for eligible parents can support parents to get into work. Women can benefit from this as they are disproportionately impacted by caring responsibilities and thus can be prevented from working.

4.2 Action Plan

Use this section to set out any actions you have identified to improve data, mitigate issues, or maximise opportunities etc. If an action is to meet the needs of a particular protected group please specify this.


Improvement / action required	Responsible Officer	Timescale
All relevant EQIAs will be published on the Council's website https://www.bristol.gov.uk/council-spending-performance/council-budgets and continue to be updated as appropriate.		Ongoing
Ongoing monitoring of the service with inclusion of voice of young people	Head of Service	Ongoing
Ongoing review of EQIA as the Dedicated Schools Grant (DSG) mitigations are implemented	Head of Service	Ongoing
Completion of any EQIAs specific to any policy changes	Commissioning	Ongoing
Inclusion of equalities question in the tender process to ensure the provider will be inclusive and work from an equality's perspective.	Procurement	July 2023
Recruitment to Head of Service: inclusion to ensure rigour of implementation of the DSG mitigations	Director of Education	February 2024

4.3 How will the impact of your proposal and actions be measured?

How will you know if you have been successful? Once the activity has been implemented this equality impact assessment should be periodically reviewed to make sure your changes have been effective your approach is still appropriate.

Children and Young People with special educational needs and disability will have better outcomes and experiences, both educationally and in their life chances. Their voices and feedback will be captured via work within the service area of Inclusion and / or through surveys and the work that we complete with the Bristol Parent Carer Forum, Health Partners, Schools and wider partnerships. The recruitment of a head of service for inclusion will ensure that all contributory services for Inclusion are working cohesively, effectively and towards the same goals and ambitions outlined in the DSG deficit mitigations plan. The procurement of any commissioned delivery partners must be aligned to the Equalities Act 2010 to ensure an informed, diverse and equitable experience for everyone exposed to the work. As a result of the actions and implementing the EQIA, BCC should have a sustainable and financially healthy plan to reduce the deficit of the DSG.

The Equality and Inclusion Team need at least five working days to comment and feedback on your EqIA. EqIAs should only be marked as reviewed when they provide sufficient information for decision-makers on the equalities impact of the proposal. Please seek feedback and review from the [Equality and Inclusion Team](#) before requesting sign off from your Director¹.

Equality and Inclusion Team Review: Reviewed by the Equality and Inclusion Team	Director Sign-Off: 
Date: 16/01/2024	16/01/2024

¹ Review by the Equality and Inclusion Team confirms there is sufficient analysis for decision makers to consider the likely equality impacts at this stage. This is not an endorsement or approval of the proposal.

Title: 2024/25 HRA Budget Proposal.	
<input type="checkbox"/> Policy <input checked="" type="checkbox"/> Strategy <input type="checkbox"/> Function <input type="checkbox"/> Service <input type="checkbox"/> Other [please state]	<input type="checkbox"/> New <input checked="" type="checkbox"/> Already exists / review <input type="checkbox"/> Changing
Directorate: Housing and Landlord Services	Lead Officer name: Richard James
Service Area: Business Development	Lead Officer role: Interim Asset Management Consultant

Step 1: What do we want to do?

The purpose of an Equality Impact Assessment is to assist decision makers in understanding the impact of proposals as part of their duties under the Equality Act 2010. Detailed guidance to support completion can be found here [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#).

This assessment should be started at the beginning of the process by someone with a good knowledge of the proposal and service area, and sufficient influence over the proposal. It is good practice to take a team approach to completing the equality impact assessment. Please contact the [Equality and Inclusion Team](#) early for advice and feedback.

1.1 What are the aims and objectives/purpose of this proposal?

Briefly explain the purpose of the proposal and why it is needed. Describe who it is aimed at and the intended aims / outcomes. Where known also summarise the key actions you plan to undertake. Please use plain English, avoiding jargon and acronyms. Equality Impact Assessments are viewed by a wide range of people including decision-makers and the wider public.

Budget context

Every year, Bristol City Council (BCC) must agree an annual budget which balances the money we spend with the money we are expecting to receive. Councils across the country are continuing to face financial challenges, reflecting the economic context, including the significant inflationary environment, combined with continuing demand pressures and limitations on government funding. Based on our current forecasts, we face a funding gap over the next five years (to 2028/29) of £32.2 million. This is in addition to the £17.7 million of savings and efficiencies proposals for 2024-2028 outlined in the 2023/24 budget and assumed delivery of 2023/24 savings in the current year.

The Council has defined statutory responsibilities, but deliver against a far broader agenda, providing universal services benefiting the whole community, and targeted services aimed at individuals, communities with particular needs, and businesses – administered by our workforce, city partners, stakeholder organisations and commissioned services.

To address these challenges we are looking across all of our services with a focus on:

- maximising our transformation programmes – where we are looking to improve services whilst achieving the best value for money
- income opportunities – where we are looking to improve our external income and most effectively apply that income
- targeted reviews – where we are looking at services that are comparatively high in cost compared to other councils to see where we can do things differently to reduce costs, be more efficient in how we do things and, in some cases, stop doing some things entirely

Objective

To support the recommendations/proposals for:

- The 2024/25 Housing Revenue Account (HRA) budget
- The 2024/25 Housing Investment Plan
- The 2024/25 Housing Delivery Programme
- The 5-year capital programme (medium-term financial plan)
- Increasing the supply of affordable homes
- The procurement of relevant contractors to support delivery of these programmes, and delegate the authority to the Executive Director of Growth and Regeneration, in consultation with the Cabinet Member for Housing Services & Energy and Housing Delivery & Homelessness, to appoint relevant contractors

Background to the Proposal

Housing and Landlord Services (H&LS) 30 year Business Plan and Budget focusses on:

- repairing, maintaining and improving the existing BCC council housing stock;
- this includes proposals responding to the Building and Fire safety Acts and upcoming Consumer Standards and proactive regulation.
- providing services for council tenants and leaseholders;
- and increasing the provision of new affordable council homes

The HRA operates in a difficult housing market and environment. The cost-of-living crisis is affecting our residents, and the cost of providing services, repairing and maintaining homes and building new homes. Levels of homelessness and rough sleeping are increasing, along with the number of households in temporary accommodation. Many tenants struggle to maintain their tenancies and access the support they require.

There are city ambitions for housing, that include increasing the supply of affordable housing and tackling the climate emergency and reducing carbon emissions.

The main source of HRA income is the rent and service paid by council tenants and leaseholders. From 2020 there was a new rent standard that allows social landlords to increase rent levels by up to the September CPI +1%. As a result, the maximum rent increase that BCC is able to implement for 2024/25 is 7.7%.

More detailed and specific EqIA's will be developed for individual operational activities.

1.2 Who will the proposal have the potential to affect?

<input checked="" type="checkbox"/> Bristol City Council workforce	<input checked="" type="checkbox"/> Service users	<input checked="" type="checkbox"/> The wider community
<input checked="" type="checkbox"/> Commissioned services	<input checked="" type="checkbox"/> City partners / Stakeholder organisations	
The proposal will affect everyone from residents as it will affect the service they receive, the workforce responsible for delivering the service, the wider community who are dependent on accessing council housing when needed and other partners who provide additional supporting services or who are contracted to deliver a service on behalf of Housing & Landlord Services		

1.3 Will the proposal have an equality impact?

Could the proposal affect access levels of representation or participation in a service, or does it have the potential to change e.g. quality of life: health, education, or standard of living etc.?

If 'No' explain why you are sure there will be no equality impact, then skip steps 2-4 and request review by Equality and Inclusion Team.

If 'Yes' complete the rest of this assessment, or if you plan to complete the assessment at a later stage please state this clearly here and request review by the Equality and Inclusion Team.

Yes **No** [please select]

Impact

The key principles for the 2024/25 budget and medium-term financial plan are:

- Rents and service charges increase by 7.7% (September CPI + 1%).
- Repair & Investment of existing homes: Continue to ensure our homes are decent; warm, weathertight, modern and safe remain key priorities.
- Retain the 2023/24 priorities and commitments to improve standards in individual homes, communal areas, blocks and estates. Including:
 - Energy efficiency and reducing carbon emissions: £80m to make homes more energy efficient and to reduce carbon emissions. This will enable us to work towards ensure all homes reach a minimum EPC of C by 2030. Additional funding than the £80m currently allocated will be required to ensure all BCC's homes achieve EPC C by 2030.
 - Bathroom modernisation programme: £82m 15 year bathroom replacement programme.
 - For 2024/25 up to £350k will be made available for council tenants in financial crisis, with applications managed through the council's Local Housing Crisis Prevention fund.
- New Homes: commitment to provide new affordable homes to meet housing need, and address homelessness and rough sleeping.
- New priorities to invest more in fire safety measures this includes waking watch, general fire remedial actions, evacuation alarms, the removal of EPS cladding and a sprinkler programme.

Procurement of Contractors

The report requests approval for delegated authority to procure contractors as necessary to support the delivery of proposed expenditure (including the Housing Investment Plan and New Build & Acquisition programme). This is a positive impact for the council and our tenants, as this proposal aims to make the procurement of contractors more efficient, meaning work programmes can be started earlier without the need for further approvals which can add additional costs to the budget.

Step 2: What information do we have?

2.1 What data or evidence is there which tells us who is, or could be affected?

Please use this section to demonstrate an understanding of who could be affected by the proposal. Include general population data where appropriate, and information about people who will be affected with particular reference to protected and other relevant characteristics: <https://www.bristol.gov.uk/people-communities/measuring-equalities-success>.

Use one row for each evidence source and say which characteristic(s) it relates to. You can include a mix of qualitative and quantitative data e.g. from national or local research, available data or previous consultations and engagement activities.

Outline whether there is any over or under representation of equality groups within relevant services - don't forget to benchmark to the local population where appropriate. Links to available data and reports are here [Data, statistics and intelligence \(sharepoint.com\)](#). See also: [Bristol Open Data \(Quality of Life, Census etc.\)](#); [Joint Strategic Needs Assessment \(JSNA\)](#); [Ward Statistical Profiles](#).

For workforce / management of change proposals you will need to look at the diversity of the affected teams using available evidence such as [HR Analytics: Power BI Reports \(sharepoint.com\)](#) which shows the diversity profile of council teams and service areas. Identify any over or under-representation compared with Bristol economically active citizens for different characteristics. Additional sources of useful workforce evidence include the [Employee Staff Survey Report](#) and [Stress Risk Assessment Form](#)

Data / Evidence Source [Include a reference where known]	Summary of what this tells us
<p>Demographic of tenants: H&LS has c.33,500 tenants living in c.27, 000* properties. It is estimated that in total H&LS houses over 60,000 people. In addition, there are c.2,350 leaseholders leasing c.1,800 properties.</p> <p>(This is all HRA homes except for those sold to leaseholders; therefore it includes those let under secure tenancies, introductory tenancies, licences or temporary accommodation etc).</p>	<p>The ethnicity of 89% of tenants is known, of those: 62% are White British.</p> <p>c.21% are of Black, Asian or Minority Ethnicity, of which the largest groups are Black Africans and African Somalis 4% are White Other.</p> <p>A higher proportion of our tenants are female (61%) and male (37%). Not known or stated and prefer not to say (2%)</p> <p>The age of 94% of tenants is known; of these the most common age bands is 45–54-year-olds (20%) and 55-64 years (21%). 22% of our tenants are aged over 65, and 2% under 25.</p> <p>29% of our tenants have told us that they are Disabled people. 13% of our tenants report a long-term illness, 13% experience mental or emotional distress and 13% of our tenants report mobility problems. 16% of our tenants have hearing, mobility or visual impairment.</p> <p>When compared to the Bristol population as a whole the differences include older people, aged 65+, make up 13% of Bristol’s population compared to 22% of BCC tenants, and women make up 50% of Bristol’s population compared to 61% of BCC tenants.</p>
<p>Rent Arrears: Overall, 24.3% of tenants have rent arrears over £250. This is 1.9% higher than 23/24.</p>	<p>30.32% of tenants from Black, Asian or Minority Ethnic backgrounds have rent arrears over £250, compared to 22.7% of White British tenants and 20.47% of White Other tenants.</p> <p>25.46% of female tenants are in arrears over £250 compared to 22.27% of male tenants.</p> <p>Younger tenants are at higher risk of arrears than older tenants. 44.82% of under 25’s are in arrears over £250, 9.40% of tenants aged 65-74 are.</p> <p>Disabled tenants are less likely to be in arrears with 19.27% having rent arrears over £250.</p>

<p>Response Repairs: In the year 1st November 2022- 31st October 2023 there were c.77,000 response repairs orders completed.</p>	<p>Middle-aged tenants were most likely to request repairs with an average of 35-44 22% & 45-54 22% & 55-64 21% compared with over 65 which was 21% and 34 and below at 14%. White British tenants have c.62% of repairs compared with 28% of Black, Asian and minority ethnic tenants.</p>
<p><u>Bristol One City: Cost of Living Crisis – Bristol’s One City approach to supporting citizens and communities (Oct 2022)</u></p> <p><u>Cost of Living Risk Index (arccgis.com)</u></p>	<p>The rising cost of living is not impacting on everyone equally. People who are already experiencing inequity and poverty will be disproportionately impacted:</p> <ul style="list-style-type: none"> • People on the lowest incomes - will have less available income but also pay more for the same services. For example, people unable to pay their bills by Direct Debit and those borrowing money are subject to higher costs and interest rates. This is what anti-poverty campaign group Fair by Design has referred to as a Poverty Premium • Households with pre-payment energy meters - households with pre-payment meters often pay above-average costs for their fuel. They will face a significant rise in their monthly bills in autumn and winter with increased energy usage as they do not benefit from the “smoothing” effect of Direct Debits, which spread usage costs evenly across the year. • Parents and young families – parents of young children are more likely to seek credit and alternative support as they are less able, on average, to afford an unexpected expense. Single parents will be disproportionately affected; and one in four single parents find it difficult to manage financially (28.6%). • Disabled people – just under half of all people in poverty in the UK are Disabled people or someone living with a Disabled person. Disabled people have higher living costs, and tend to pay more for their heating, travel, food/diet, prescription payments, and specialist equipment. It is estimated that UK households that include Disabled children pay on average £600 more for their energy bills than an average household • Black and Minoritised people – A higher proportion of Black and minoritised ethnic groups reported finding it difficult to manage financially (14.9%) in 2021. In 2020 the Social Metrics Commission found that almost half of people living in a family in the UK where the head of the household is Black are in poverty. Age UK report that poverty among older Black and minoritised ethnic groups is twice as high as for white pensioners • People in rented accommodation – it is estimated that 69% of low-income private renters in England will be forced to go without food and heating at least one day per week to meet rising housing and living cost. Almost three in ten homes in Bristol are privately rented • Underserved populations - It is likely that populations that are not typically well represented in data and research are likely to also face increased risk from rising cost of living.

For example, refugees and asylum seekers, people experiencing homelessness, and Gypsy/Roma/Traveller groups.

Cost of Living Risk Index (October 2022) identified Lawrence Hill, Hartcliffe & Withywood, Filwood, Lockleaze, Ashley, Southmead, Easton, Avonmouth & Lawrence Weston, Hillfields and Eastville as neighbourhoods in Bristol more at risk of the impact of the cost-of-living crisis.

Bristol Quality of Life Survey 2021-22
(A Bristol Quality of Life Survey was
undertaken in 2023/24 and result will
be available from March 2024)

The Quality of Life (QoL) survey is an annual randomised sample survey of the Bristol population, mailed to 33,000 households (with online & paper options), and some additional targeting to boost numbers from low responding groups. In brief, the most recent QoL survey indicated that inequality and deprivation continue to affect people’s experience in almost every element measured by the survey.

The Quality of Life 2021/22 data dashboard highlights those indicators, wards and equality and demographic groups which are better or worse than the Bristol average.

For example there are significant disparities based on people’s characteristics and circumstances in the extent to which they find it difficult to manage financially:

Quality of Life Indicator	% who find it difficult to manage financially
16 to 24 years	12.5
50 years and older	6.7
65 years and older	3.2
Female	8.6
Male	8.5
Disabled	21.6
Asian /Asian British	9.9
Black/Black British	19.8
Mixed/Multiple Ethnicity	16.3
White British	7.8
White Minority Ethnic	8.4
Lesbian Gay or Bisexual	12.7
No Religion or Faith	8.0
Christian Religion	8.3
Other Religions	18.2
Carer	10.7
Full Time Carer	14.0
Part Time Carer	9.7
Single Parent	28.6
Two Parents	9.6

	Parent (all)	12.0
	No Qualifications	10.0
	Non-Degree Qualified	12.9
	Degree Qualified	6.7
	Rented (Council)	20.3
	Rented (HA)	20.6
	Rented (Private)	14.6
	Owner Occupier	4.6
	Most Deprived 10%	18.8
	Bristol Average	8.7
Additional comments:		

2.2 Do you currently monitor relevant activity by the following protected characteristics?

<input checked="" type="checkbox"/> Age	<input checked="" type="checkbox"/> Disability	<input type="checkbox"/> Gender Reassignment
<input type="checkbox"/> Marriage and Civil Partnership	<input type="checkbox"/> Pregnancy/Maternity	<input checked="" type="checkbox"/> Race
<input type="checkbox"/> Religion or Belief	<input checked="" type="checkbox"/> Sex	<input type="checkbox"/> Sexual Orientation

2.3 Are there any gaps in the evidence base?

Where there are gaps in the evidence, or you don't have enough information about some equality groups, include an equality action to find out in section 4.2 below. This doesn't mean that you can't complete the assessment without the information, but you need to follow up the action and if necessary, review the assessment later. If you are unable to fill in the gaps, then state this clearly with a justification.

For workforce related proposals all relevant characteristics may not be included in HR diversity reporting (e.g. pregnancy/maternity). For smaller teams diversity data may be redacted. A high proportion of not known/not disclosed may require an action to address under-reporting.

We don't currently hold or collect data on gender reassignment or pregnancy/maternity for our residents. It is not currently felt that this data would improve our services to those groups. We don't have an active programme of updating disability data on our residents. We plan to be more proactive with undertaking tenancy audits which will collect this data. We will also collect this data when letting a home or part of a transfer / rehousing request. The move to NEC will involve a data audit which will be used to improve the equalities data held.

2.4 How have you involved communities and groups that could be affected?

You will nearly always need to involve and consult with internal and external stakeholders during your assessment. The extent of the engagement will depend on the nature of the proposal or change. This should usually include individuals and groups representing different relevant protected characteristics. Please include details of any completed engagement and consultation and how representative this had been of Bristol's diverse communities. See <https://www.bristol.gov.uk/people-communities/equalities-groups>.

Include the main findings of any engagement and consultation in Section 2.1 above.

If you are managing a workforce change process or restructure please refer to [Managing change or restructure \(sharepoint.com\)](#) for advice on consulting with employees etc. Relevant stakeholders for engagement about workforce changes may include e.g. staff-led groups and trades unions as well as affected staff.

In 2021 we launched a consultation open to all Bristol residents and council employees to seek their view on how to fund additional investments within a 30 year business plan, the first year of this plan informed the budget for 22/23, 23/24 & 24/25. The consultation was open for six weeks.

We had responses from 1,471 people and approximately 60% were tenants in one of our properties. Participants could either use an online simulator tool which provided a realistic simulation of the budget decisions we need to make or take part in a survey that was available online, by telephone survey and by post. In line with BCC policy If during any consultation we identify a Disabled resident or language barrier that was impacting their ability to engage we would bring in support such as translation services to support the resident.

The above results will inform decision making for this internal review of the HRA budget proposals.

2.5 How will engagement with stakeholders continue?

Explain how you will continue to engage with stakeholders throughout the course of planning and delivery. Please describe where more engagement and consultation is required and set out how you intend to undertake it. Include any targeted work to seek the views of under-represented groups. If you do not intend to undertake it, please set out your justification. You can ask the Equality and Inclusion Team for help in targeting particular groups.

We will write to residents informing them on the rent increase decision. If required, we are able to adapt the letter to make it more accessible and provide translation services. We will continue to signpost and refer tenants for debt and financial support.

There is currently a Housing Management Board that includes council tenant representation on it to ensure strategic engagement in the work of housing and landlord services. There are also tenant forums open to all tenants that meet several times a year, which is an opportunity for residents to raise important issues. The Big Housing Conversation will continue to be used as an engagement tool with residents throughout the lifetime of the current administration.

We are developing a resident engagement strategy for Building Safety which will describe how we will engage with residents regarding building safety on an ongoing basis.

Step 3: Who might the proposal impact?

Analysis of impacts must be rigorous. Please demonstrate your analysis of any impacts of the proposal in this section, referring to evidence you have gathered above and the characteristics protected by the Equality Act 2010. Also include details of existing issues for particular groups that you are aware of and are seeking to address or mitigate through this proposal. See detailed guidance documents for advice on identifying potential impacts etc. [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#)

3.1 Does the proposal have any potentially adverse impacts on people based on their protected or other relevant characteristics?

Consider sub-categories (different kinds of disability, ethnic background etc.) and how people with combined characteristics (e.g. young women) might have particular needs or experience particular kinds of disadvantage.

Where mitigations indicate a follow-on action, include this in the 'Action Plan' Section 4.2 below.

GENERAL COMMENTS (highlight any potential issues that might impact all or many groups)

In general any increase in rent and service charges during a cost of living crisis is likely to have a disproportionate impact on low income households experiencing food and fuel poverty, unless this is

adequately mitigated through other initiatives such as the local crisis prevention fund (LCPF) and the Household Support Fund (HSF).

There are no proposals to reduce housing management services for 2024/25.

Analysis demonstrates that some groups disproportionately affected by rent arrears. With the cost-of-living crisis it's important that we:

- Promote opportunities to apply for benefits and to sign post residents to support
- Monitor the impact of the rent increase and its impact of younger people; Black, Asian and Minority Ethnic communities; and women.

For residents with rent arrears, Income Officers will engage with residents on a one to one basis and take into account residents specific to individuals circumstances.

Our Asset Management Strategy has an EQIA in place to mitigate against negative impacts in relation to our investment decisions. We complete EQIAs before procuring each of the major refurbishment projects, and when reviewing our standards and developing new approaches to investment to maximise positive impacts and mitigate against any potential adverse impacts.

PROTECTED CHARACTERISTICS

Age: Young People	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	Rent Increase
Mitigations:	Monitor the impact of the rent increase. For 2024/25 up to £350k will be made available for council tenants in financial crisis, with applications managed through the council's Local Housing Crisis Prevention fund.
Age: Older People	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	Rent increase
Mitigations:	Some older people receive a pension that increases with the rate of inflation. Promote opportunities to apply for benefits and to sign post residents to support.
Disability	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	There may be a disproportionate impact on increased rent to Disabled tenants. One in five Disabled adults faces extra costs of over £1,000 a month even after they have received welfare payments designed to meet those costs ¹ . Income Officers undertake proactive contact with residents in rent arrears. They will work individually with residents and sign posts to specialist support if required.
Mitigations:	Monitor the impact of the rent increase. Promote opportunities to apply for benefits and to sign post residents to support, and staggered payments options. For 2024/25 up to £350k will be made available for council tenants in financial crisis, with applications managed through the council's Local Housing Crisis Prevention fund.
Sex	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	Rent increase: Women are more likely to be rent arrears - the impact of the rent increase.
Mitigations:	Promote opportunities to apply for benefits and to sign post residents to support, and staggered payments options. For 2024/25 up to £350k will be made available for council tenants in financial crisis, with applications managed through the council's Local Housing Crisis Prevention fund.

¹ Disability Price Tag | Disability charity Scope UK

Sexual orientation	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	Rent increase
Mitigations:	Promote opportunities to apply for benefits and to sign post residents to support, and staggered payments options. For 2024/25 up to £350k will be made available for council tenants in financial crisis, with applications managed through the council's Local Housing Crisis Prevention fund.
Pregnancy / Maternity	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	We do not have the data on the proportion of tenants who are pregnant, however rent increase may have a disproportionate impact due to the cumulative effect of other increased costs.
Mitigations:	Promote opportunities to apply for benefits and to sign post residents to support, and staggered payment options. For 2024/25 up to £350k will be made available for council tenants in financial crisis, with applications managed through the council's Local Housing Crisis Prevention fund.
Gender reassignment	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	We do not have the data for the group
Mitigations:	
Race	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	Rent Increase- Black, Asian and Minority Ethnic tenants are more likely to be in rent arrears - the impact of the rent increase. In line with BCC policy, translation services are available to residents upon request. If a BCC Officer identifies any language barrier they will proactively engage with translation support.
Mitigations:	Promote opportunities to apply for benefits and to sign post residents to support, and staggered payment options. For 2024/25 up to £350k will be made available for council tenants in financial crisis, with applications managed through the council's Local Housing Crisis Prevention fund.
Religion or Belief	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	
Mitigations:	
Marriage & civil partnership	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	
Mitigations:	
OTHER RELEVANT CHARACTERISTICS	
Socio-Economic (deprivation)	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	See general comments above – increased rents are likely to have a disproportionate impact on low-income households unless this is adequately mitigated through other initiatives.
Mitigations:	Promote opportunities to apply for benefits and to sign post residents to support, and staggered payments. For 2024/25 up to £350k will be made available for council tenants in financial crisis, with applications managed through the council's Local Housing Crisis Prevention fund.
Carers	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	
Mitigations:	
Other groups [Please add additional rows below to detail the impact for other relevant groups as appropriate e.g. Asylums and Refugees; Looked after Children / Care Leavers; Homelessness]	
Potential impacts:	

Mitigations:	
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3.2 Does the proposal create any benefits for people based on their protected or other relevant characteristics?

Outline any potential benefits of the proposal and how they can be maximised. Identify how the proposal will support our Public Sector Equality Duty to:

- ✓ Eliminate unlawful discrimination for a protected group
- ✓ Advance equality of opportunity between people who share a protected characteristic and those who don't
- ✓ Foster good relations between people who share a protected characteristic and those who don't

This proposal does have some benefits for our tenants in the following ways:

- **Repair & Investment:** continue to focus on our priorities previously identified by tenants including providing warm and reducing fuel poverty, ensuring homes are safe and on key elements such as kitchens. This benefits older and disabled tenants for whom the cold may be a particular issue, and recognises that many of the protected characteristic groups are more likely to live below the poverty line.
- **New Homes:** Women, Black and minority ethnic people, and Disabled people are overrepresented as both households seeking homelessness prevention advice and on the housing register. Addressing housing needs by providing more homes is therefore beneficial in addressing inequalities. In addition, new homes bring in a new income stream, safeguarding future income and service provision for all tenants.
- **Fire Safety:** The profile of residents varies from block to block, but in some block the following groups are over-represented: older people or Black, Asian and Minority Ethnic tenant. Additional funding for fire safety precautions and improvements increases demonstrates our commitment to safety.
- **Service provision:** continue to focus on provision of low-cost housing that supports tenants and focusses services on the most vulnerable whilst considering impacts on estates and neighbourhoods.
- **Procurement of Contractors:** The city council tendering process will assess potential contractors on a range of factors including how they bring social value and the level of customer care offered.

We are also mindful that because Disabled, and Black, Asian and Minority ethnic communities are over represented in seeking homelessness prevention advice, on the housing register and particularly they are more likely to be in rent arrears, this proposal may not be promoting equality of opportunity and therefore we need to ensure that outlined mitigations and actions plans are carried through.

Step 4: Impact

4.1 How has the equality impact assessment informed or changed the proposal?

What are the main conclusions of this assessment? Use this section to provide an overview of your findings. This summary can be included in decision pathway reports etc.

If you have identified any significant negative impacts which cannot be mitigated, provide a justification showing how the proposal is proportionate, necessary, and appropriate despite this.

Summary of significant negative impacts and how they can be mitigated or justified:

For tenants who are in rent areas this proposal will influence their current debt situation. We will be mindful that support should be put in place for those who have been identified as having existing arrears and help from appropriate services will be forthcoming.

Summary of positive impacts / opportunities to promote the Public Sector Equality Duty:

The equalities impact assessment has reinforced existing knowledge that service provision is not always able to respond flexibly and effectively to the different needs of groups with protected characteristics. Focussing on maximising income, improving services and increasing the provision of homes is a targeted approach to addressing inequalities.

4.2 Action Plan

Use this section to set out any actions you have identified to improve data, mitigate issues, or maximise opportunities etc. If an action is to meet the needs of a particular protected group please specify this.

Improvement / action required	Responsible Officer	Timescale
Maximise service charge income to enable future improvements. Delivered through a review of service charges, this will require a further equality impact assessment	Miles Tilling	March 2025
Identify homes that are poor performing (require high levels of future investment and/or have low levels of tenant satisfaction) and carry out option appraisal regarding their future. To be undertaken following the delivery of 20K stock condition surveys to be undertaken over the next 2 years.	Miles Tilling	March 2026
Complete the external review of our preparedness for the upcoming Consumer Standards and develop an improvement plan responding to any areas requiring improvement.	Miles Tilling	March 2024
We do not have data for tenants with the following protected characteristic: gender reassignment, pregnancy and maternity, religion & belief, sexual orientation and marriage and civil partnership. We need to consider whether the data is relevant and will be useful to help tailor and improve our services	Miles Tilling	March 2024

4.3 How will the impact of your proposal and actions be measured?

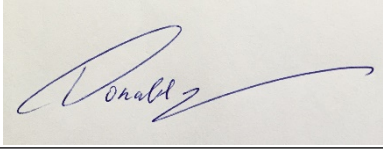
How will you know if you have been successful? Once the activity has been implemented this equality impact assessment should be periodically reviewed to make sure your changes have been effective your approach is still appropriate.

- Key Performance Indicators will be used to monitor the contractor's performance.
- Monitor the complaints and identify systemic failures and lessons learned
- Continue to collect asset intelligence, proactive surveys, identify urgent priorities, assess information and feed into investment plan to ensure we have good sound knowledge and data of our homes.
- Carry out ongoing equalities monitoring and impact assessments for specific projects.
- Levels of rent arrears, have they increased and for which equality group, and in relation to housing register demographics

Step 5: Review

The Equality and Inclusion Team need at least five working days to comment and feedback on your EqIA. EqIAs should only be marked as reviewed when they provide sufficient information for decision-makers on the equalities

impact of the proposal. Please seek feedback and review from the Equality and Inclusion Team before requesting sign off from your Director².

Equality and Inclusion Team Review: <i>Reviewed by Equality and Inclusion Team</i>	Director Sign-Off: Donald Graham, Director Housing and Landlord Services 
Date: 12/1/2024	Date: 12/01/2024

² Review by the Equality and Inclusion Team confirms there is sufficient analysis for decision makers to consider the likely equality impacts at this stage. This is not an endorsement or approval of the proposal.

Equality Impact Assessment [version 2.10]



Title: 23/24-CEN001 Rebaselining Fees and Charges Budgets	
<input checked="" type="checkbox"/> Budget Proposal	<input type="checkbox"/> New <input checked="" type="checkbox"/> Already exists / review <input type="checkbox"/> Changing
Directorate: Growth & Regeneration, Children's & Education and Resources	Lead Officer name: Vanessa Wilson, John Smith, Tim O'Gara supported by Sarah Chodkiewicz
Service Area: Various	Lead Officer role: Various

Step 1: What do we want to do?

The purpose of an Equality Impact Assessment is to assist decision makers in understanding the impact of proposals as part of their duties under the Equality Act 2010. Detailed guidance to support completion can be found here [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#).

This assessment should be started at the beginning of the process by someone with a good knowledge of the proposal and service area, and sufficient influence over the proposal. It is good practice to take a team approach to completing the equality impact assessment. Please contact the [Equality and Inclusion Team](#) early for advice and feedback.

1.1 What are the aims and objectives/purpose of this proposal?

Briefly explain the purpose of the proposal and why it is needed. Describe who it is aimed at and the intended aims / outcomes. Where known also summarise the key actions you plan to undertake. Please use plain English, avoiding jargon and acronyms. Equality Impact Assessments are viewed by a wide range of people including decision-makers and the wider public.

Budget context

Every year, the council must agree an annual budget which balances the money we spend with the money we are expecting to receive. Councils across the country are continuing to face financial challenges and based on our current forecasts, we face a funding gap over the next five years (to 2028/29) of up to £81.2 million dependent on the severity of factors such as inflation, funding changes, and unavoidable service pressures. This is in addition to the £17.7 million of savings and efficiencies proposals for 2024-2028 outlined in the 2023/24 budget and assumed delivery of 2023/24 savings in the current year.

The Council has defined statutory responsibilities, but deliver against a far broader agenda, providing universal services benefiting the whole community, and targeted services aimed at individuals, communities with particular needs, and businesses – administered by our workforce, city partners, stakeholder organisations and commissioned services.

To address these challenges, we are looking across all of our services with a focus on:

- maximising our transformation programmes – where we are looking to improve services whilst achieving the best value for money
- income opportunities – where we are looking to improve our external income and most effectively apply that income

- targeted reviews – where we are looking at services that are comparatively high in cost compared to other councils to see where we can do things differently to reduce costs, be more efficient in how we do things and, in some cases, stop doing some things entirely.

This proposal

This proposal is a review and realignment of the budgets for fees and charges across sources of income that have repeatedly outperformed their approved budgets in recent years.

This proposal does not change existing fees and charges in these areas, nor does it raise any additional charges, it is solely to recognise income that the council has received in the last years that is in excess of existing budgets. This item will ensure that the budgets are realigned to the correct levels and that as a result the budget gap is reduced by the income the council is already in receipt of to ensure further alternative savings are restricted to just the requirement and not exacerbated by unrecognised incomes.

1.2 Who will the proposal have the potential to affect?

<input type="checkbox"/> Bristol City Council workforce	<input type="checkbox"/> Service users	<input type="checkbox"/> The wider community
<input type="checkbox"/> Commissioned services	<input type="checkbox"/> City partners / Stakeholder organisations	
Additional comments: The proposal is expected to have no changed impact to any stakeholders as it is recognising the existing position only.		

1.3 Will the proposal have an equality impact?

Yes No [please select]

Could the proposal affect access levels of representation or participation in a service, or does it have the potential to change e.g. quality of life: health, education, or standard of living etc.?

If ‘No’ explain why you are sure there will be no equality impact, then skip steps 2-4 and request review by Equality and Inclusion Team.

If ‘Yes’ complete the rest of this assessment, or if you plan to complete the assessment at a later stage please state this clearly here and request review by the Equality and Inclusion Team.

No changes are proposed as a result of this item – this is simply to rebase the budget in recognition of existing fees and charges being achieved.

Step 4: Impact

4.1 How has the equality impact assessment informed or changed the proposal?

What are the main conclusions of this assessment? Use this section to provide an overview of your findings. This summary can be included in decision pathway reports etc.

If you have identified any significant negative impacts which cannot be mitigated, provide a justification showing how the proposal is proportionate, necessary, and appropriate despite this.

Summary of significant negative impacts and how they can be mitigated or justified:
Summary of positive impacts / opportunities to promote the Public Sector Equality Duty:

4.2 Action Plan

Use this section to set out any actions you have identified to improve data, mitigate issues, or maximise opportunities etc. If an action is to meet the needs of a particular protected group please specify this.

Improvement / action required	Responsible Officer	Timescale
All relevant EqlAs will be published on the Council's website https://www.bristol.gov.uk/council-spending-performance/council-budgets and continue to be updated as appropriate.		

4.3 How will the impact of your proposal and actions be measured?

How will you know if you have been successful? Once the activity has been implemented this equality impact assessment should be periodically reviewed to make sure your changes have been effective your approach is still appropriate.

Our Equality and Inclusion Annual Progress Reports show what we have done to achieve the aims of our Equality and Inclusion policy and strategy, and the progress we have made including reporting on all relevant KPIs and workforce diversity [Equalities policy - bristol.gov.uk](https://www.bristol.gov.uk/equalities-policy)

The Equality and Inclusion Team need at least five working days to comment and feedback on your EqlA. EqlAs should only be marked as reviewed when they provide sufficient information for decision-makers on the equalities impact of the proposal. Please seek feedback and review from the [Equality and Inclusion Team](#) before requesting sign off from your Director¹.

Equality and Inclusion Team Review: <i>Reviewed by the Equality and Inclusion Team</i>	Director Sign-Off: Denise Murray
Date: 09/01/2023	09/01/2024

¹ Review by the Equality and Inclusion Team confirms there is sufficient analysis for decision makers to consider the likely equality impacts at this stage. This is not an endorsement or approval of the proposal.

Equality Impact Assessment [version 2.10]



Title: GAP001 Keep more of the administration fee for the community infrastructure levy	
<input checked="" type="checkbox"/> Budget Proposal	<input type="checkbox"/> New <input checked="" type="checkbox"/> Already exists / review <input type="checkbox"/> Changing
Directorate: Growth and Regeneration	Lead Officer name: Simone Wilding
Service Area: Planning	Lead Officer role: Chief Planner and Head of Planning

Step 1: What do we want to do?

The purpose of an Equality Impact Assessment is to assist decision makers in understanding the impact of proposals as part of their duties under the Equality Act 2010. Detailed guidance to support completion can be found here [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#).

This assessment should be started at the beginning of the process by someone with a good knowledge of the proposal and service area, and sufficient influence over the proposal. It is good practice to take a team approach to completing the equality impact assessment. Please contact the [Equality and Inclusion Team](#) early for advice and feedback.

1.1 What are the aims and objectives/purpose of this proposal?

Briefly explain the purpose of the proposal and why it is needed. Describe who it is aimed at and the intended aims / outcomes. Where known also summarise the key actions you plan to undertake. Please use [plain English](#), avoiding jargon and acronyms. Equality Impact Assessments are viewed by a wide range of people including decision-makers and the wider public.

Budget context

Every year, the council must agree an annual budget which balances the money we spend with the money we are expecting to receive. Councils across the country are continuing to face financial challenges and based on our current forecasts, we face a funding gap over the next five years (to 2028/29) of up to £81.2 million dependent on the severity of factors such as inflation, funding changes, and unavoidable service pressures. This is in addition to the £17.7 million of savings and efficiencies proposals for 2024-2028 outlined in the 2023/24 budget and assumed delivery of 2023/24 savings in the current year.

The Council has defined statutory responsibilities, but deliver against a far broader agenda, providing universal services benefiting the whole community, and targeted services aimed at individuals, communities with particular needs, and businesses – administered by our workforce, city partners, stakeholder organisations and commissioned services.

To address these challenges, we are looking across all of our services with a focus on:

- maximising our transformation programmes – where we are looking to improve services whilst achieving the best value for money
- income opportunities – where we are looking to improve our external income and most effectively apply that income
- targeted reviews – where we are looking at services that are comparatively high in cost compared to other councils to see where we can do things differently to reduce costs, be more efficient in how we do things and, in some cases, stop doing some things entirely.

This proposal: Make full use of the administration payment element of the Community Infrastructure Levy

The Community Infrastructure Levy (CIL) is money collected from new developments, which is used to fund local infrastructure. This proposal is to use the full 5% of the Community Infrastructure permissible to be spend on activity associated with the implementation of the Levy. The percentage used previously has fluctuated year to year. This is in line with how the administration payment element of the Community Infrastructure Levy is intended to be used. Namely to fund posts that are directly necessary for the operation of the infrastructure levy. In addition, it will contribute towards systems that are necessary for the day-to-day implementation of the levy. We would use this to replace money from the general fund (the council’s main revenue account) to fund staff time spent supporting CIL work.

1.2 Who will the proposal have the potential to affect?

<input type="checkbox"/> Bristol City Council workforce	<input type="checkbox"/> Service users	<input type="checkbox"/> The wider community
<input type="checkbox"/> Commissioned services	<input type="checkbox"/> City partners / Stakeholder organisations	
Additional comments: The impact is so distributed and diluted that it would be misleading to identify any group as being affected. Particularly as the proposal is to use the money as intended by the CIL legislation.		

1.3 Will the proposal have an equality impact?

Yes No [please select]

Could the proposal affect access levels of representation or participation in a service, or does it have the potential to change e.g. quality of life: health, education, or standard of living etc.?

If ‘No’ explain why you are sure there will be no equality impact, then skip steps 2-4 and request review by Equality and Inclusion Team.

If ‘Yes’ complete the rest of this assessment, or if you plan to complete the assessment at a later stage please state this clearly here and request review by the Equality and Inclusion Team.

The proposal ensures the continued operation of the Community Infrastructure Levy implementation which in turn means that development contributes adequately to community infrastructure provision. As such it is a mechanism for improving provision for the benefit of all in our communities. We have not identified any equality impact from the proposal, which is limited in scope as funding amounts and activities remain the same, funds are just applied from different sources. This will not affect staff or service users.

Step 4: Impact

4.1 How has the equality impact assessment informed or changed the proposal?

What are the main conclusions of this assessment? Use this section to provide an overview of your findings. This summary can be included in decision pathway reports etc.

If you have identified any significant negative impacts which cannot be mitigated, provide a justification showing how the proposal is proportionate, necessary, and appropriate despite this.

Summary of significant negative impacts and how they can be mitigated or justified:
Summary of positive impacts / opportunities to promote the Public Sector Equality Duty:

4.2 Action Plan

Use this section to set out any actions you have identified to improve data, mitigate issues, or maximise opportunities etc. If an action is to meet the needs of a particular protected group please specify this.


Improvement / action required	Responsible Officer	Timescale
All relevant EqlAs will be published on the Council's website https://www.bristol.gov.uk/council-spending-performance/council-budgets and continue to be updated as appropriate.		

4.3 How will the impact of your proposal and actions be measured?

How will you know if you have been successful? Once the activity has been implemented this equality impact assessment should be periodically reviewed to make sure your changes have been effective your approach is still appropriate.

Our Equality and Inclusion Annual Progress Reports show what we have done to achieve the aims of our Equality and Inclusion policy and strategy, and the progress we have made including reporting on all relevant KPIs and workforce diversity Equalities policy - bristol.gov.uk
[add specific measures or KPIs here]

The Equality and Inclusion Team need at least five working days to comment and feedback on your EqlA. EqlAs should only be marked as reviewed when they provide sufficient information for decision-makers on the equalities impact of the proposal. Please seek feedback and review from the [Equality and Inclusion Team](#) before requesting sign off from your Director¹.

Equality and Inclusion Team Review:	Director Sign-Off:
Reviewed by the Equality and Inclusion Team	
Date: 10/01/2024	Date: 10.1.2024

¹ Review by the Equality and Inclusion Team confirms there is sufficient analysis for decision makers to consider the likely equality impacts at this stage. This is not an endorsement or approval of the proposal.



Title: Increased City Transport Recharging	
<input checked="" type="checkbox"/> Budget Proposal	<input checked="" type="checkbox"/> New <input type="checkbox"/> Already exists / review <input type="checkbox"/> Changing
Directorate: G&R, EoP	Lead Officer name: Adam Crowther
Service Area: City Transport	Lead Officer role: Head of City Transport

Step 1: What do we want to do?

The purpose of an Equality Impact Assessment is to assist decision makers in understanding the impact of proposals as part of their duties under the Equality Act 2010. Detailed guidance to support completion can be found here [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#).

This assessment should be started at the beginning of the process by someone with a good knowledge of the proposal and service area, and sufficient influence over the proposal. It is good practice to take a team approach to completing the equality impact assessment. Please contact the [Equality and Inclusion Team](#) early for advice and feedback.

1.1 What are the aims and objectives/purpose of this proposal?

Briefly explain the purpose of the proposal and why it is needed. Describe who it is aimed at and the intended aims / outcomes. Where known also summarise the key actions you plan to undertake. Please use [plain English](#), avoiding jargon and acronyms. Equality Impact Assessments are viewed by a wide range of people including decision-makers and the wider public.

Budget context

Every year, the council must agree an annual budget which balances the money we spend with the money we are expecting to receive. Councils across the country are continuing to face financial challenges and based on our current forecasts, we face a funding gap over the next five years (to 2028/29) of up to £81.2 million dependent on the severity of factors such as inflation, funding changes, and unavoidable service pressures. This is in addition to the £17.7 million of savings and efficiencies proposals for 2024-2028 outlined in the 2023/24 budget and assumed delivery of 2023/24 savings in the current year.

The Council has defined statutory responsibilities, but deliver against a far broader agenda, providing universal services benefiting the whole community, and targeted services aimed at individuals, communities with particular needs, and businesses – administered by our workforce, city partners, stakeholder organisations and commissioned services.

To address these challenges we are looking across all of our services with a focus on:

- maximising our transformation programmes – where we are looking to improve services whilst achieving the best value for money
- income opportunities – where we are looking to improve our external income and most effectively apply that income
- targeted reviews – where we are looking at services that are comparatively high in cost compared to other councils to see where we can do things differently to reduce costs, be more efficient in how we do things and, in some cases, stop doing some things entirely.

This proposal: Increased City Transport Capital Recharging

This proposal is regarding the City Transport Service. Through recruiting to vacant posts, additional capital recharge will be generated from work on capital schemes delivering additional net income. This is as per the standard process and the whole process is audited ensuring due diligence. This is all capital funded work from a variety of sources and in a variety of programme. No new funding is required to enable this additional income, this would replace income from the general fund (the council's main revenue account). We would make sure all charges for work are accurately recorded and job vacancies are filled, it will ensure the efficient use of resources (human and financial) on those things that will deliver the best outcomes. Any recruitment processes will follow the usual HR procedures.

1.2 Who will the proposal have the potential to affect?

<input checked="" type="checkbox"/> Bristol City Council workforce	<input checked="" type="checkbox"/> Service users	<input checked="" type="checkbox"/> The wider community
<input type="checkbox"/> Commissioned services	<input checked="" type="checkbox"/> City partners / Stakeholder organisations	
Additional comments: Impacts mainly through improved and accelerated scheme delivery		

1.3 Will the proposal have an equality impact?

<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	[please select]
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Could the proposal affect access levels of representation or participation in a service, or does it have the potential to change e.g. quality of life: health, education, or standard of living etc.?

If 'No' explain why you are sure there will be no equality impact, then skip steps 2-4 and request review by Equality and Inclusion Team.

If 'Yes' complete the rest of this assessment, or if you plan to complete the assessment at a later stage please state this clearly here and request review by the Equality and Inclusion Team.

The proposed saving is an outcome of resourcing the service properly so that more resource can be applied to projects. The projects are the same, but they will be delivered more effectively and efficiently. We have not identified any equality impact from the proposal at this stage, it is limited in scope as funding amounts and activities remain the same, funds are just applied from different sources. This will not affect staff or service users.

Step 4: Impact

4.1 How has the equality impact assessment informed or changed the proposal?

What are the main conclusions of this assessment? Use this section to provide an overview of your findings. This summary can be included in decision pathway reports etc.

If you have identified any significant negative impacts which cannot be mitigated, provide a justification showing how the proposal is proportionate, necessary, and appropriate despite this.

Summary of significant negative impacts and how they can be mitigated or justified:

Summary of positive impacts / opportunities to promote the Public Sector Equality Duty:

4.2 Action Plan

Use this section to set out any actions you have identified to improve data, mitigate issues, or maximise opportunities etc. If an action is to meet the needs of a particular protected group please specify this.


Improvement / action required	Responsible Officer	Timescale
All relevant EqIAs will be published on the Council's website https://www.bristol.gov.uk/council-spending-performance/council-budgets and continue to be updated as appropriate.		

4.3 How will the impact of your proposal and actions be measured?

How will you know if you have been successful? Once the activity has been implemented this equality impact assessment should be periodically reviewed to make sure your changes have been effective your approach is still appropriate.

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The Equality and Inclusion Team need at least five working days to comment and feedback on your EqIA. EqIAs should only be marked as reviewed when they provide sufficient information for decision-makers on the equalities impact of the proposal. Please seek feedback and review from the [Equality and Inclusion Team](#) before requesting sign off from your Director¹.

Equality and Inclusion Team Review: <i>Reviewed by the Equality and Inclusion Team</i>	Director Sign-Off: 
Date: 10/01/2024	10.1.2024

¹ Review by the Equality and Inclusion Team confirms there is sufficient analysis for decision makers to consider the likely equality impacts at this stage. This is not an endorsement or approval of the proposal.

Equality Impact Assessment [version 2.10]



Title: Use e-scooter payments for Highway Maintenance	
<input checked="" type="checkbox"/> Budget Proposal	<input type="checkbox"/> New <input checked="" type="checkbox"/> Already exists / review <input type="checkbox"/> Changing
Directorate: Growth and Regeneration	Lead Officer name: Shaun Taylor
Service Area: Highways and Traffic	Lead Officer role: Head of Highways

Step 1: What do we want to do?

The purpose of an Equality Impact Assessment is to assist decision makers in understanding the impact of proposals as part of their duties under the Equality Act 2010. Detailed guidance to support completion can be found here [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#).

This assessment should be started at the beginning of the process by someone with a good knowledge of the proposal and service area, and sufficient influence over the proposal. It is good practice to take a team approach to completing the equality impact assessment. Please contact the [Equality and Inclusion Team](#) early for advice and feedback.

1.1 What are the aims and objectives/purpose of this proposal?

Briefly explain the purpose of the proposal and why it is needed. Describe who it is aimed at and the intended aims / outcomes. Where known also summarise the key actions you plan to undertake. Please use [plain English](#), avoiding jargon and acronyms. Equality Impact Assessments are viewed by a wide range of people including decision-makers and the wider public.

Budget context

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This proposal

The purpose of the proposal is to use income from the electric scooter scheme to assist in the repair of the highway assets such as roads and pavements. This will ensure that the existing arrangements to maintain the highway assets are consistent and should have a positive equalities impact through more consistently maintained assets. This proposal does not contain any new activities.

This new income could also be used to support the use of bikes and e-scooters in the city. If so, each activity will be subject to its own equalities impact assessment which will ensure protocol is followed around the safe storage of e-scooters and bikes to mitigate against any accessibility issues.

1.2 Who will the proposal have the potential to affect?

<input type="checkbox"/> Bristol City Council workforce	<input checked="" type="checkbox"/> Service users	<input checked="" type="checkbox"/> The wider community
<input type="checkbox"/> Commissioned services	<input checked="" type="checkbox"/> City partners / Stakeholder organisations	
Additional comments:		

1.3 Will the proposal have an equality impact?

<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	[please select]
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Could the proposal affect access levels of representation or participation in a service, or does it have the potential to change e.g. quality of life: health, education, or standard of living etc.?

If 'No' explain why you are sure there will be no equality impact, then skip steps 2-4 and request review by Equality and Inclusion Team.

If 'Yes' complete the rest of this assessment, or if you plan to complete the assessment at a later stage please state this clearly here and request review by the Equality and Inclusion Team.

We have not identified any equality impact from the proposal, which is limited in scope as funding amounts and activities remain the same. This will not affect staff or service users.

Step 4: Impact

4.1 How has the equality impact assessment informed or changed the proposal?

What are the main conclusions of this assessment? Use this section to provide an overview of your findings. This summary can be included in decision pathway reports etc.

If you have identified any significant negative impacts which cannot be mitigated, provide a justification showing how the proposal is proportionate, necessary, and appropriate despite this.

Summary of significant negative impacts and how they can be mitigated or justified:
Summary of positive impacts / opportunities to promote the Public Sector Equality Duty:

4.2 Action Plan

Use this section to set out any actions you have identified to improve data, mitigate issues, or maximise opportunities etc. If an action is to meet the needs of a particular protected group please specify this.


Improvement / action required	Responsible Officer	Timescale
All relevant EqlAs will be published on the Council's website https://www.bristol.gov.uk/council-spending-performance/council-budgets and continue to be updated as appropriate.		

4.3 How will the impact of your proposal and actions be measured?

How will you know if you have been successful? Once the activity has been implemented this equality impact assessment should be periodically reviewed to make sure your changes have been effective your approach is still appropriate.

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<p>Equality and Inclusion Team Review:</p> <p>The Equality and Inclusion Team</p>	<p>Director sign off</p> 
<p>Date: 15/12/2023</p>	<p>January 3rd 2024</p>

¹ Review by the Equality and Inclusion Team confirms there is sufficient analysis for decision makers to consider the likely equality impacts at this stage. This is not an endorsement or approval of the proposal.

Equality Impact Assessment [version 2.10]



Title: GAP004 Legible City	
<input checked="" type="checkbox"/> Budget Proposal	<input type="checkbox"/> New <input checked="" type="checkbox"/> Already exists / review <input type="checkbox"/> Changing
Directorate: Growth & Regeneration	Lead Officer name: Anesa Kritah/Jason Thorne
Service Area: Economy of Place	Lead Officer role: Head of Economic Development / Service Manager City Centre and High Streets

Step 1: What do we want to do?

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1.1 What are the aims and objectives/purpose of this proposal?

Briefly explain the purpose of the proposal and why it is needed. Describe who it is aimed at and the intended aims / outcomes. Where known also summarise the key actions you plan to undertake. Please use plain English, avoiding jargon and acronyms. Equality Impact Assessments are viewed by a wide range of people including decision-makers and the wider public.

Budget context

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This proposal - Bristol Legible City Maintenance and Update Budget.

Preamble:

- The Bristol Legible City project was developed in the late 1990s to improve people’s understanding and experience of the city through the use of identity, information and transportation projects.
- The project was the first of its kind with Bristol pioneering a system that has since been replicated both nationally and internationally.
- Through the use of both mapping monoliths, finger post signs and printed walking maps visitors to the city have been able to navigate and explore with ease.
- Over the past 30 plus years since the first map monolith was installed Bristol has grown and developed. This means that the Legible City project must evolve to reflect those changes to remain relevant.

The proposal is for the Legible City project to spend £60,000 less in 2024/25. This means that there will be less budget for signage and wayfinding information that help people navigate the city, signs will be updated and maintained less frequently and may not always have the latest information about new developments or transport.

1.2 Who will the proposal have the potential to affect?

<input type="checkbox"/> Bristol City Council workforce	<input checked="" type="checkbox"/> Service users	<input checked="" type="checkbox"/> The wider community
<input checked="" type="checkbox"/> Commissioned services	<input checked="" type="checkbox"/> City partners / Stakeholder organisations	
Additional comments:		

1.3 Will the proposal have an equality impact?

Yes **No** [please select]

Could the proposal affect access levels of representation or participation in a service, or does it have the potential to change e.g. quality of life: health, education, or standard of living etc.?

If ‘No’ explain why you are sure there will be no equality impact, then skip steps 2-4 and request review by Equality and Inclusion Team.

If ‘Yes’ complete the rest of this assessment, or if you plan to complete the assessment at a later stage please state this clearly here and request review by the Equality and Inclusion Team.

Any reduction in project spend will reduce some of the maintenance, updating of existing signs and creation of new signs. This will leave some out-of-date information on the signs that show facilities no longer open to the public. New amenities need to be included on updated signs in order for the public to access these including accessible routes and facilities.

Step 2: What information do we have?

2.1 What data or evidence is there which tells us who is, or could be affected?

Please use this section to demonstrate an understanding of who could be affected by the proposal. Include general population data where appropriate, and information about people who will be affected with particular reference to protected and other relevant characteristics: [How we measure equality and diversity \(bristol.gov.uk\)](https://www.bristol.gov.uk/how-we-measure-equality-and-diversity)

Use one row for each evidence source and say which characteristic(s) it relates to. You can include a mix of qualitative and quantitative data e.g. from national or local research, available data or previous consultations and engagement activities.

Outline whether there is any over or under representation of equality groups within relevant services - don't forget to benchmark to the local population where appropriate. Links to available data and reports are here [Data, statistics and intelligence \(sharepoint.com\)](https://www.sharepoint.com/Data-statistics-and-intelligence). See also: [Bristol Open Data \(Quality of Life, Census etc.\)](#); [Joint Strategic Needs Assessment \(JSNA\)](#); [Ward Statistical Profiles](#).

For workforce / management of change proposals you will need to look at the diversity of the affected teams using available evidence such as [HR Analytics: Power BI Reports \(sharepoint.com\)](https://www.sharepoint.com/HR-Analytics-Power-BI-Reports) which shows the diversity profile of council teams and service areas. Identify any over or under-representation compared with Bristol economically active citizens for different characteristics. Additional sources of useful workforce evidence include the [Employee Staff Survey Report](#) and [Stress Risk Assessment Form](#)

Data / Evidence Source [Include a reference where known]	Summary of what this tells us
Census 2021	The Census details the demographic profile of Bristol.
The population of Bristol	Updated annually. The report brings together statistics on the current estimated population of Bristol, recent trends in population, future projections and looks at the key characteristics of the people living in Bristol.
Bristol Key Facts 2022	Population Profiles for Equalities Groups bring together detailed analysis looking at equalities groups and how they differ in relation to age, health, employment, education and housing, and maps the distribution of equalities groups across the city.
Ward profile data (bristol.gov.uk)	The Ward Profiles provide a range of data-sets, including population, life expectancy, health and education disparities etc. for each of Bristol's electoral wards.

Bristol Quality of Life Survey
2021-22

The Quality of Life (QoL) survey is an annual randomised sample survey of the Bristol population, mailed to 33,000 households (with online & paper options), and some additional targeting to boost numbers from low responding groups. In brief, the most recent QoL survey indicated that inequality and deprivation continue to affect people’s experience in almost every element measured by the survey.

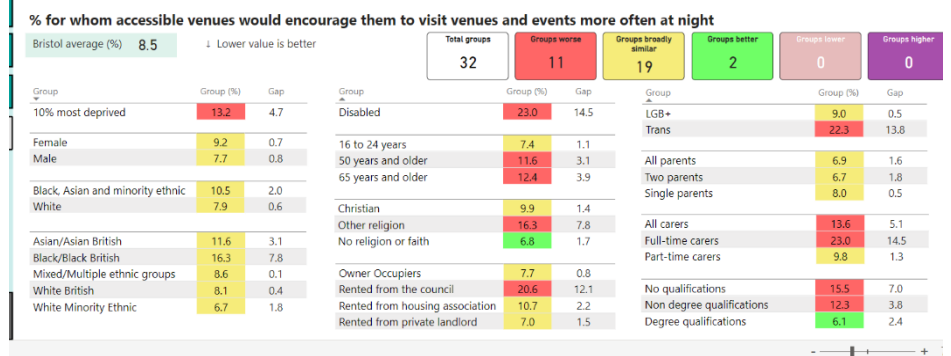
The Quality of Life 2021/22 data dashboard highlights those indicators, wards and equality and demographic groups which are better or worse than the Bristol average.

Quality of Life Indicator	% who find it difficult to manage financially
16 to 24 years	12.5
50 years and older	6.7
65 years and older	3.2
Female	8.6
Male	8.5
Disabled	21.6
Asian /Asian British	9.9
Black/Black British	19.8
Mixed/Multiple Ethnicity	16.3
White British	7.8
White Minority Ethnic	8.4
Lesbian Gay or Bisexual	12.7
No Religion or Faith	8.0
Christian Religion	8.3
Other Religions	18.2
Carer	10.7
Full Time Carer	14.0
Part Time Carer	9.7
Single Parent	28.6
Two Parent	9.6
Parent (all)	12.0
No Qualifications	10.0
Non-Degree Qualified	12.9
Degree Qualified	6.7
Rented (Council)	20.3
Rented (HA)	20.6
Rented (Private)	14.6
Owner Occupier	4.6

Most Deprived 10%	18.8
Bristol Average	8.7

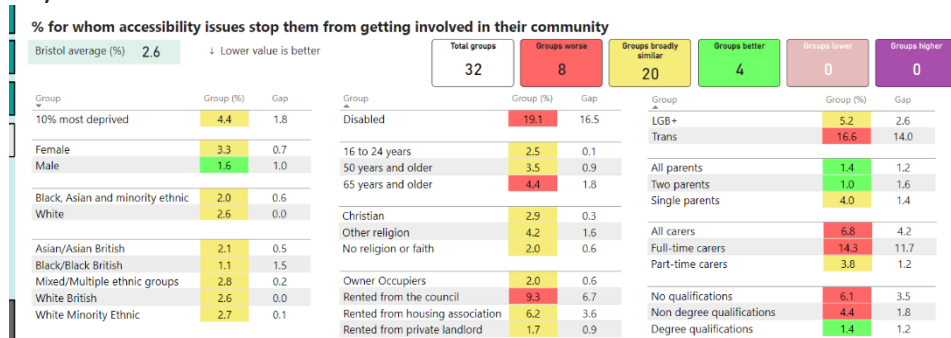
% for whom accessible venues would encourage them to visit venues and events more often at night.

The data shows that there are higher than average concerns surrounding accessible venues allowing people to visit venues and events more often at night from Disabled people, Carers, Older People, Transgender people, people without formal qualifications, people that rent from the council and people that live in the 10% most deprived areas. So, based on this data we can assume that this proposal may have a disproportionate impact on these groups that already are presented with barriers due to inaccessibility in Bristol. Any decrease in the accessibility of the signage would also = a decrease in accessibility in general. Any reduction in funding would prevent the addition of accessible information which is missing on the signs at present. and accessible information and signate would be a big contributor to some for being able to access the city.



% for whom accessibility issues stop them from getting involved in their community

The data shows that there are higher than average concerns surrounding accessibility issues stop them from getting involved in their community from Disabled people, Carers, Older People, Transgender people, people without formal qualifications, people that rent from the council and so, based on this data we can assume that this proposal may have a disproportionate impact on these groups that already are presented with barriers due to inaccessibility in Bristol. Any decrease in the accessibility of the signage would also = a decrease in accessibility in general. Any reduction in funding would prevent the addition of accessible information which is missing on the signs at present. and accessible information and signate would be a big contributor to some for being able to access the city.



2.2 Do you currently monitor relevant activity by the following protected characteristics?

<input type="checkbox"/> Age	<input type="checkbox"/> Disability	<input type="checkbox"/> Gender Reassignment
<input type="checkbox"/> Marriage and Civil Partnership	<input type="checkbox"/> Pregnancy/Maternity	<input type="checkbox"/> Race
<input type="checkbox"/> Religion or Belief	<input type="checkbox"/> Sex	<input type="checkbox"/> Sexual Orientation

2.3 Are there any gaps in the evidence base?

Where there are gaps in the evidence, or you don't have enough information about some equality groups, include an equality action to find out in section 4.2 below. This doesn't mean that you can't complete the assessment without the information, but you need to follow up the action and if necessary, review the assessment later. If you are unable to fill in the gaps, then state this clearly with a justification.

For workforce related proposals all relevant characteristics may not be included in HR diversity reporting (e.g. pregnancy/maternity). For smaller teams diversity data may be redacted. A high proportion of not known/not disclosed may require an action to address under-reporting.

Although our corporate approach is to collect diversity monitoring for all relevant characteristics, there are gaps in the available local diversity data for some characteristics, especially where this has not always historically been included in census and statutory reporting e.g. for sexual orientation.

We also know there are some under-reporting gaps in our workforce diversity information - where personal and confidential information is voluntarily requested from staff.

We have no diversity monitoring information for legible city as a project.

2.4 How have you involved communities and groups that could be affected?

You will nearly always need to involve and consult with internal and external stakeholders during your assessment. The extent of the engagement will depend on the nature of the proposal or change. This should usually include individuals and groups representing different relevant protected characteristics. Please include details of any completed engagement and consultation and how representative this had been of Bristol's diverse communities.

Include the main findings of any engagement and consultation in Section 2.1 above.

If you are managing a workforce change process or restructure please refer to [Managing change or restructure \(sharepoint.com\)](https://sharepoint.com) for advice on consulting with employees etc. Relevant stakeholders for engagement about workforce changes may include e.g. staff-led groups and trades unions as well as affected staff.

We launched a public consultation on our budget proposals between 09th November 2023 to the 21st December 2023. This consultation set out all the savings proposals we had identified to produce a balanced budget in the context of reduced available funding and increasing financial pressures.

2.5 How will engagement with stakeholders continue?

Explain how you will continue to engage with stakeholders throughout the course of planning and delivery. Please describe where more engagement and consultation is required and set out how you intend to undertake it. Include any targeted work to seek the views of under-represented groups. If you do not intend to undertake it, please set out your justification. You can ask the Equality and Inclusion Team for help in targeting particular groups.

All responses to the Budget Consultation will be analysed and included in the Council's Budget report that will be published on the Bristol City Council website in early 2024. We will take Budget consultation responses into account when developing this and other final proposals to put to the Cabinet and a meeting of the Full Council for approval. The final decision will be taken by Full Council at its budget setting meeting in February / March 2024.

Following the setting of the overall budget envelope there will be extensive engagement, consultation and co-design with affected communities on particular proposals which will inform future decision making prior to implementation. Our approach to public engagement and consultation will proactively

target under-represented respondents to increase the participation of people from equality groups and their local representative organisations. This will help to ensure that our services and actions are informed by the views and needs of all our citizens.

We will develop a future strategy for Legible City working with various internal and external stakeholders including Transport, community groups, equalities groups, Visit West, Business Improvement Districts, Shopping Centre Managers.

Step 3: Who might the proposal impact?

Analysis of impacts must be rigorous. Please demonstrate your analysis of any impacts of the proposal in this section, referring to evidence you have gathered above, and the characteristics protected by the Equality Act 2010. Also include details of existing issues for particular groups that you are aware of and are seeking to address or mitigate through this proposal. See detailed guidance documents for advice on identifying potential impacts etc. [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#)

3.1 Does the proposal have any potentially adverse impacts on people based on their protected or other relevant characteristics?

Consider sub-categories (different kinds of disability, ethnic background etc.) and how people with combined characteristics (e.g. young women) might have particular needs or experience particular kinds of disadvantage.

Where mitigations indicate a follow-on action, include this in the 'Action Plan' Section 4.2 below.

GENERAL COMMENTS (highlight any potential issues that might impact all or many groups)	
Even when we plan to consult in more detail on specific service delivery proposals at a later time, we must ensure that any budget setting decisions that are likely to affect future services are informed by sufficient consultation and proper analysis. This is so that decision makers can have due regard to any likely disproportionate or negative impact on the basis of their protected and other relevant characteristics at the time the budget is approved – not afterwards ¹ .	
Decision makers will have the ability to make changes to the individual spending plans following further consultation as appropriate and detailed evaluation of the impact of specific proposals. Within the proposed budget envelope there will be financial mitigation put aside for any non-delivery or amendments to proposals which may occur due to future consideration of equalities issues or other factors.	
As well as identifying whether budget changes will have a disproportionate impact on particular groups (e.g., because they are over-represented in a particular cohort), we need to pay particular attention to the risk of indirect discrimination: when an apparently neutral decision puts members of a given group at a particular disadvantage compared with other people because of their different needs and circumstances.	
We are also aware of existing structural inequalities and particular considerations, issues, and disparities for people in Bristol based on their characteristics, which we will take into account.	
PROTECTED CHARACTERISTICS	
Age: Young People	Does your analysis indicate a disproportionate impact? Yes No <input checked="" type="checkbox"/>
Potential impacts:	•
Mitigations:	
Age: Older People	Does your analysis indicate a disproportionate impact? Yes No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • Older people in Bristol are: <ul style="list-style-type: none"> ○ less likely to be competent using digital services

	<ul style="list-style-type: none"> ○ more reliant on public and community transport ○ more likely to be an unpaid carer ○ more likely to help out or volunteer in their community ○ less likely to have formal qualifications <ul style="list-style-type: none"> ● Bristol Ageing Better estimated at least 11,000 older people are experiencing isolation in the city. ● We must factor aging and the needs of older people into long term budgeting and service design ● Older people are more reliant on the non digital forms of wayfinding. Monoliths and fingerposts. These are the items that would be effected by any budget cuts to the service.
Mitigations:	<p>By using the reading distance guidelines as set out in the Legible City Design Guide both the text and pictograms can be set at a size which is easily read by most users.</p> <p>For example, finger post text set at 65mm tall can be read by a person with average eyesight at a distance of up to 15 metres away.</p> <p>Keeping a high contrast of background to text also ensures legibility is maintained even in low light conditions.</p> <p>During 2024 there will be an upgrade of 32 of the map monoliths to include updated map artwork and new internally illuminated panels. This will greatly increase visibility of the signs during low and nighttime light levels.</p>
Disability	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> ● 17% of Bristol's population are disabled. There are more disabled women than men living in Bristol. ● Disabled people are less likely to be employed in a managerial or professional occupation ● the national disability employment rate was 52.7% in Q2 2021, compared to 81.0% for non-disabled people. ● Disability increases with age: 4.1% of all children, for the working age population it increases to 12.3% and for people aged 65 and over it increases to 55.9%. ● Disabled people on average have lower qualification levels than the population as a whole. ● Disabled people have lower car ownership levels ● Disabled people should be empowered to make independent living choices and have a say in access to service provision. ● Budget setting needs to provide sufficient resource and flexibility to meet our legal duty to make anticipatory and responsive reasonable adjustments for disabled people including: <ul style="list-style-type: none"> ○ changing the way things are done e.g. opening / working times; ○ changes to overcome barriers created by the physical features of premises. ○ providing auxiliary aids e.g. extra equipment or a different or additional service. ○ is 'anticipatory' so we must think in advance and ongoing about what disabled people might reasonably need. ● Disabled people must not be charged for their reasonable adjustments, accessible formats or other adaptations. It is a legal requirement under the Equalities Act to ensure information is accessible to disabled employees and service users. ● Disabled people need to understand their routes around the city are accessible and know where facilities are
Mitigations:	To aid navigation of the city centre by those with mobility challenges the addition of new accessible routes on existing signage plus new pictograms indicating facilities such as accessible toilets/baby changing facilities is urgently needed. These are also planned to be included on the mapping monolith upgrade program which is planned to roll out this year. Alignment of the finger posts and mapping monoliths is essential in order for the whole system of signage to work.
Sex	Does your analysis indicate a disproportionate impact? Yes No X
Potential impacts:	<ul style="list-style-type: none"> ●
Mitigations:	
Sexual orientation	Does your analysis indicate a disproportionate impact? Yes No X

Potential impacts:	•
Mitigations:	
Pregnancy / Maternity	Does your analysis indicate a disproportionate impact? Yes No X
Potential impacts:	•
Mitigations:	
Gender reassignment	Does your analysis indicate a disproportionate impact? Yes No X
Potential impacts:	•
Mitigations:	
Race	Does your analysis indicate a disproportionate impact? Yes X No
Potential impacts:	<ul style="list-style-type: none"> • Ethnic minorities in Bristol experience greater disadvantage than in England and Wales as a whole in education and employment and this is particularly so for Black African people². • In the last census (2011) 16% of the population belonged to a Black, Asian or minority ethnic group and this is likely to be higher now. • The top three countries of birth outside UK for Bristol residents are Poland, Somalia and India. • Bangladeshi, Pakistani, and Black ethnic groups are more likely to live in deprived neighbourhoods; and the same groups and Chinese ethnicities are about twice as likely to live on a low income and experience child poverty compared to White groups • Black people in the UK are less likely to hold a driving licence and more likely to rely on public transport. • Black, Asian and minority ethnic groups in Bristol are more likely to find inaccessible public transport prevents them from leaving their home when they want to • Black African young people are disadvantaged in education compared to their White peers⁸. A disproportionately high percentage of Bristol school pupils from Black, Asian and minority ethnic backgrounds are excluded from school and In Bristol pupils with the lowest 'Attainment 8' scores are from Black ethnic background (highest from Chinese ethnic background.) • Organisations may lack cultural competence because minoritised ethnic staff are under- represented. • People from Black African, Other, and Black Caribbean groups have persistently high levels of unemployment and almost all ethnic minority groups in Bristol experience employment inequality when compared to White British people. • Black Asian and other minoritised ethnic groups are more likely to be self-employed than the Bristol average and over-represented in low income self-employment including taxis, takeaway restaurants • People who do not speak English as a main language may require information in plain English and community language translations or videos etc. • People who cannot read English may be more reliant on visible symbols to direct them or show them facilities. The publicly available printed map currently displays updated locations of facilities with pictograms which the existing street signage does not.
Mitigations:	See general comments above Inclusion of new pictograms to the existing finger post signs will aid users for whom English is not their first language to navigate and locate facilities across the city centre. Currently many of these are missing due to the out of date nature of many of the finger post signs. Mapping monoliths will also have these additional pictograms added during the upgrade programme.
Religion or Belief	Does your analysis indicate a disproportionate impact? Yes No X
Potential impacts:	• .
Mitigations:	

Marriage & civil partnership	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	
Mitigations:	
OTHER RELEVANT CHARACTERISTICS	
Socio-Economic (deprivation)	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	•
Mitigations:	
Carers	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	•
Mitigations:	
Other groups [Please add additional rows below to detail the impact for other relevant groups as appropriate e.g. Asylums and Refugees; Looked after Children / Care Leavers; Homelessness]	
Potential impacts:	
Mitigations:	

3.2 Does the proposal create any benefits for people based on their protected or other relevant characteristics?

Outline any potential benefits of the proposal and how they can be maximised. Identify how the proposal will support our [Public Sector Equality Duty](#) to:

- ✓ Eliminate unlawful discrimination for a protected group
- ✓ Advance equality of opportunity between people who share a protected characteristic and those who don't
- ✓ Foster good relations between people who share a protected characteristic and those who don't

The scale of the potential gap in our core funding means that there is very limited opportunity to bring genuine additional benefit to equalities groups in the circumstances. However we have considered as far as possible the need to: eliminate discrimination, harassment, victimisation and any other conduct prohibited under the Equality Act 2010; advance equality of opportunity between people from different groups; and foster good relations between people from different groups.

Our budget savings proposals are aligned to our Corporate Strategy and although we have limited resources our future focus will be on achieving those priorities we have identified including tackling poverty and intergenerational inequality.

Step 4: Impact

4.1 How has the equality impact assessment informed or changed the proposal?

What are the main conclusions of this assessment? Use this section to provide an overview of your findings. This summary can be included in decision pathway reports etc.

If you have identified any significant negative impacts which cannot be mitigated, provide a justification showing how the proposal is proportionate, necessary, and appropriate despite this.

Summary of significant negative impacts and how they can be mitigated or justified:

Not updating the Legible City signs could have negative impacts, particularly on Disabled people and people who do not read English well. We will consider other sources of funding in order to maintain and update Legible City signage.

Summary of positive impacts / opportunities to promote the Public Sector Equality Duty:

4.2 Action Plan

Use this section to set out any actions you have identified to improve data, mitigate issues, or maximise opportunities etc. If an action is to meet the needs of a particular protected group please specify this.


Improvement / action required	Responsible Officer	Timescale
All relevant EqlAs will be published on the Council’s website https://www.bristol.gov.uk/council-spending-performance/council-budgets and continue to be updated as appropriate.		

4.3 How will the impact of your proposal and actions be measured?

How will you know if you have been successful? Once the activity has been implemented this equality impact assessment should be periodically reviewed to make sure your changes have been effective your approach is still appropriate.

Our Equality and Inclusion Annual Progress Reports show what we have done to achieve the aims of our Equality and Inclusion policy and strategy, and the progress we have made including reporting on all relevant KPIs and workforce diversity [Equalities policy - bristol.gov.uk](https://www.bristol.gov.uk/equalities-policy)

The Equality and Inclusion Team need at least five working days to comment and feedback on your EqlA. EqlAs should only be marked as reviewed when they provide sufficient information for decision-makers on the equalities impact of the proposal. Please seek feedback and review from the [Equality and Inclusion Team](#) before requesting sign off from your Director¹.

<p>Equality and Inclusion Team Review: <i>Reviewed by Equality and Inclusion Team</i></p>	<p>Director Sign-Off: </p>
Date: 8/1/2024	11/01/2024

¹ Review by the Equality and Inclusion Team confirms there is sufficient analysis for decision makers to consider the likely equality impacts at this stage. This is not an endorsement or approval of the proposal.

Equality Impact Assessment [version 2.10]



Title: GAP005: Housing Revenue Account contribution to Head of Housing Delivery cost	
<input checked="" type="checkbox"/> Budget Proposal	<input checked="" type="checkbox"/> New <input type="checkbox"/> Already exists / review <input type="checkbox"/> Changing
Directorate: Housing and Landlord Services	Lead Officer name: Louise Davidson
Service Area: Housing Delivery	Lead Officer role: Head of Housing Delivery

Step 1: What do we want to do?

The purpose of an Equality Impact Assessment is to assist decision makers in understanding the impact of proposals as part of their duties under the Equality Act 2010. Detailed guidance to support completion can be found here [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#).

This assessment should be started at the beginning of the process by someone with a good knowledge of the proposal and service area, and sufficient influence over the proposal. It is good practice to take a team approach to completing the equality impact assessment. Please contact the [Equality and Inclusion Team](#) early for advice and feedback.

1.1 What are the aims and objectives/purpose of this proposal?

Briefly explain the purpose of the proposal and why it is needed. Describe who it is aimed at and the intended aims / outcomes. Where known also summarise the key actions you plan to undertake. Please use **plain English**, avoiding jargon and acronyms. Equality Impact Assessments are viewed by a wide range of people including decision-makers and the wider public.

Budget context

Every year, the council must agree an annual budget which balances the money we spend with the money we are expecting to receive. Councils across the country are continuing to face financial challenges and based on our current forecasts, we face a funding gap over the next five years (to 2028/29) of up to £81.2 million dependent on the severity of factors such as inflation, funding changes, and unavoidable service pressures. This is in addition to the £17.7 million of savings and efficiencies proposals for 2024-2028 outlined in the 2023/24 budget and assumed delivery of 2023/24 savings in the current year.

The Council has defined statutory responsibilities, but deliver against a far broader agenda, providing universal services benefiting the whole community, and targeted services aimed at individuals, communities with particular needs, and businesses – administered by our workforce, city partners, stakeholder organisations and commissioned services.

To address these challenges we are looking across all of our services with a focus on:

- maximising our transformation programmes – where we are looking to improve services whilst achieving the best value for money
- income opportunities – where we are looking to improve our external income and most effectively apply that income

- targeted reviews – where we are looking at services that are comparatively high in cost compared to other councils to see where we can do things differently to reduce costs, be more efficient in how we do things and, in some cases, stop doing some things entirely.

This proposal

This proposal compromises funding the ‘Head of service’ post in the Housing Delivery service differently. The Head of Housing Delivery is currently funded by the general fund (the council’s main revenue account). We would fund 50% of this position through the Housing Revenue Account (HRA). The HRA is funded by tenants’ rents and leasehold service charges, and funds can only be used for services to tenants and leaseholders and the delivery of new homes. Given that the Head of Housing Delivery will oversee the planned increase in housing delivery it is appropriate that this role be part funded by the HRA.

It makes no changes to the outcomes for the service area, but reflects that the Head of Service post manages the Housing Revenue Account (HRA) development team and programme. Therefore, a proportion of the posts costs should be met through the Capital programme budget for new council housing delivery.

1.2 Who will the proposal have the potential to affect?

<input type="checkbox"/> Bristol City Council workforce	<input type="checkbox"/> Service users	<input type="checkbox"/> The wider community
<input type="checkbox"/> Commissioned services	<input type="checkbox"/> City partners / Stakeholder organisations	
Additional comments: there are no direct impacts of this funding change		

1.3 Will the proposal have an equality impact?

Yes No [please select]

Could the proposal affect access levels of representation or participation in a service, or does it have the potential to change e.g. quality of life: health, education, or standard of living etc.?

If ‘No’ explain why you are sure there will be no equality impact, then skip steps 2-4 and request review by Equality and Inclusion Team.

If ‘Yes’ complete the rest of this assessment, or if you plan to complete the assessment at a later stage please state this clearly here and request review by the Equality and Inclusion Team.

This will not affect or change service delivery and the outcomes of the Council Housing Development programme. We have not identified any equality impact from the proposal which is limited in scope as funding amounts and activities remain the same, funds are applied from different sources. This will not affect staff or service-users.

Step 4: Impact

4.1 How has the equality impact assessment informed or changed the proposal?

What are the main conclusions of this assessment? Use this section to provide an overview of your findings. This summary can be included in decision pathway reports etc.

If you have identified any significant negative impacts which cannot be mitigated, provide a justification showing how the proposal is proportionate, necessary, and appropriate despite this.

Summary of significant negative impacts and how they can be mitigated or justified:
n/a
Summary of positive impacts / opportunities to promote the Public Sector Equality Duty:
n/a

4.2 Action Plan

Use this section to set out any actions you have identified to improve data, mitigate issues, or maximise opportunities etc. If an action is to meet the needs of a particular protected group please specify this.

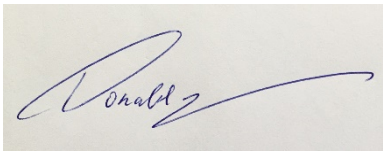
Improvement / action required	Responsible Officer	Timescale
All relevant EqlAs will be published on the Council's website https://www.bristol.gov.uk/council-spending-performance/council-budgets and continue to be updated as appropriate.		

4.3 How will the impact of your proposal and actions be measured?

How will you know if you have been successful? Once the activity has been implemented this equality impact assessment should be periodically reviewed to make sure your changes have been effective your approach is still appropriate.

Our Equality and Inclusion Annual Progress Reports show what we have done to achieve the aims of our Equality and Inclusion policy and strategy, and the progress we have made including reporting on all relevant KPIs and workforce diversity [Equalities policy - bristol.gov.uk](https://www.bristol.gov.uk/equalities-policy)

The Equality and Inclusion Team need at least five working days to comment and feedback on your EqlA. EqlAs should only be marked as reviewed when they provide sufficient information for decision-makers on the equalities impact of the proposal. Please seek feedback and review from the [Equality and Inclusion Team](#) before requesting sign off from your Director¹.

Equality and Inclusion Team Review:	Director Sign-Off: Director Housing and Landlord Services
The Equality and Inclusion Team	
Date: 13/12/2023	14/12/2023

¹ Review by the Equality and Inclusion Team confirms there is sufficient analysis for decision makers to consider the likely equality impacts at this stage. This is not an endorsement or approval of the proposal.

Equality Impact Assessment [version 2.10]



Title: GAP006 GR HLS: Overhead contribution from a proposed new property licensing scheme	
<input checked="" type="checkbox"/> Budget Proposal	<input type="checkbox"/> New <input type="checkbox"/> Already exists / review <input type="checkbox"/> Changing
Directorate: Growth and Regeneration	Lead Officer name: Tom Gilchrist
Service Area: Private Housing	Lead Officer role: Service Manager

Step 1: What do we want to do?

The purpose of an Equality Impact Assessment is to assist decision makers in understanding the impact of proposals as part of their duties under the Equality Act 2010. Detailed guidance to support completion can be found here [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#).

This assessment should be started at the beginning of the process by someone with a good knowledge of the proposal and service area, and sufficient influence over the proposal. It is good practice to take a team approach to completing the equality impact assessment. Please contact the [Equality and Inclusion Team](#) early for advice and feedback.

1.1 What are the aims and objectives/purpose of this proposal?

Briefly explain the purpose of the proposal and why it is needed. Describe who it is aimed at and the intended aims / outcomes. Where known also summarise the key actions you plan to undertake. Please use [plain English](#), avoiding jargon and acronyms. Equality Impact Assessments are viewed by a wide range of people including decision-makers and the wider public.

Budget context

Every year, the council must agree an annual budget which balances the money we spend with the money we are expecting to receive. Councils across the country are continuing to face financial challenges and based on our current forecasts, we face a funding gap over the next five years (to 2028/29) of up to £81.2 million dependent on the severity of factors such as inflation, funding changes, and unavoidable service pressures. This is in addition to the £17.7 million of savings and efficiencies proposals for 2024-2028 outlined in the 2023/24 budget and assumed delivery of 2023/24 savings in the current year.

The Council has defined statutory responsibilities, but deliver against a far broader agenda, providing universal services benefiting the whole community, and targeted services aimed at individuals, communities with particular needs, and businesses – administered by our workforce, city partners, stakeholder organisations and commissioned services.

To address these challenges, we are looking across all of our services with a focus on:

- maximising our transformation programmes – where we are looking to improve services whilst achieving the best value for money
- income opportunities – where we are looking to improve our external income and most effectively apply that income
- targeted reviews – where we are looking at services that are comparatively high in cost compared to other councils to see where we can do things differently to reduce costs, be more efficient in how we do things and, in some cases, stop doing some things entirely.

This proposal

The City Council has just finished a consultation on two proposals on whether to introduce new property licensing schemes that will affect the private rented sector in the city. The proposals will be considered by Cabinet in February 2024.

If one or both proposals are agreed to proceed by Cabinet, some of the income generated from any new property licensing scheme(s) can be used to pay operational 'on costs' provided to enable the Licensing service to enable it to work. 'On Costs' relate to organisational costs such as human resources, Finance and ICT.

The two proposals included in the consultation were:

- Introduce a citywide additional licensing scheme covering all houses in multiple occupation in the city;
- Introducing Selective licensing for private rented family homes in three wards: Ashley Down and Bishopston, Cotham and Easton.

The aims of the property licensing will be to improve the management and condition of houses in multiple occupation across the city and improve poor property conditions in the three selective licensing wards.

If Cabinet agrees to proceed with one or both of these proposals, private landlords will be charged a fee to license their properties. The license fee will pay for the administration of the licensing programme and to undertake property inspections and property improvements during the five-year life of the licensing programme. If one or both proposals are implemented the licensing income will pay for the entire costs for delivering the licensing program.

The aim of licensing is to improve property conditions and poor management practises in the private rented sector. The positive impact of licensing schemes are the numbers of improvements made to properties that are below minimum standard. The negative impact is that for the landlord there is a financial cost and for some tenants, landlords will increase rents to cover these additional costs of relevant scheme even though for the majority the costs are low – maximum £7.15 (additional scheme) or £3.50 per week (selective scheme), before discounts.

There are risks that landlords may leave the rental market rather than pay the fees but the rental income they can receive far outweighs this one-off cost of selective and additional licensing. Analysis from earlier schemes has shown that although some landlords have left the market, new landlords have joined and although there may be an initial drop, most landlords do come back as it is a very lucrative market.

Rental costs have increased over the last few years and now demand is so high in Bristol, landlords have been increasing rents anyway because of market conditions. Those increases are outside of our control and are down to the individual landlord.

Landlords who do not make an application for a licence when they should, will be at risk of enforcement action or even prosecution if they do not licence their properties and yet continue to rent them out. Tenants can apply for Rent Repayment Order if a landlord continues to let a property that has no licence. This means they can get some or all their rent back for the time the property was unlicensed when it should have been. Landlords who do not comply with relevant housing legislation in relation to meeting licensing conditions or addressing disrepair where they have a duty to comply, are at risk of enforcement action including formal enforcement notices, civil penalty notices and prosecution.

There will be a lot of publicity about the scheme to make as many landlords and agents as possible aware of the scheme (and relevant private tenants). Applicants are given three months to make an

application before we consider them to be unlicensed. Those who do not licence when they should, will be investigated by caseworkers to encourage and assist them to apply for a licence to avoid enforcement action. We will work with voluntary and community sector also to ensure the message reaches those who need it. Even properties owned and let by charities will require a licence to ensure conditions are met but no fee will be payable - Section 63(3), Housing Act 2004. Charities are legally exempt from paying a fee but must still make an application, be inspected and meet all licensing standards. Normally landlords will be asked to comply with housing legislation through informal if appropriate or relevant means prior to any formal enforcement action.

As part of the procedure of taking formal legal action in a case, Private Housing consider whether there are any equalities issues that should be considered and actions that should have been taken when deciding whether formal action is to be taken/appropriate/determining level of financial penalty.

If one or both of the proposals to introduce a new licensing scheme(s) are agreed by Cabinet, there will need to be a recruitment round to deliver the administration and inspection of all properties covered by the approved licensing schemes.

1.2 Who will the proposal have the potential to affect?

<input type="checkbox"/> Bristol City Council workforce	<input type="checkbox"/> Service users	<input type="checkbox"/> The wider community
<input type="checkbox"/> Commissioned services	<input type="checkbox"/> City partners / Stakeholder organisations	
Additional comments:		

1.3 Will the proposal have an equality impact?

Yes **No** [please select]

Could the proposal affect access levels of representation or participation in a service, or does it have the potential to change e.g. quality of life: health, education, or standard of living etc.?

If 'No' explain why you are sure there will be no equality impact, then skip steps 2-4 and request review by Equality and Inclusion Team.

If 'Yes' complete the rest of this assessment, or if you plan to complete the assessment at a later stage, please state this clearly here and request review by the Equality and Inclusion Team.

Step 2: What information do we have?

2.1 What data or evidence is there which tells us who is, or could be affected?

Please use this section to demonstrate an understanding of who could be affected by the proposal. Include general population data where appropriate, and information about people who will be affected with particular reference to protected and other relevant characteristics: [How we measure equality and diversity \(bristol.gov.uk\)](http://bristol.gov.uk)

Use one row for each evidence source and say which characteristic(s) it relates to. You can include a mix of qualitative and quantitative data e.g. from national or local research, available data or previous consultations and engagement activities.

Outline whether there is any over or under representation of equality groups within relevant services - don't forget to benchmark to the local population where appropriate. Links to available data and reports are here [Data, statistics and intelligence \(sharepoint.com\)](http://sharepoint.com). See also: [Bristol Open Data \(Quality of Life, Census etc.\)](#); [Joint Strategic Needs Assessment \(JSNA\)](#); [Ward Statistical Profiles](#).

For workforce / management of change proposals you will need to look at the diversity of the affected teams using available evidence such as [HR Analytics: Power BI Reports \(sharepoint.com\)](#) which shows the diversity profile of council teams and service areas. Identify any over or under-representation compared with Bristol economically active citizens for different characteristics. Additional sources of useful workforce evidence include the [Employee Staff Survey Report](#) and [Stress Risk Assessment Form](#)

Data / Evidence Source [Include a reference where known]	Summary of what this tells us												
Census 2021	The Census details the demographic profile of Bristol.												
The population of Bristol Bristol Key Facts 2022	<p>Updated annually. The report brings together statistics on the current estimated population of Bristol, recent trends in population, future projections and looks at the key characteristics of the people living in Bristol.</p> <p>Population Profiles for Equalities Groups bring together detailed analysis looking at equalities groups and how they differ in relation to age, health, employment, education and housing, and maps the distribution of equalities groups across the city.</p>												
Ward profile data (bristol.gov.uk)	The Ward Profiles provide a range of datasets, including population, life expectancy, health and education disparities etc. for each of Bristol’s electoral wards.												
Bristol Quality of Life Survey 2021-22	<p>The Quality of Life (QoL) survey is an annual randomised sample survey of the Bristol population, mailed to 33,000 households (with online & paper options), and some additional targeting to boost numbers from low responding groups. In brief, the most recent QoL survey indicated that inequality and deprivation continue to affect people’s experience in almost every element measured by the survey.</p> <p>The Quality of Life 2021/22 data dashboard highlights those indicators, wards and equality and demographic groups which are better or worse than the Bristol average.</p> <p>For example, there are significant disparities based on people’s characteristics and circumstances in the extent to which they find it difficult to manage financially:</p> <table border="1" data-bbox="655 1765 1497 2094"> <thead> <tr> <th data-bbox="655 1765 975 1854">Quality of Life Indicator</th> <th data-bbox="978 1765 1497 1854">% who find it difficult to manage financially</th> </tr> </thead> <tbody> <tr> <td data-bbox="655 1859 975 1904">16 to 24 years</td> <td data-bbox="978 1859 1497 1904">12.5</td> </tr> <tr> <td data-bbox="655 1908 975 1953">50 years and older</td> <td data-bbox="978 1908 1497 1953">6.7</td> </tr> <tr> <td data-bbox="655 1957 975 2002">65 years and older</td> <td data-bbox="978 1957 1497 2002">3.2</td> </tr> <tr> <td data-bbox="655 2007 975 2051">Female</td> <td data-bbox="978 2007 1497 2051">8.6</td> </tr> <tr> <td data-bbox="655 2056 975 2094">Male</td> <td data-bbox="978 2056 1497 2094">8.5</td> </tr> </tbody> </table>	Quality of Life Indicator	% who find it difficult to manage financially	16 to 24 years	12.5	50 years and older	6.7	65 years and older	3.2	Female	8.6	Male	8.5
Quality of Life Indicator	% who find it difficult to manage financially												
16 to 24 years	12.5												
50 years and older	6.7												
65 years and older	3.2												
Female	8.6												
Male	8.5												

Disabled	21.6
Asian /Asian British	9.9
Black/Black British	19.8
Mixed/Multiple Ethnicity	16.3
White British	7.8
White Minority Ethnic	8.4
Lesbian Gay or Bisexual	12.7
No Religion or Faith	8.0
Christian Religion	8.3
Other Religions	18.2
Carer	10.7
Full Time Carer	14.0
Part Time Carer	9.7
Single Parent	28.6
Two Parent	9.6
Parent (all)	12.0
No Qualifications	10.0
Non-Degree Qualified	12.9
Degree Qualified	6.7
Rented (Council)	20.3
Rented (HA)	20.6
Rented (Private)	14.6
Owner Occupier	4.6
Most Deprived 10%	18.8
Bristol Average	8.7

[HR Analytics: Power BI reports \(sharepoint.com\)](#) [internal link only]

[Equality and Inclusion annual progress report 2021-22 \(bristol.gov.uk\)](#)
Appendix – Workforce Diversity Data – summary analysis

Additional sources of useful workforce evidence include the [Employee Staff Survey Report](#) and [Stress Risk Assessment Form](#) completed by individuals and teams [internal links only]

[Nomis - Official Labour Market Statistics \(nomisweb.co.uk\)](#)

If one or both of the proposals to introduce a new licensing scheme(s) are agreed by Cabinet, there will need to be a recruitment round to deliver the administration and inspection of all properties covered by the approved licensing schemes.

The service has fewer employees who are:

- Young,
- from Asian or Asian British ethnicity
- fewer male than female members of staff

The recruitment process offers the opportunity to further diversify the workforce and will follow usual internal protocol in relation to equality and inclusion.

84% of all people in Bristol are economically active which is higher than nationally (78.6%) and in the South West (80.7%). Of economically active people in Bristol 6.9% are self-employed, compared to 9.5% nationally. Of those who are economically

<p><u>Business demography, UK - Office for National Statistics (ons.gov.uk)</u></p>	<p>inactive in Bristol, 33% are Students, 29% are ‘long-term sick’ and 16% are looking after family/home, as well as 9.2% who are retired. The percentage of ‘workless households’ in Bristol is 12.1%, compared to 13.6% nationally, and the proportion of working age people who are benefit claimants is 11.2%. Bristol has a higher proportion of people working in ‘professional occupations’ (36.2) than for the South West (24.4%) and nationally (25.8%).</p> <p>In 2020 (most recent data) the South West continued to have the highest five-year ‘survival rate’ in the UK of businesses that survived into 2020 (this has been the case since 2012). The largest proportion of these surviving businesses, 22%, was in the professional, scientific and technical industry.</p>
<p><u>Bristol One City: Cost of Living Crisis – Bristol’s One City approach to supporting citizens and communities (Oct 2022)</u></p>	<p>The rising cost of living is not impacting on everyone equally. People who are already experiencing inequity and poverty will be disproportionately impacted:</p> <ul style="list-style-type: none"> • People on the lowest incomes - will have less available income but also pay more for the same services. For example, people unable to pay their bills by Direct Debit and those borrowing money are subject to higher costs and interest rates. This is what anti-poverty campaign group Fair by Design has referred to as a Poverty Premium • Households with pre-payment energy meters - households with pre-payment meters often pay above-average costs for their fuel. They will face a significant rise in their monthly bills in autumn and winter with increased energy usage as they do not benefit from the “smoothing” effect of Direct Debits, which spread usage costs evenly across the year • Parents and young families – parents of young children are more likely to seek credit and alternative support as they are less able, on average, to afford an unexpected expense. Single parents will be disproportionately affected; and one in four single parents find it difficult to manage financially (28.6%). • Disabled people – just under half of all people in poverty in the UK are Disabled people or someone living with a Disabled person. Disabled people have higher living costs, and tend to pay more for their heating, travel, food/diet, prescription payments, and specialist equipment. It is estimated that UK households that include Disabled children pay on average £600 more for their energy bills than an average household • Black and Minoritised people – A higher proportion of Black and minoritised ethnic groups reported finding it difficult to manage financially (14.9%) in 2021. In 2020 the Social Metrics Commission found that almost half of people living in a family in the UK where the head of the household is Black are in poverty. Age UK report that poverty among older Black and minoritised ethnic groups is twice as high as for white pensioners • People in rented accommodation – it is estimated that 69% of low-income private renters in England will be forced to go

	<p>without food and heating at least one day per week to meet rising housing and living cost. Almost three in ten homes in Bristol are privately rented</p> <ul style="list-style-type: none"> • Underserved populations - It is likely that populations that are not typically well represented in data and research are likely to also face increased risk from rising cost of living. For example, refugees and asylum seekers, people experiencing homelessness, and Gypsy/Roma/Traveller groups.
<p>National statistics: English Housing Survey 2021 to 2022: private rented sector</p>	<p>The recently published report found:</p> <ul style="list-style-type: none"> • 14% of private rented sector homes, or 615,000 occupied dwellings, are estimated to contain a Category 1 hazard (for example severe damp and mould). This is higher than for social rented (4%) or owner occupied (10%) dwellings. • Private rented homes were more likely to be non-decent than owner-occupied homes. • Private rented homes were more likely to have damp than all other tenures. Almost 11% (465,000 dwellings) of private rented homes had dampness compared with 4% (177,000 dwellings) of social rented homes and 2% (262,000 dwellings) of owner-occupied homes.
<p>Building Research Establishment (BRE) Bristol City Council report August 2023</p>	<p>The report provides evidence to identify suitable areas or types of housing that would most benefit from the introduction of licensing schemes and meet the licensing criteria in the Housing Act 2004. The proposals going to Cabinet are:</p> <ul style="list-style-type: none"> - To introduce a citywide Additional licensing scheme covering all private rented houses in multiple occupation in the city; and/or - Introduce Selective licensing scheme covering private rented homes three wards: Bishopston and Ashley Down, Cotham and Easton. <p>Licensing will enable the City Council to inspect each licensable property to ensure they meet licensing standards and thereby improving standards for many private tenants in the selected areas.</p> <p>Under the proposal for a citywide Additional licensing scheme covering all houses in multiple occupation it is estimated that 8,041 properties would be affected by the additional licensing proposal. Many vulnerable people live in HMOs and these properties are poorly managed and in poor condition which can result in significant impacts on the local community in which these properties are located.</p> <p>Under the proposal for a targeted selective licensing scheme, it estimated that 4,307 properties would be affected and be required to be licensed and meet licensing standards.</p>

2.2 Do you currently monitor relevant activity by the following protected characteristics?

<input checked="" type="checkbox"/> Age	<input checked="" type="checkbox"/> Disability	<input checked="" type="checkbox"/> Gender Reassignment
<input checked="" type="checkbox"/> Marriage and Civil Partnership	<input checked="" type="checkbox"/> Pregnancy/Maternity	<input checked="" type="checkbox"/> Race
<input checked="" type="checkbox"/> Religion or Belief	<input checked="" type="checkbox"/> Sex	<input checked="" type="checkbox"/> Sexual Orientation

2.3 Are there any gaps in the evidence base?

Where there are gaps in the evidence, or you don't have enough information about some equality groups, include an equality action to find out in section 4.2 below. This doesn't mean that you can't complete the assessment without the information, but you need to follow up the action and if necessary, review the assessment later. If you are unable to fill in the gaps, then state this clearly with a justification.

For workforce related proposals all relevant characteristics may not be included in HR diversity reporting (e.g. pregnancy/maternity). For smaller teams diversity data may be redacted. A high proportion of not known/not disclosed may require an action to address under-reporting.

Although our corporate approach is to collect diversity monitoring for all relevant characteristics, there are gaps in the available local diversity data for some characteristics, especially where this has not always historically been included in census and statutory reporting e.g. for sexual orientation. We also know there are some under-reporting gaps in our workforce diversity information - where personal and confidential information is voluntarily requested from staff. The service has limited diversity data about our service users, and citywide and ward level diversity data is unavailable for some protected characteristics e.g., gender reassignment.

The Building Research Establishment (BRE) report focuses on the property details as licensing is property led irrespective of the tenants except by the number and relationship of the households who occupy these properties to determine the type of licence required where licensing is introduced. Many private landlords and tenants are unknown to us and therefore we do not hold equalities data for the majority of these.

The service does collect the equalities data through our consultations, and we have just completed our 5th consultation on licensing across different areas of the city. The data held is respondents who completed the consultation questionnaires and is not therefore representative of all those who may be affected by the proposal.

The Private Housing Service also has online equalities monitoring forms linked to our online service user forms which service users can choose to complete. However, this has only been fully in place since June and there have not been sufficient responses to allow use of data.

2.4 How have you involved communities and groups that could be affected?

You will nearly always need to involve and consult with internal and external stakeholders during your assessment. The extent of the engagement will depend on the nature of the proposal or change. This should usually include individuals and groups representing different relevant protected characteristics. Please include details of any completed engagement and consultation and how representative this had been of Bristol's diverse communities.

Include the main findings of any engagement and consultation in Section 2.1 above.

If you are managing a workforce change process or restructure please refer to [Managing change or restructure \(sharepoint.com\)](https://sharepoint.com) for advice on consulting with employees etc. Relevant stakeholders for engagement about workforce changes may include e.g. staff-led groups and trades unions as well as affected staff.

We launched a public consultation on our budget proposals between 09th November 2023 to the 21st of December 2023. This consultation set out all the savings proposals we had identified to produce a balanced budget in the context of reduced available funding and increasing financial pressures.

In relation to the two proposed licensing schemes, a public consultation was undertaken between 29th August 2023 and 7th November 2023. The consultation ran for ten weeks via the Ask Bristol hub with an online survey form and paper copies of the consultation documents made available on request and pre-paid envelopes provided for the completed surveys to be returned and uploaded for those with no

access to the internet. A Press release was issued, and the council's private housing website was updated with details about the consultation.

Private Landlords, private tenants and other residents living in the proposed areas were invited by letter or email to participate along with landlord and tenant organisations, councillors and neighbouring LAs. In all 12,636 letters and 43,565 emails were sent during the consultation. The consultation included easy read versions than could be downloaded and sent in the post. Alternative language formats were also available upon request.

Information was posted online and posts on Facebook and on Twitter were made throughout the consultation period. Posters were placed in all 27 libraries and distributed by Community Development Team. Also, an electronic version of the poster shared through their network e.g., Community Exchange network (over 100 organisations), Avon Task groups and other contacts. Landlords who had signed up for the Private Housing Landlord newsletter were also emailed with full details of the consultation and proposals via the Landlord Newsletter including a reminder 3 weeks before the end of the consultation period. Meetings were held both with Landlord and tenant organisations.

The results of the consultation will be published on the Consultation Hub from mid-December 2023. We received 1,562 responses. Overall, 52.57% of respondents agreed with the proposals for a citywide additional licensing scheme and 39.19% disagreed.

38.96% respondents agreed with the proposal for a selective licensing scheme and 51.22% disagreed with the proposal.

2.5 How will engagement with stakeholders continue?

Explain how you will continue to engage with stakeholders throughout the course of planning and delivery. Please describe where more engagement and consultation is required and set out how you intend to undertake it. Include any targeted work to seek the views of under-represented groups. If you do not intend to undertake it, please set out your justification. You can ask the Equality and Inclusion Team for help in targeting particular groups.

All responses to the Budget Consultation will be analysed and included in the Council's Budget report that will be published on the Bristol City Council website in early 2024. We will take Budget consultation responses into account when developing this and other final proposals to put to the Cabinet and a meeting of the Full Council for approval. The final decision will be taken by Full Council at its budget setting meeting in February / March 2024.

Following the setting of the overall budget envelope there will be extensive engagement, consultation and co-design with affected communities on particular proposals which will inform future decision making prior to implementation. Our approach to public engagement and consultation will proactively target under-represented respondents to increase the participation of people with protected, and other characteristics and their local representative organisations. This will help to ensure that our services and actions are informed by the views and needs of all our citizens.

No further contact will made until the Cabinet decision is known at which time we will once again write to all known landlords with properties in the area, with private tenants living in the area and with consultees who wished to be kept informed, of the decision. Also, landlord and tenant organisations will be kept updated through our Bristol landlord's forum and West of England Landlords Panel meetings.

If the scheme is approved by Cabinet, prescribed public notices must be published in two local papers every other week for ten weeks declaring the scheme details.

We will also write out to all those affected again – mainly landlords and tenants and other stakeholders and equalities groups when the scheme is about to go live and update our web pages, newsletters etc. to

publicise as widely as possible with details about how to apply for a licence. Those that remain unlicensed after the initial three-month application period will be contacted and encouraged to make an application, with help from a caseworker if necessary.

We monitor progress throughout the term of the scheme to ensure that all properties that should be licensed are licensed. All properties are inspected, and action is taken to remedy any failings that are undertaken. Statistics are kept throughout on performance and monitored against the scheme's aims. A review of the scheme is taken halfway through and again at the end to check progress is being made and to measure its impact on the number of properties improved, enforcement action taken and analysis of the private rented sector market.

Step 3: Who might the proposal impact?

Analysis of impacts must be rigorous. Please demonstrate your analysis of any impacts of the proposal in this section, referring to evidence you have gathered above, and the characteristics protected by the Equality Act 2010. Also include details of existing issues for particular groups that you are aware of and are seeking to address or mitigate through this proposal. See detailed guidance documents for advice on identifying potential impacts etc. [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#)

3.1 Does the proposal have any potentially adverse impacts on people based on their protected or other relevant characteristics?

Consider sub-categories (different kinds of disability, ethnic background etc.) and how people with combined characteristics (e.g. young women) might have particular needs or experience particular kinds of disadvantage.

Where mitigations indicate a follow-on action, include this in the 'Action Plan' Section 4.2 below.

GENERAL COMMENTS (highlight any potential issues that might impact all or many groups)

Licensing aims to improve living conditions for those renting in the private rented sector, so the overall impact is anticipated to be positive for tenants living in private rented accommodation. All tenants will benefit from any improvements and better management that licensing can bring and may have cost savings through utility bills if property improvement related to energy efficiency. Tenants from particular protected characteristic groups are overrepresented in the private rented sector, for example,

- young people are often over-represented in tenants and so the schemes are anticipated to have a positive impact on young people
- Older people - Most landlords tend to be older who have bought buy-to-let properties as part of their retirement fund
- Disabled tenants should be positively supported if they live in rented accommodation as their homes will be in better repair, well insulated and heated.
- Black, Asian and minority ethnic residents living in the rented sector are less likely to be satisfied overall with the quality of their home in the private rented sector.

The aim of licensing is to improve property conditions and poor management practices in the Private Rented Sector (PRS). The financial impact on landlords is minimal given the income collected from the rent. Additional impact will be a maximum of £7.15 (additional scheme) or £3.50 per week (selective scheme), before discounts. Landlords may have longer term savings through better management of properties in terms of maintenance costs by addressing disrepair before it becomes a more serious issue. Without the proactive work carried out under declared licensing schemes, many properties in the private rented sector could continue to be let in sub-standard conditions and we would only be able to do something about them on a responsive basis.

PROTECTED CHARACTERISTICS

Age: Young People	Does your analysis indicate a disproportionate impact? Yes
Potential impacts:	<ul style="list-style-type: none"> • Young people are often under-represented in engagement and consultation in Bristol and are less satisfied than average with the way the council runs things. • Children and young people in Bristol are considerably more ethnically diverse than the overall population of Bristol. • Children and young people from the most deprived areas of Bristol have the poorest outcomes in health and education in terms of health, education and future employment etc. • Young people in Bristol are more likely to: <ul style="list-style-type: none"> ○ have poor emotional health and wellbeing ○ find inaccessible public transport prevents them from leaving their home when they want to ○ 6.8% of 16–17-year-olds (2020/21) were “not in education, employment or training” (NEET), worse than the national average (5.5%) • Young adults are most likely to have lost work or seen their income drop because of COVID-19 and the cost-of-living crisis. • As most people renting in the private rented sector are younger people, they will be impacted the most by licensing.
Mitigations:	<ul style="list-style-type: none"> • Licensing aims to improve living conditions for those renting in the private rented sector so the overall impact should be positive. All tenants will benefit from any improvements and better management that licensing can bring and may have cost savings through utility bills if property improvement related to energy efficiency. • Please also see Section 1.
Age: Older People	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • Older people in Bristol are: <ul style="list-style-type: none"> ○ less likely to be comfortable using digital services ○ more reliant on public and community transport ○ more likely to be an unpaid carer ○ more likely to help out or volunteer in their community ○ less likely to have formal qualifications • Bristol Ageing Better estimated at least 11,000 older people are experiencing isolation in the city. • We must factor aging and the needs of older people into long term budgeting and service design. • Some landlords rent out property as a retirement fund so licensing and the additional costs involved may impact those and potentially reduce their profit in the first year.
Mitigations:	Licensing aims to improve living conditions for those renting in the private rented sector so the overall impact should be positive. All tenants will benefit from any improvements and better management that licensing can bring and may have cost savings through utility bills if property improvement related to energy efficiency.
Disability	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • 17% of Bristol’s population are disabled. There are more disabled women than men living in Bristol. • A higher proportion of disabled people rent from a social provider (local authority or housing association) • Disabled people should be empowered to make independent living choices and have a say in access to service provision.

	<ul style="list-style-type: none"> • Budget setting needs to provide sufficient resource and flexibility to meet our legal duty to make anticipatory and responsive reasonable adjustments for disabled people including: <ul style="list-style-type: none"> ○ changing the way things are done e.g. opening / working times; ○ changes to overcome barriers created by the physical features of premises. ○ providing auxiliary aids e.g. extra equipment or a different or additional service. ○ is 'anticipatory' so we must think in advance and ongoing about what disabled people might reasonably need. • Disabled people must not be charged for their reasonable adjustments, accessible formats or other adaptations. It is a legal requirement under the Equalities Act to ensure information is accessible to disabled employees and service users. • Tenants: Disabled people in Bristol are less likely to be satisfied overall with their current accommodation, therefore the licensing scheme is likely to have a positive impact on Disabled people and potential health and wellbeing improvements from improved accommodation quality. • Landlords: Disability (including hidden impairments and neurodivergent conditions such as Dyslexia, ADHD, Dyscalculia or Autism) may be a factor in not being able to achieve compliance with legislation.
Mitigations:	<ul style="list-style-type: none"> • Tenants: Licensing aims to improve living conditions for those renting in the PRS so the overall impact should be positive. • Landlords: Checks and balances forms will be completed prior to enforcement to enable officers to identify when Disabled landlords may require reasonable adjustments such as; additional time to complete works, alternative means of communication, additional time or visits with landlords to discuss requirements. BCC will work with landlords to support any reasonable adjustments needed.
Sex	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • The average UK pay gap is 15.4% in favour of men. The Southwest average is 16.6% with women paid 83p for every £1 earned by male counterparts. • Nationally 27% of women experience domestic abuse in their lifetimes. The rate of recorded domestic abuse incidents in Bristol has shown a significant rise over the last two years and 74% of victims were female. • Landlords: Although the service doesn't collect local data, national indicates that female landlords are more likely to own one property (55% of landlords owning one property were female compared to 45% male) English Private Landlord Survey 2021: main report - GOV.UK (www.gov.uk). However male landlords made up a higher proportion of all portfolio size categories owning more than one property.
Mitigations:	<ul style="list-style-type: none"> • Landlords: Although men would appear therefore to be more greatly affected than females by the licensing fees, they are also receiving greater rental income having more than property in the rental market. The fees are payable per property and would only ever come under one scheme not both. As part of the procedure of taking formal legal action in a case, Private Housing consider whether there are any equalities issues that should be considered and actions that should have been taken when deciding whether formal action is to be taken/appropriate/determining level of financial penalty
Sexual orientation	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>

Potential impacts:	<ul style="list-style-type: none"> • The Stonewall <u>LGBT in Britain - Health Report</u> shows LGBT people are at greater risk of marginalisation during health crises, and those with multiple marginalised identities can struggle even more. In communications we should signpost and refer where possible to mutual aid and community support networks². • Research has shown that LGBT people are more likely to be living with long-term health conditions, are more likely to smoke, and have higher rates of drug and alcohol use. • Half of LGBT people experienced depression in the last year • In previous schemes, consultees expressed concern that co-habiting same sex couples will be forced to come out to their landlord to avoid paying licence fees.
Mitigations:	<ul style="list-style-type: none"> • If any three or more people are living in a privately rented property which is not rented as a family dwelling it would be licensable regardless of their relationship status to each other – however they would not be required to declare what the nature of their relationship is. The definition of a family for the purposes of HMO licencing is defined by central government and outside the scope of this proposal. https://www.gov.uk/private-renting/houses-in-multiple-occupation • Under the selective licensing proposal, we are also licensing family accommodation, so the landlord does not need to be made aware of a relationship as all properties need to be licensed and will be based on numbers of occupants and whether it is an HMO or non-HMO. No other details are necessary. • Tenants living in properties in the proposed licensing areas along with landlords and managing agents will be written to as part of the licensing inspection programme and will have an opportunity to discuss options with the visiting offers to determine whether a property does/does not need to be licensed.
Pregnancy / Maternity	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • The Equality Act 2010 applies to those who are pregnant or have given birth in the past 26 weeks, as well as making provisions to protect the rights of breastfeeding mothers. • Ensure there is equality of opportunity for services in relation to pregnancy and maternity. This includes e.g. providing physical access when using prams and pushchairs, and availability of toilets and baby-changing facilities etc., and flexible working patterns and service times for childcare arrangements • Babies and children do not count as an occupant under the Housing Act 1985 in relation to the overcrowding provisions and so are not included in HMO occupants for the purposes of licensing. In fact, some landlords in previous schemes have stopped letting HMOs in preference to letting to families to avoid additional licensing.
Mitigations:	<ul style="list-style-type: none"> • If the property is unlicensed a landlord cannot evict any tenant (including their children or babies using the S21 powers). They can only use the mandatory provisions which are harder to enforce, in unlicensed properties. They can only use the S21 discretionary possession order power to repossess a property if it is licensed.
Gender reassignment	Does your analysis indicate a disproportionate impact? No
Potential impacts:	<ul style="list-style-type: none"> • As sexual orientation above trans people are statistically more vulnerable to verbal and physical abuse. Trans people regularly face prejudice and discrimination because of the way in which they transgress many of the norms of our culture and society. • 1 in 8 trans people (12%) in the workplace have been physically attacked by customers or colleagues in the last year because they were trans

Mitigations:	Gender identity does not need to be declared as part of the licensing process.
Race	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • Ethnic minorities in Bristol experience greater disadvantage than in England and Wales as a whole in education and employment and this is particularly so for Black African people². • In the last census (2011) 16% of the population belonged to a Black, Asian or minority ethnic group and this is likely to be higher now. • Although the race or ethnicity pay gap has narrowed in recent years there are still wide pay differences between particular ethnic groups and most minority ethnic groups earn less on average than White British people. • Bangladeshi, Pakistani, and Black ethnic groups are more likely to live in deprived neighbourhoods; and the same groups and Chinese ethnicities are about twice as likely to live on a low income and experience child poverty compared to White groups • Black, Asian and minoritised ethnic households are less likely to own their home and more likely to living in overcrowded housing and intergenerational households. Bangladeshi and Pakistani groups are more likely to live in multi-family households. • Organisations may lack cultural competence because minoritised ethnic staff are under- represented. • People from Black African, Other, and Black Caribbean groups have persistently high levels of unemployment and almost all ethnic minority groups in Bristol experience employment inequality when compared to White British people. • Black Asian and other minoritised ethnic groups are more likely to be self-employed than the Bristol average and over-represented in low-income self-employment including taxis, takeaway restaurants • People who do not speak English as a main language may require information in plain English and community language translations or videos etc. • If English is not a landlords first language, there may be misunderstanding of the requirement to licence, and they may not understand the implications of enforcement which could lead to non-compliance and enforcement action. • Private tenants who do not speak English as a first language may not be aware of the scheme or their rights as a tenant. • Black, Asian and minority ethnic people in Bristol are also less likely to be satisfied overall with their current accommodation.
Mitigations:	<ul style="list-style-type: none"> • Information about the potential schemes will be disseminated to landlord and tenant groups and stakeholder contacts as well as posting on social media, online and by mail including information about how to access translation and interpretation services. • Renting of private properties is a business, and all landlords of private rented properties should be competent to manage their property(s). If they are not and then it is likely they have an agent or an appointed manager to manage the property for them. • Where circumstances require, and no family member or agent is available to translate, we can arrange for access to translation and interpretation services. • Licensing aims to improve living conditions for those renting in the PRS so the overall impact should be positive
Religion or Belief	Does your analysis indicate a disproportionate impact? No
Potential impacts:	<ul style="list-style-type: none"> • There are at least 45 religions represented in Bristol. Approximately 1 in 20 people in Bristol are Muslim, and Islam is the second religion in Bristol after Christianity

	<ul style="list-style-type: none"> Budget proposals should take into account differing needs because of people's religion and belief (for example different requirements around diet, life events, and holidays)
Mitigations:	
Marriage & civil partnership	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	
Mitigations:	
OTHER RELEVANT CHARACTERISTICS	
Socio-Economic (deprivation)	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> Bristol has 41 areas in the most deprived 10% in England, including 3 in the most deprived 1%. The greatest levels of deprivation are in Hartcliffe & Withywood, Filwood and Lawrence Hill. In Bristol 15% of residents - 70,800 people - live in the 10% most deprived areas in England, including 19,000 children and 7,800 older people. There are an estimated 29,045 households living in fuel poverty in Bristol, 14.4% of all households (BEIS, 2022) 4.6% of households have experienced moderate to severe food insecurity, rising to 11.2% in the most deprived areas of the city (QoL 2021-22) 34.6% of people in Bristol are dissatisfied with the way the Council runs things, but this is 47.5% for people living in the most deprived areas of the city (QoL 2021-22). The inequalities gap in life expectancy between the most and least deprived areas in Bristol is 9.9 years for men and 6.7 years for women.
Mitigations:	<ul style="list-style-type: none"> The positive impact of licensing schemes are the numbers of improvements made to properties that are below minimum standard. This should improve living conditions for tenants who may be from lower socio-economic households. There is a financial cost and for some tenants, landlords will increase rents to cover these additional costs of relevant scheme even though for the majority the costs are low – maximum £7.15 (additional scheme) or £3.50 per week (selective scheme), before discounts. This risk is deemed to be low given the costings for licensing are relatively low. House prices locally will continue to be monitored by BCC.
Carers	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> Being a carer can be a huge barrier to accessing services and maintaining employment We need to consider the timing/availability of services, events etc. to allow flexibility for carers. . Studies show around 65% of adults have provided unpaid care for a loved one. Women have a 50% likelihood of being an unpaid carer by the age of 46 (by age 57 for men) Young carers are often hidden and may not recognise themselves as carers_
Mitigations:	
Other groups [Please add additional rows below to detail the impact for other relevant groups as appropriate e.g. Asylums and Refugees; Looked after Children / Care Leavers; Homelessness]	

Potential impacts:	
Mitigations:	

3.2 Does the proposal create any benefits for people based on their protected or other relevant characteristics?

Outline any potential benefits of the proposal and how they can be maximised. Identify how the proposal will support our [Public Sector Equality Duty](#) to:

- ✓ Eliminate unlawful discrimination for a protected group
- ✓ Advance equality of opportunity between people who share a protected characteristic and those who don't
- ✓ Foster good relations between people who share a protected characteristic and those who don't

The scale of the potential gap in our core funding means that there is very limited opportunity to bring genuine additional benefit to equalities groups in the circumstances. However, we have considered as far as possible the need to: eliminate discrimination, harassment, victimisation and any other conduct prohibited under the Equality Act 2010; advance equality of opportunity between people from different groups; and foster good relations between people from different groups.

Our budget savings proposals are aligned to our Corporate Strategy and although we have limited resources our future focus will be on achieving those priorities, we have identified including tackling poverty and intergenerational inequality.

The aim of licensing is to improve property conditions and as most private tenants are young people, they will feel the improvements more than other groups. All tenants of licensed properties have better protection and are more able to access services if there are issues as each property will have an assigned case officer who can be contacted.

Tenants from particular protected characteristic groups are overrepresented in the private rented sector. Any scheme which encourages better accommodation and better management of the accommodation would therefore benefit people with protected characteristics .

People who spend a considerable proportion of their time at home should benefit from better quality accommodation in particular – e.g., some Disabled people, single parents with small children, some older people.

Tenants with additional vulnerabilities, for example people with mental health needs, women leaving refuges, homeless men and women are increasingly placed in private rented accommodation. The scheme will make it easier for vulnerable tenants and their support workers to identify landlords and letting agencies who are licenced and offer good standards of accommodation.

Some private rented tenants are less settled within their communities than those in social housing or homeowners. Some accommodation sees a high turnover of tenants for example students. Poor quality accommodation can include severe overcrowding and result in a high turnover of tenants. High turnover can cause community cohesion issues with neighbours and creates additional strain on local services e.g., local schools.

Details of landlords who license their properties are placed on a 'Public register' and this information will be available to all. Our web site will also give information and how to contact the council if there are issues with the condition or management of these properties. It is a requirement of the licence to display the contact details of landlord within the rented property and inform the neighbouring property owners the details of the landlord/agent. This will enable tenants and neighbours to report concerns which will ease community cohesion tensions.

It should also make it easier for people to stay in rented accommodation for longer, rather than needing to move because of poor quality accommodation.

We know that some Black, Asian and minority ethnic people and migrants are particularly vulnerable to exploitation regarding poor housing as they are less likely to know their rights and the standards that are deemed acceptable and appropriate. Licensing will highlight their rights through the provision of information, signposting and referrals to the relevant departments and organisations where necessary. For most private tenants licensing will have a positive impact in that the council will ensure that their home is safe and responsibly managed. Under a declared licensing scheme, every licensable property in the area will be inspected and steps taken to ensure the properties meet licensing conditions. This is done without any need for the tenant to contact us as would be necessary outside of licensing in a reactive complaint service.

The equalities screening process used by officers prior to enforcement action aims to eliminate unlawful discrimination, and advance equality of opportunity by the provision of relevant information and removing barriers such as communication barriers.

Step 4: Impact

4.1 How has the equality impact assessment informed or changed the proposal?

What are the main conclusions of this assessment? Use this section to provide an overview of your findings. This summary can be included in decision pathway reports etc.

If you have identified any significant negative impacts which cannot be mitigated, provide a justification showing how the proposal is proportionate, necessary, and appropriate despite this.

Summary of significant negative impacts and how they can be mitigated or justified:

There are concerns around the cost of the fees both on landlords and on the tenants - if the costs are passed on to the tenants but at a maximum fee equivalent of £5 pw or £3pw it is hoped that increase is minimal given the income collected from the rent and all tenants will benefit from any improvements and better management that licensing can bring.

There are risks that landlords may leave the rental market rather than pay the fees but the rental income they can receive far outweighs this one-off cost of selective and additional licensing. Analysis from previous schemes has shown that although there are fluctuations and some may initially leave, they seem to come back into the market especially as demand is currently so high.

Rental costs have increased over the last few years across the city and now demand is so high in Bristol, landlords have been increasing rents to take advantage of this market. Those increases are outside of our control and are down to the individual landlord.

Some landlords may try to continue to operate below the radar and not apply for a licence. However, we have a team of officers who investigate those properties that we believe require a licence and will encourage them to apply for a licence and meet licensing conditions or face prosecution if they still fail to engage. In those situations, we can assist tenants to make an application for a Rent Repayment Order as a landlord cannot legally charge a rent while being unlicensed when the property is required to be licensed.

As part of the procedure of taking formal legal action in a case, Private Housing consider whether there are any equalities issues that should be considered and actions that should have been taken when deciding whether formal action is to be taken and appropriate. The enforcement process normally

allows for landlords to provide representations which will be considered. See checks and balances form attached.

Summary of positive impacts / opportunities to promote the Public Sector Equality Duty:

Licensing will improve property conditions and poor management practises in the private rental sector properties in the area and should have a positive impact on the local community if property standards are being improved and issues around ASB (Anti-Social Behaviour), noise etc are being dealt with. So, all people who live in these privately rented properties and other residents of various characteristics will feel the benefit.

We hope that individuals will be empowered to report poor conditions and poor management practises as we will already be involved in an inspection programme etc. so the tenants do not have to fear retaliatory action if they report anything because the landlord will assume that the actions, we take are normal licensing activity.

4.2 Action Plan

Use this section to set out any actions you have identified to improve data, mitigate issues, or maximise opportunities etc. If an action is to meet the needs of a particular protected group, please specify this.

Improvement / action required	Responsible Officer	Timescale
All relevant EqlAs will be published on the Council's website https://www.bristol.gov.uk/council-spending-performance/council-budgets and continue to be updated as appropriate.		

4.3 How will the impact of your proposal and actions be measured?

How will you know if you have been successful? Once the activity has been implemented this equality impact assessment should be periodically reviewed to make sure your changes have been effective your approach is still appropriate.

Our Equality and Inclusion Annual Progress Reports show what we have done to achieve the aims of our Equality and Inclusion policy and strategy, and the progress we have made including reporting on all relevant KPIs and workforce diversity [Equalities policy - bristol.gov.uk](https://www.bristol.gov.uk/equalities-policy)

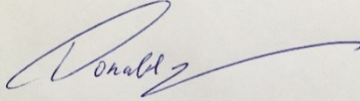
We monitor progress throughout the term of the scheme to ensure that all properties that should be licensed are licensed. All properties are inspected and action to remedy any failings are undertaken. A review of the scheme is taken halfway through and again at the end to check progress is being made and to measure its impact on the number of properties improved, enforcement action taken and analysis of the PRS market.

The Equality and Inclusion Team need at least five working days to comment and feedback on your EqlA. EqlAs should only be marked as reviewed when they provide sufficient information for decision-makers on the equalities impact of the proposal. Please seek feedback and review from the [Equality and Inclusion Team](#) before requesting sign off from your Director¹.

Equality and Inclusion Team Review:
Reviewed by the Equality and Inclusion Team

Director Sign-Off: Donald Graham, Director Housing and Landlord Services

¹ Review by the Equality and Inclusion Team confirms there is sufficient analysis for decision makers to consider the likely equality impacts at this stage. This is not an endorsement or approval of the proposal.

		
Date: 22/12/2023	22/12/2023	

Equality Impact Assessment [version 2.12]



Title: GAP18 Complex Homecare Reviews	
<input type="checkbox"/> Policy <input type="checkbox"/> Strategy <input type="checkbox"/> Function <input type="checkbox"/> Service <input type="checkbox"/> Other [please state] <i>Saving Proposal</i>	<input checked="" type="checkbox"/> New <input type="checkbox"/> Already exists / review <input type="checkbox"/> Changing
Directorate: Adults and Communities	Lead Officer name: Richard Hills
Service Area: Adult Social Care	Lead Officer role: Deputy Director - Commissioning

Step 1: What do we want to do?

The purpose of an Equality Impact Assessment is to assist decision makers in understanding the impact of proposals as part of their duties under the Equality Act 2010. Detailed guidance to support completion can be found here [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](https://sharepoint.com).

This assessment should be started at the beginning of the process by someone with a good knowledge of the proposal and service area, and sufficient influence over the proposal. It is good practice to take a team approach to completing the equality impact assessment. Please contact the Equality and Inclusion Team early for advice and feedback.

1.1 What are the aims and objectives/purpose of this proposal?

Briefly explain the purpose of the proposal and why it is needed. Describe who it is aimed at and the intended aims / outcomes. Where known also summarise the key actions you plan to undertake. Please use plain English, avoiding jargon and acronyms. Equality Impact Assessments are viewed by a wide range of people including decision-makers and the wider public.

Every year, the council must agree an annual budget which balances the money we spend with the money we are expecting to receive. Councils across the country are continuing to face financial challenges and based on our current forecasts, we face a funding gap over the next five years (to 2028/29) of up to £81.2 million dependent on the severity of factors such as inflation, funding changes, and unavoidable service pressures. This is in addition to the £17.7 million of savings and efficiencies proposals for 2024-2028 outlined in the 2023/24 budget and assumed delivery of 2023/24 savings in the current year.

The Council has defined statutory responsibilities, but deliver against a far broader agenda, providing universal services benefiting the whole community, and targeted services aimed at individuals, communities with particular needs, and businesses – administered by our workforce, city partners, stakeholder organisations and commissioned services.

To address these challenges, we are looking across all of our services with a focus on:

- maximising our transformation programmes – where we are looking to improve services whilst achieving the best value for money
- income opportunities – where we are looking to improve our external income and most effectively apply that income
- targeted reviews – where we are looking at services that are comparatively high in cost compared to other councils to see where we can do things differently to reduce costs, be more efficient in how we do things and, in some cases, stop doing some things entirely.

This proposal

ASC Delivery Partner Diagnostic and Delivery

During June-August 2023, Peopletoo were commissioned as the Adult Social Care Delivery Partner to carry out a review of Bristol City Council's Adult Social Care to measure current performance and develop proposals to reduce the budget overspend. The diagnostic found that there was an opportunity to review complex homecare packages to support best outcomes for people and value for money.

The proposal is to increase the volume of reviews of individuals receiving complex homecare packages using both existing citywide reviews capacity alongside additional locum resource through targeted negotiation and contract management. Complex home care packages are defined by Peopletoo's diagnostic work as people either receiving 40 hours or more of home care per week or a Direct Payment with a personal budget of over £920.00 per week.

What is the project?

This project seeks to reduce the number of clients with complex home care packages who are overdue a review, to improve independence, and good outcomes following a high-quality strengths-based review. Complex home care packages will vary from person to person but will normally include at least 4 to 5 visits per day to assist with personal care and other activities of daily living. For some individuals they may have 2 carers per visit in order to assist with manual handling activities (eg getting in and out of bed or chair). It might also include some form of care or monitoring during nighttime. For some of these individuals the level of care might even include 24 hours a day.

Why was this identified?

The diagnostic exercise established a number of people who had not had a review in over a year and is therefore overdue. Due to the variation in needs over time these individuals could be experiencing insufficient support and therefore a strengths-based review is required to ensure care is appropriate and improve outcomes.

What does it seek to achieve?

Due to the workforce shortages in Bristol City Council's Adult Social Care (ASC) Teams, this cannot be quickly implemented within existing capacity. This project therefore focuses on a prioritised approach to reviewing people in receipt of complex homecare alongside a number of other key priority review cohorts of people, referenced in other EQIAs in the proposals pack, who are overdue a review. In order to increase output, we have agreed to bring in additional short-term capacity to carry out these reviews. As a result, people will be receiving more appropriate services and their independence will be supported and promoted.

Additional staffing capacity will be sourced using a recruitment business partner to source up to 10 full-time social workers to carry out targeted reviews for people with complex homecare alongside existing practitioners within the Citywide Reviewing Team. Staffing resource has been identified and we plan to begin onboarding new staff due, with a start date of January 2024.

Additional Locum staff will be funded through transformation budget and work closely alongside existing review teams using Social Work staff and managers. Additional managerial capacity has been identified to support this.

1.2 Who will the proposal have the potential to affect?

Bristol City Council workforce

Service users

The wider community

<input checked="" type="checkbox"/> Commissioned services	<input type="checkbox"/> City partners / Stakeholder organisations
Additional comments:	

1.3 Will the proposal have an equality impact?

Could the proposal affect access levels of representation or participation in a service, or does it have the potential to change e.g. quality of life: health, education, or standard of living etc.?

If 'No' explain why you are sure there will be no equality impact, then skip steps 2-4 and request review by Equality and Inclusion Team.

If 'Yes' complete the rest of this assessment, or if you plan to complete the assessment at a later stage please state this clearly here and request review by the Equality and Inclusion Team.

<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	[please select]
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Those who received complex homecare packages as defined by People Too workstreams will be more likely to receive an annual review or reassessment of their care and support needs. This will better enable BCC to ensure it is compliant with Care and Support statutory guidance, that people's needs are being met and we are delivering best value.

Step 2: What information do we have?

2.1 What data or evidence is there which tells us who is, or could be affected?

Please use this section to demonstrate an understanding of who could be affected by the proposal. Include general population data where appropriate, and information about people who will be affected with particular reference to protected and other relevant characteristics: [How we measure equality and diversity \(bristol.gov.uk\)](http://bristol.gov.uk)

Use one row for each evidence source and say which characteristic(s) it relates to. You can include a mix of qualitative and quantitative data e.g. from national or local research, available data or previous consultations and engagement activities.

Outline whether there is any over or under representation of equality groups within relevant services - don't forget to benchmark to the local population where appropriate. Links to available data and reports are here [Data, statistics and intelligence \(sharepoint.com\)](http://sharepoint.com). See also: [Bristol Open Data \(Quality of Life, Census etc.\)](#); [Joint Strategic Needs Assessment \(JSNA\)](#); [Ward Statistical Profiles](#).

For workforce / management of change proposals you will need to look at the diversity of the affected teams using available evidence such as [HR Analytics: Power BI Reports \(sharepoint.com\)](http://sharepoint.com) which shows the diversity profile of council teams and service areas. Identify any over or under-representation compared with Bristol economically active citizens for different characteristics. Additional sources of useful workforce evidence include the [Employee Staff Survey Report](#) and [Stress Risk Assessment](#)

Data / Evidence Source [Include a reference where known]	Summary of what this tells us
Census 2021	The Census details the demographic profile of Bristol.
The population of Bristol	Updated annually. The report brings together statistics on the current estimated population of Bristol, recent trends in population, future projections and looks at the key characteristics of the people living in Bristol.

<p>Bristol Key Facts 2022</p>	<p>Population Profiles for Equalities Groups bring together detailed analysis looking at equalities groups and how they differ in relation to age, health, employment, education and housing, and maps the distribution of equalities groups across the city.</p>																																
<p>Ward profile data (bristol.gov.uk)</p>	<p>The Ward Profiles provide a range of data-sets, including population, life expectancy, health and education disparities etc. for each of Bristol’s electoral wards.</p>																																
<p>Bristol Quality of Life Survey 2021-22</p>	<p>The Quality of Life (QoL) survey is an annual randomised sample survey of the Bristol population, mailed to 33,000 households (with online & paper options), and some additional targeting to boost numbers from low responding groups. In brief, the most recent QoL survey indicated that inequality and deprivation continue to affect people’s experience in almost every element measured by the survey.</p> <p>The Quality of Life 2021/22 data dashboard highlights those indicators, wards and equality and demographic groups which are better or worse than the Bristol average.</p> <p>For example there are significant disparities based on people’s characteristics and circumstances in the extent to which they find it difficult to manage financially:</p> <table border="1" data-bbox="667 1234 1246 2089"> <thead> <tr> <th>Quality of Life Indicator</th> <th>% who find it difficult to manage financially</th> </tr> </thead> <tbody> <tr> <td>16 to 24 years</td> <td>12.5</td> </tr> <tr> <td>50 years and older</td> <td>6.7</td> </tr> <tr> <td>65 years and older</td> <td>3.2</td> </tr> <tr> <td>Female</td> <td>8.6</td> </tr> <tr> <td>Male</td> <td>8.5</td> </tr> <tr> <td>Disabled</td> <td>21.6</td> </tr> <tr> <td>Asian /Asian British</td> <td>9.9</td> </tr> <tr> <td>Black/Black British</td> <td>19.8</td> </tr> <tr> <td>Mixed/Multiple Ethnicity</td> <td>16.3</td> </tr> <tr> <td>White British</td> <td>7.8</td> </tr> <tr> <td>White Minority Ethnic</td> <td>8.4</td> </tr> <tr> <td>Lesbian Gay or Bisexual</td> <td>12.7</td> </tr> <tr> <td>No Religion or Faith</td> <td>8.0</td> </tr> <tr> <td>Christian Religion</td> <td>8.3</td> </tr> <tr> <td>Other Religions</td> <td>18.2</td> </tr> </tbody> </table>	Quality of Life Indicator	% who find it difficult to manage financially	16 to 24 years	12.5	50 years and older	6.7	65 years and older	3.2	Female	8.6	Male	8.5	Disabled	21.6	Asian /Asian British	9.9	Black/Black British	19.8	Mixed/Multiple Ethnicity	16.3	White British	7.8	White Minority Ethnic	8.4	Lesbian Gay or Bisexual	12.7	No Religion or Faith	8.0	Christian Religion	8.3	Other Religions	18.2
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Carer	10.7
Full Time Carer	14.0
Part Time Carer	9.7
Single Parent	28.6
Two Parent	9.6
Parent (all)	12.0
No Qualifications	10.0
Non-Degree Qualified	12.9
Degree Qualified	6.7
Rented (Council)	20.3
Rented (HA)	20.6
Rented (Private)	14.6
Owner Occupier	4.6
Most Deprived 10%	18.8
Bristol Average	8.7

[Joint Strategic Needs Assessment \(JSNA\)](#)

The Joint Strategic Needs Assessment reports on the health and wellbeing needs of the people of Bristol. It brings together detailed information on local health and wellbeing needs and looks ahead at emerging challenges and projected future needs. The JSNA is used to provide a comprehensive picture of the health and wellbeing needs of Bristol (now and in the future); to inform decisions about how we design, commission and deliver services, and also about how the urban environment is planned and managed; to improve and protect health and wellbeing outcomes across the city while reducing health inequalities; and to provide partner organisations with information on the changing health and wellbeing needs of Bristol, at a local level, to support better service delivery.

[HR Analytics: Power BI reports \(sharepoint.com\)](#) [internal link only]

[Equality and Inclusion annual progress report 2021-22 \(bristol.gov.uk\)](#)

Appendix – Workforce Diversity Data – summary analysis

[Additional sources of useful workforce evidence include the Employee Staff Survey Report and Stress Risk Assessment Form completed by](#)

The Workforce Diversity Report shows Bristol City Council Workforce Diversity statistics for Headcount, Sickness, Starters and Leavers data. The report is updated once a month with data as at the end of the previous month. It excludes data for locally managed schools/nurseries, councillors, casual, seasonal and external agency employees. The report is based on the sensitive information that staff add to Employee Self Service on iTrent (ESS).

Summary of Bristol City Council workforce diversity

	BCC headcount % (31 Oct 2022)	Bristol Working Age Population (16-64)
Age 65+	12.2%	39.0%

individuals and teams [internal links only]	Age 30-39	22.0%	24.0%
	Age 40-49	24.4%	16.0%
	Age 50-64	41.4%	21.0%
	Age 65+	3.4%	-
	Disabled	9.0%	12%
	Asian / Asian British	2.9%	5.8%
	Black / Black British	5.1%	5.3%
	Mixed ethnicity	3.6%	2.9%
	Other ethnic groups	0.4%	1.0%
	White	79.8%	85.0%
	Female	60.1%	49.0%
	Male	39.3%	51.0%
	Use another gender term	0.2%	-
	Christian	25.9%	43.5%
	Other religion/belief	6.6%	7.3%
	No religion/belief	41.9%	41.5%
	Lesbian, Gay or Bisexual	5.9%	9.1%
Trans	0.1%	-	

[Nomis - Official Labour Market Statistics \(nomisweb.co.uk\)](#)

[Business demography, UK - Office for National Statistics \(ons.gov.uk\)](#)

84% of all people in Bristol are economically active which is higher than nationally (78.6%) and in the South West (80.7%). Of economically active people in Bristol 6.9% are self-employed, compared to 9.5% nationally. Of those who are economically inactive in Bristol, 33% are Students, 29% are 'long-term sick' and 16% are looking after family/home, as well as 9.2% who are retired. The percentage of 'workless households' in Bristol is 12.1%, compared to 13.6% nationally, and the proportion of working age people who are benefit claimants is 11.2%. Bristol has a higher proportion of people working in 'professional occupations' (36.2) than for the South West (24.4%) and nationally (25.8%).

In 2020 (most recent data) the South West continued to have the highest five-year 'survival rate' in the UK of businesses that survived into 2020 (this has been the case since 2012). The largest proportion of these surviving businesses, 22%, was in the professional, scientific and technical industry.

[Bristol One City: Cost of Living Crisis – Bristol's One City approach to supporting citizens and communities \(Oct 2022\)](#)

The rising cost of living is not impacting on everyone equally. People who are already experiencing inequity and poverty will be disproportionately impacted:

- **People on the lowest incomes** - will have less available income to pay more for the same services. For

example, people unable to pay their bills by Direct Debit and those borrowing money are subject to higher costs and interest rates. This is what anti-poverty campaign group Fair by Design has referred to as a Poverty Premium

- **Households with pre-payment energy meters** - households with pre-payment meters often pay above-average costs for their fuel. They will face a significant rise in their monthly bills in autumn and winter with increased energy usage as they do not benefit from the “smoothing” effect of Direct Debits, which spread usage costs evenly across the year
- **Parents and young families** – parents of young children are more likely to seek credit and alternative support as they are less able, on average, to afford an unexpected expense. Single parents will be disproportionately affected; and one in four single parents find it difficult to manage financially (28.6%).
- **Disabled people** – just under half of all people in poverty in the UK are Disabled people or someone living with a Disabled person. Disabled people have higher living costs, and tend to pay more for their heating, travel, food/diet, prescription payments, and specialist equipment. It is estimated that UK households that include Disabled children pay on average £600 more for their energy bills than an average household
- **Black and Minoritised people** – A higher proportion of Black and minoritised ethnic groups reported finding it difficult to manage financially (14.9%) in 2021. In 2020 the Social Metrics Commission found that almost half of people living in a family in the UK where the head of the household is Black are in poverty. Age UK report that poverty among older Black and minoritised ethnic groups is twice as high as for white pensioners
- **People in rented accommodation** – it is estimated that 69% of low-income private renters in England will be forced to go without food and heating at least one day per week to meet rising housing and living cost. Almost three in ten homes in Bristol are privately rented
- **Underserved populations** - It is likely that populations that are not typically well represented in data and research are likely to also face increased risk from rising cost of living. For example, refugees and asylum seekers,

	people experiencing homelessness, and Gypsy/Roma/Traveller groups.
An evaluation of the Bristol Race Equality Covid-19 Steering Group	Report focusing on how co-production using a One City approach has been used to respond to the disproportionate impact of the Covid-19 pandemic on our marginalized ethnic communities.
Designing a new social reality - Research on the impact of covid-19 on Bristol's VCSE sector and what the future should be – Black South West Network 2020	Local research has highlighted how long-term underinvestment and lack of equity in funding and procurement has eroded the local Voluntary and community sector.
Delivering an inclusive economy post COVID-19	Our local partners have conducted research into the ongoing impact of COVID-19 for women and have provided recommendations on what service providers can do to reduce impact further impact.
Power BI reporting of individual's receiving complex home care and or direct payments - (internal link BCC only)	<p>191 people currently identified receiving home care or direct payment (DP) rate at equivalent of 40 hours per week or a personal budget/ direct payment of at least £920 per week. Of them 34 have been identified as being overdue an annual care and support review.</p> <p>Given the way in which data is provided it is not possible to break down demographic breakdowns of this specific cohort without significant delay. We can however draw on wider demographic info of all individuals receiving home care and direct payments which should give a general indicator as to whether this intervention will more likely impact on individuals with protected characteristics.</p> <p>Demographic data indicates that 44% of individuals receiving care at home are aged between 18 and 64 and 56% are over 65.</p> <p>This is compared against all individuals receiving any type of care and support 49.2% were aged under 65 and 50.8% over 65. This indicates that those receiving home care or using a DP were more likely to be older.</p> <p>More detailed age breakdown also supports narrative that people with home care or DP are older compared to everyone receiving care and support . 48.2% of those receiving home care and direct payments are aged over 70 compared to 43% of everyone receiving care and support</p>

	<p>Data appears to indicate that those impacted by this practice will be more likely to be female with 63% of individuals receiving home care or DP's and 37% male. This is compared to 54% female and 46% male for all individuals receiving care and support</p> <p>In terms of ethnicity individual's receiving home care or DP's tend to be more diverse with 23.5% identifying as black, Asian or minoritised ethnic group compared to 18.25% of all individuals receiving all sorts of care. (N.B. 9% are reporting as don't know in both groups).</p> <p>75.8% of total no. of people receiving care and support are white, whereas the figure for individuals just receiving home care or direct payments is lower at 67%.</p> <p>Whilst data on religion is incomplete (due to it being a non mandatory field on Adult Social Care database system (Liquid Logic Adult System LAS)so practitioner's don't always ask this info), information available also supports the view that those receiving home care or DPs are more likely to come from a minority group as 20% identified as Muslim compared to 13% in the wider group. There did not appear to be any significant different between the two groups of individuals identifying as Christian (any denomination) 10% for both groups or no religion 4.4% for home care & DP and 4.3% for total group.</p>
<p>Additional comments:</p>	

2.2 Do you currently monitor relevant activity by the following protected characteristics?

<input type="checkbox"/> Age	<input type="checkbox"/> Disability	<input type="checkbox"/> Gender Reassignment
<input type="checkbox"/> Marriage and Civil Partnership	<input type="checkbox"/> Pregnancy/Maternity	<input type="checkbox"/> Race
<input type="checkbox"/> Religion or Belief	<input type="checkbox"/> Sex	<input type="checkbox"/> Sexual Orientation

2.3 Are there any gaps in the evidence base?

Where there are gaps in the evidence, or you don't have enough information about some equality groups, include an equality action to find out in section 4.2 below. This doesn't mean that you can't complete the assessment without the information, but you need to follow up the action and if necessary, review the assessment later. If you are unable to fill in the gaps, then state this clearly with a justification.

For workforce related proposals all relevant characteristics may not be included in HR diversity reporting (e.g. pregnancy/maternity). For smaller teams diversity data may be redacted. A high proportion of not known/not disclosed may require an action to address under-reporting.

Due to the limitations of our available reporting on Power BI we are not able to give clear breakdown of exact characteristics of the 191 individual identified as receiving complex home care or DP with personal budget over £920 per week, or the 32 people who are overdue an annual review. Existing data and insight team do not have the capacity to develop this report within available timeframe but this will be developed in future.

Although our corporate approach is to collect diversity monitoring for all relevant characteristics, there are gaps in the available local diversity data for some characteristics, especially where this has not always historically been included in census and statutory reporting e.g. for sexual orientation.

We also know there are some under-reporting gaps in our workforce diversity information - where personal and confidential information is voluntarily requested from staff. Our Power BI report currently only reports on sex, ethnicity, age and religion and does not report on gender reassignment or sexual orientation. We are updating our guidance and training offer for Adult Social Care (ASC) to ensure greater compliance around asking for this information from our citizens.

In terms of future demand more information is required about makeup of adults who might approach adult care in the future requiring complex homecare, or those whose needs will increase and change to require that level of care. By working more closely with Bristol, North Somerset and South Gloucestershire Integrated Care Board, and wider system partners this can help us to better predict future demand for this group.

2.4 How have you involved communities and groups that could be affected?

You will nearly always need to involve and consult with internal and external stakeholders during your assessment. The extent of the engagement will depend on the nature of the proposal or change. This should usually include individuals and groups representing different relevant protected characteristics. Please include details of any completed engagement and consultation and how representative this had been of Bristol's diverse communities.

Include the main findings of any engagement and consultation in Section 2.1 above.

If you are managing a workforce change process or restructure please refer to [Managing a change process or restructure \(sharepoint.com\)](#) for advice on consulting with employees etc. Relevant stakeholders for engagement about workforce changes may include e.g. staff-led groups and trades unions as well as affected staff.

We launched a public consultation on our budget proposals between 09th November 2023 to the 21st December 2023. This consultation set out all the savings proposals we had identified to produce a balanced budget in the context of reduced available funding and increasing financial pressures.

2.5 How will engagement with stakeholders continue?

Explain how you will continue to engage with stakeholders throughout the course of planning and delivery. Please describe where more engagement and consultation is required and set out how you intend to undertake it. Include any targeted work to seek the views of under-represented groups. If you do not intend to undertake it, please set out your justification. You can ask the Equality and Inclusion Team for help in targeting particular groups.

All responses to the Budget Consultation will be analysed and included in the Council's Budget report that will be published on the Bristol City Council website in early 2023. We will take Budget consultation responses into account when developing this and other final proposals to put to the Cabinet and a meeting of the Full Council for approval. The final decision will be taken by Full Council at its budget setting meeting in February / March 2024.

Following the setting of the overall budget envelope there will be extensive engagement, consultation and co-design with affected communities on particular proposals which will inform future decision making prior to implementation. Our approach to public engagement and consultation will proactively target under-represented respondents to increase the participation of people from equality groups and

their local representative organisations. This will help to ensure that our services and actions are informed by the views and needs of all our citizens.

We have discussed our proposals with existing operational teams who will be leading on these targeted reviews to ensure their practice expertise is taken on board when considering how to prioritise and approach the reviews of individual with complex home care and direct payments.

Step 3: Who might the proposal impact?

Analysis of impacts must be rigorous. Please demonstrate your analysis of any impacts of the proposal in this section, referring to evidence you have gathered above and the characteristics protected by the Equality Act 2010. Also include details of existing issues for particular groups that you are aware of and are seeking to address or mitigate through this proposal. See detailed guidance documents for advice on identifying potential impacts etc. [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#)

3.1 Does the proposal have any potentially adverse impacts on people based on their protected or other relevant characteristics?

Consider sub-categories and how people with combined characteristics (e.g. young women) might have particular needs or experience particular kinds of disadvantage.

Where mitigations indicate a follow-on action, include this in the 'Action Plan' Section 4.2 below.

GENERAL COMMENTS (highlight any potential issues that might impact all or many groups)

Even when we plan to consult in more detail on specific service delivery proposals at a later time, we must ensure that any budget setting decisions that are likely to affect future services are informed by sufficient consultation and proper analysis. This is so that decision makers can have due regard to any likely disproportionate or negative impact on the basis of their protected and other relevant characteristics at the time the budget is approved – not afterwards¹.

Decision makers will have the ability to make changes to the individual spending plans following further consultation as appropriate and detailed evaluation of the impact of specific proposals. Within the proposed budget envelope there will be financial mitigation put aside for any non-delivery or amendments to proposals which may occur due to future consideration of equalities issues or other factors.

As well as identifying whether budget changes will have a disproportionate impact on particular groups (e.g., because they are over-represented in a particular cohort), we need to pay particular attention to the risk of indirect discrimination: when an apparently neutral decision puts members of a given group at a particular disadvantage compared with other people because of their different needs and circumstances.

We are also aware of existing structural inequalities and particular considerations, issues, and disparities for people in Bristol based on their characteristics, which we will take into account.

With all individuals who will receive annual care and support review as part of this project our social work staff will take an individualized, personalized, strength-based approach to carrying out these reviews, to ensure their voice and wishes are heard, and their identified outcomes met. We will also work closely with the provider and commissioners to ensure that care and support provided represents best value for money.

As part of this review, we will work with each individual to consider their individual needs and circumstances including related to their protected characteristics. We will ensure that people are supported fairly and that their needs and preferences are considered. We will seek to fully involve individual in the assessment and support plan process.

PROTECTED CHARACTERISTICS

Age: Young People	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • Young people are often under-represented in engagement and consultation in Bristol and are less satisfied than average with the way the council runs things. • Children and young people in Bristol are considerably more ethnically diverse than the overall population of Bristol. • Children and young people from the most deprived areas of Bristol have the poorest outcomes in health and education in terms of health, education and future employment etc. • Young people in Bristol are more likely to: <ul style="list-style-type: none"> ○ have poor emotional health and wellbeing ○ find inaccessible public transport prevents them from leaving their home when they want to ○ 6.8% of 16-17 year olds (2020/21) were “not in education, employment or training” (NEET), worse than the national average (5.5%) • Young adults are most likely to have lost work or seen their income drop because of COVID-19 and the cost of living crisis
Mitigations:	<p>See 'General Comments' above</p> <p>We will be taking a strengths-based approach that will ensure that young people have a voice and are provided with different opportunities that maximise their well-being and independence. We will continue to apply the wellbeing principle as enshrined in 'The Care Act' when considering how we meet the needs of service users.</p> <p>Any decisions around meeting needs of younger Disabled people will need to ensure we consider their wellbeing and clearly evidence how any provision of care and support services promotes their wellbeing and doesn't impact on their Human Rights. Any decisions will be made on an individual, case by case basis.</p>
Age: Older People	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • Older people in Bristol are: <ul style="list-style-type: none"> ○ less likely to be comfortable using digital services ○ more reliant on public and community transport ○ more likely to be an unpaid carer ○ more likely to help out or volunteer in their community ○ less likely to have formal qualifications • Bristol Ageing Better estimated at least 11,000 older people are experiencing isolation in the city. • We must factor aging and the needs of older people into long term budgeting and service design • The available data suggests that older people are likely to be over-represented in service-users of complex homecare
Mitigations:	See 'General Comments' above

	<p>Through taking a strengths-based approach to the way we work with people; we need to ensure that older people are in control of their care and support and are enabled to access alternative support options with any support they need. If we are using digital technology as an alternative way of providing support, we must ensure that this is appropriate and that they are enabled to use it safely and effectively and that it supports their independence. When carrying out reviews with older people in receipt of complex home care / high cost direct payment we will ensure that adult care staff consider needs on a case-by-case basis and ensure we promote wellbeing.</p>
Disability	<p>Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p>
Potential impacts:	<ul style="list-style-type: none"> • 17% of Bristol’s population are disabled. There are more disabled women than men living in Bristol. • In 2021, the disability pay gap was 13.8% with disabled employees earning a median of £12.10 per hour and non-disabled employees a median of £14.03 per hour. • Disabled people are less likely to be employed in a managerial or professional occupation • the national disability employment rate was 52.7% in Q2 2021, compared to 81.0% for non-disabled people. • Disabled workers move out of work at nearly twice the rate (8.8%) of non-disabled workers (4.9%). Workless disabled people move into work at nearly one-third of the rate (11.0%) of workless non-disabled people (26.9%) • Disability increases with age: 4.1% of all children, for the working age population it increases to 12.3% and for people aged 65 and over it increases to 55.9%. • Disabled people on average have lower qualification levels than the population as a whole. • A higher proportion of disabled people rent from a social provider (local authority or housing association) • Disabled people have lower car ownership levels • Disabled people experience higher rates of hate crime and domestic abuse compared to the general population • Disabled people should be empowered to make independent living choices and have a say in access to service provision. • Budget setting needs to provide sufficient resource and flexibility to meet our legal duty to make anticipatory and responsive reasonable adjustments for disabled people including: <ul style="list-style-type: none"> ○ changing the way things are done e.g. opening / working times; ○ changes to overcome barriers created by the physical features of premises. ○ providing auxiliary aids e.g. extra equipment or a different or additional service. ○ is ‘anticipatory’ so we must think in advance and ongoing about what disabled people might reasonably need. • Disabled people must not be charged for their reasonable adjustments, accessible formats or other adaptations. It is a legal requirement under the Equalities Act to ensure information is accessible to disabled employees and service users.
Mitigations:	<p>See 'General Comments' above</p> <p>We will ensure that people are supported fairly and that their needs and preferences are considered. We will seek to fully involve individual in the assessment and support plan process, if the individual requires, or is entitled to an advocate then we will ensure this is arranged. Where appropriate we will seek specialist input from a clinician or other allied health professional to support with the annual review.</p>

Sex	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • The average UK pay gap is 15.4% in favour of men. The South West average is 16.6% with women paid 83p for every £1 earned by male counterparts. • Women still bear the majority of caring responsibilities for both children and older relatives. • Women are more likely to be excluded from conversations which affect decision making due to lack of representation in boards / organisational leadership. • Services and workplace requirements may not take into consideration the impact of women's reproductive life course including menstruation, avoiding pregnancy, pregnancy, childbirth, breastfeeding, and menopause. • Young women between the ages of 16 and 24 have higher risk of common mental health problems and higher rates of self-harm and post-traumatic stress disorder etc. • Bristol female preventable mortality rates are significantly higher than the England rates • Nationally 27% of women experience domestic abuse in their lifetimes. The rate of recorded domestic abuse incidents in Bristol has shown a significant rise over the last two years and 74% of victims were female. • Men and boy's health is in general poorer than that of women and girl's • Male life expectancy at birth in Bristol is around four years less than for females. • On average men in Bristol live 18 years in poor health, women live 22 years in poor health • A higher proportion of boys have physical impairments and more boys than girls have diagnosed mental health disorders and learning difficulties. • Men in Bristol are more likely than women to have unhealthy lifestyle behaviours including being overweight and obese, smoking, alcohol and substance misuse • There are differences between men and women in health practices and the way they use health services • Men are three times more likely than women to take their own lives. • The available data suggests that women are likely to be over-represented in service-users
Mitigations:	<p>See 'General Comments' above</p> <p>As part of this review, we will work with each individual to consider their needs and circumstances, including related to their gender. This could include working with care homes and care providers to ensure preference around gender of provider of personal care is considered and respected.</p>
Sexual orientation	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • Lesbian, gay and bisexual people are statistically more vulnerable to verbal and physical abuse • 1 in 5 Lesbian, Gay, Bisexual and Trans (LGBT) staff have been the target of negative comments or conduct from work colleagues in the last year because they're LGBT. • More than a third of LGBT staff have hidden or disguised that they're LGBT at work in the last year because they were afraid of discrimination.

	<ul style="list-style-type: none"> • 1 in 10 Black, Asian and Minority Ethnic LGBT staff have similarly been physically attacked because of their sexual orientation and /or gender identity, compared to 3% of White LGBT staff • One in four lesbian and bisexual women have experienced domestic abuse in a relationship, one third of them were abused by a man. Almost half of all gay and bisexual men have experienced at least one incident of domestic abuse from either a family member or a partner since the age of 16. • Research shows LGBT people face widespread discrimination in healthcare settings and one in seven LGBT people avoid seeking healthcare for fear of discrimination from staff • The Stonewall LGBT in Britain - Health Report shows LGBT people are at greater risk of marginalisation during health crises, and those with multiple marginalised identities can struggle even more. In communications we should signpost and refer where possible to mutual aid and community support networks². • Research has shown that LGBT people are more likely to be living with long-term health conditions, are more likely to smoke, and have higher rates of drug and alcohol use. • Half of LGBT people experienced depression in the last year • 14% of LGBT people have avoided treatment for fear of discrimination because they are LGBT.
Mitigations:	<p>See 'General Comments' above</p> <p>As part of this review, we will work with each individual to consider their individual needs and circumstances including related their sexual orientation. We will ensure that people are supported fairly and that their needs and preferences are considered. We will seek to fully involve individual in the assessment and support plan process.</p>
Pregnancy / Maternity	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • The Equality Act 2010 applies to those who are pregnant or have given birth in the past 26 weeks, as well as making provisions to protect the rights of breastfeeding mothers. • Around 80% of women will give birth and many women will also experience termination, miscarriage and stillbirth • In the workplace we need to ensure equal access to recruitment, personal development, promotion and retention for employees who are pregnant or on maternity leave (including briefing and updates for any workforce changes) • Ensure there is equality of opportunity for services in relation to pregnancy and maternity. This includes e.g. providing physical access when using prams and pushchairs, and availability of toilets and baby-changing facilities etc. , and flexible working patterns and service times for childcare arrangements • Women from minoritised ethnic backgrounds are more likely to experience complications at birth
Mitigations:	See 'General Comments' above
Gender reassignment	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • As sexual orientation above trans people are statistically more vulnerable to verbal and physical abuse. Trans people regularly face prejudice and discrimination because of the way in which they transgress many of the norms of our culture and society. • 1 in 8 trans people (12%) in the workplace have been physically attacked by customers or colleagues in the last year because they were trans
Mitigations:	See 'General Comments' above
Race	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>

<p>Potential impacts:</p>	<ul style="list-style-type: none"> • Ethnic minorities in Bristol experience greater disadvantage than in England and Wales as a whole in education and employment and this is particularly so for Black African people². • In the last census (2011) 16% of the population belonged to a Black, Asian or minority ethnic group and this is likely to be higher now. • The top three countries of birth outside UK for Bristol residents are Poland, Somalia and India. • Although the race or ethnicity pay gap has narrowed in recent years there are still wide pay differences between particular ethnic groups and most minority ethnic groups earn less on average than White British people. • Bangladeshi, Pakistani, and Black ethnic groups are more likely to live in deprived neighbourhoods; and the same groups and Chinese ethnicities are about twice as likely to live on a low income and experience child poverty compared to White groups • Black, Asian and minoritised ethnic households are less likely to own their home and more likely to living in overcrowded housing and intergenerational households. Bangladeshi and Pakistani groups are more likely to live in multi-family households. • Black people in the UK are less likely to hold a driving licence and more likely to rely on public transport. • Black, Asian and minority ethnic groups in Bristol are more likely to find inaccessible public transport prevents them from leaving their home when they want to • Black African young people are disadvantaged in education compared to their White peers³. A disproportionately high percentage of Bristol school pupils from Black, Asian and minority ethnic backgrounds are excluded from school and In Bristol pupils with the lowest 'Attainment 8' scores are from Black ethnic background (highest from Chinese ethnic background.) • Organisations may lack cultural competence because minoritised ethnic staff are under- represented. • People from Black African, Other, and Black Caribbean groups have persistently high levels of unemployment and almost all ethnic minority groups in Bristol experience employment inequality when compared to White British people. • Black Asian and other minoritised ethnic groups are more likely to be self-employed than the Bristol average and over-represented in low income self-employment including taxis, takeaway restaurants • People from minoritised ethnic backgrounds are underrepresented in political and civic leadership. • People who do not speak English as a main language may require information in plain English and community language translations or videos etc. • The available data suggests that black, Asian and minority ethnic people are likely to be over-represented in service-users of complex homecare when compared to the average receiving care •
<p>Mitigations:</p>	<p>See 'General Comments' above</p> <p>We will ensure that we work alongside people in a person-centred and strengths-based way and consider how their ethnicity may impact on the care and support they need or prefer. We will ensure that we work with Voluntary and Community Sector Organisation (VCSE) partners and care providers who focus on supporting people from Black, Asian and minoritised ethnic communities to ensure that we understand the needs of the communities they work with and are able to provide this. Where possible these reviews will be done jointly with appropriate clinician from health to ensure the health components of individuals aftercare needs are still being met.</p>

Religion or Belief	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • There are at least 45 religions represented in Bristol. Approximately 1 in 20 people in Bristol are Muslim, and Islam is the second religion in Bristol after Christianity • Budget proposals should take into account differing needs because of people's religion and belief (for example different requirements around diet, life events, and holidays) • Having a designated multi-faith room can make environments such as workplaces and shopping centres is more accessible and friendly for people from faith groups where regular prayer is required.
Mitigations:	See 'General Comments' above Each case will be considered on a case-by-case basis and a Social Worker will need to demonstrate that needs relating to religion will be considered as part of the review and work with providers to ensure that all identified needs are met. This might include ensuring that specific religious needs around accessing places of worship, appropriate dietary needs and proximity to those of opposite sex are considered and met as part of the reviewed support plan.
Marriage & civil partnership	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	
Mitigations:	
OTHER RELEVANT CHARACTERISTICS	
Socio-Economic (deprivation)	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • Bristol has 41 areas in the most deprived 10% in England, including 3 in the most deprived 1%. The greatest levels of deprivation are in Hartcliffe & Withywood, Filwood and Lawrence Hill. • In Bristol 15% of residents - 70,800 people - live in the 10% most deprived areas in England, including 19,000 children and 7,800 older people. • There are an estimated 29,045 households living in fuel poverty in Bristol, 14.4% of all households (BEIS, 2022) • 4.6% of households have experienced moderate to severe food insecurity, rising to 11.2% in the most deprived areas of the city (QoL 2021-22) • 34.6% of people in Bristol are dissatisfied with the way the Council runs things, but this is 47.5% for people living in the most deprived areas of the city (QoL 2021-22). • The inequalities gap in life expectancy between the most and least deprived areas in Bristol is 9.9 years for men and 6.7 years for women.
Mitigations:	See 'General Comments' above These factors will need to be considered at every review with each individual on case-by-case basis. As part of the reviews social workers will need to work with the individual, provider and their support network to ensure their income is maximised around welfare benefits, opportunities to access employment is promoted and access to good quality housing, primary health care, educational opportunities, meaningful occupation and health promotion options.
Carers	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • Being a carer can be a huge barrier to accessing services and maintaining employment • We need to consider the timing/availability of services, events etc. to allow flexibility for carers.

	<ul style="list-style-type: none"> • As with Disability and Pregnancy and Maternity – policies which aim to restrict driving or parking can have a disproportionate impact on people who are reliant on having their own transport. • Studies show around 65% of adults have provided unpaid care for a loved one. • Women have a 50% likelihood of being an unpaid carer by the age of 46 (by age 57 for men) • Young carers are often hidden and may not recognise themselves as carers.
Mitigations:	<p>See 'General Comments' above</p> <p>When carrying out annual care and support review, practitioners will ensure that where a carer is identified they are offered a carer's assessment, to ensure they are willing and able to continue in their caring role. They will also ensure that relevant carers support to enable them to sustain their role is explored and offered.</p>
Other groups [Please add additional rows below to detail the impact for any other relevant groups as appropriate e.g. asylum seekers and refugees; care experienced; homelessness; armed forces personnel and veterans]	
Potential impacts:	
Mitigations:	

3.2 Does the proposal create any benefits for people based on their protected or other relevant characteristics?

Outline any potential benefits of the proposal and how they can be maximised. Identify how the proposal will support our [Public Sector Equality Duty](#) to:

- ✓ Eliminate unlawful discrimination for a protected group
- ✓ Advance equality of opportunity between people who share a protected characteristic and those who don't
- ✓ Foster good relations between people who share a protected characteristic and those who don't

The specific benefit is that this work will increase the number and percentage of current individual's receiving care and support in the form of complex home care / direct payments who have received an annual review of their care and support needs. This will ensure these individuals care and support needs are being met enable us to promote independence and persons wellbeing. It will also enable Bristol City Council to ensure we are delivering best value for these individuals.

The scale of the potential gap in our core funding means that there is very limited opportunity to bring genuine additional benefit to equalities groups in the circumstances. However we have considered as far as possible the need to: eliminate discrimination, harassment, victimisation and any other conduct prohibited under the Equality Act 2010; advance equality of opportunity between people from different groups; and foster good relations between people from different groups.

Our budget savings proposals are aligned to our Corporate Strategy and although we have limited resources our future focus will be on achieving those priorities we have identified including tackling poverty and intergenerational inequality.

Step 4: Impact

4.1 How has the equality impact assessment informed or changed the proposal?

What are the main conclusions of this assessment? Use this section to provide an overview of your findings. This summary can be included in decision pathway reports etc.

If you have identified any significant negative impacts which cannot be mitigated, provide a justification showing how the proposal is proportionate, necessary, and appropriate despite this.

Summary of significant negative impacts and how they can be mitigated or justified:

People who draw on care and support services are more likely to be disproportionately impacted on the basis of disability and age, as well as other protected characteristics which may be over-represented in the cohort. It is therefore essential that we assess people individually, in a strengths-based way to ensure that people do not experience any negative impact of any reduction in support. We will address this through ensuring that we work alongside people when we undertake reviews with a strengths-based approach which considers the impact of any protected characteristics on their lives. All decisions regarding funding will be made on a person-centred basis, informed by a proper understanding of the specific needs of an individual and ensuring that individuals' Human Rights Act are not breached.

Summary of positive impacts / opportunities to promote the Public Sector Equality Duty:

By carrying out additional reviews of individuals with complex homecare, this will enable us to assure we are meeting 191 individuals care and support needs, promoting wellbeing and demonstrating best value for local authority resources.

4.2 Action Plan

Use this section to set out any actions you have identified to improve data, mitigate issues, or maximise opportunities etc. If an action is to meet the needs of a particular protected group please specify this.

Improvement / action required	Responsible Officer	Timescale
All relevant EqlAs will be published on the Council's website https://www.bristol.gov.uk/council-spending-performance/council-budgets and continue to be updated as appropriate.		
Additional Power BI reporting required to enable demographic and protected characteristics to be made available for this specific group of individuals.	Jamie Mahood	March 2024
Monitoring of outcomes for individual's once additional reviews have been undertaken to ensure needs of specific group continue to be met.	Jamie Mahood	April 2024

4.3 How will the impact of your proposal and actions be measured?

How will you know if you have been successful? Once the activity has been implemented this equality impact assessment should be periodically reviewed to make sure your changes have been effective your approach is still appropriate.


Our Equality and Inclusion Annual Progress Reports show what we have done to achieve the aims of our Equality and Inclusion policy and strategy, and the progress we have made including reporting on all relevant KPIs and workforce diversity [Equalities policy - bristol.gov.uk](https://www.bristol.gov.uk/equalities-policy)

We will monitor equalities data in relation to people who receive complex home care to ensure there is not any adverse impact on any particular group. This will include reviewing volume, outcome of reviews and impact on service users and wider workforce.

We will monitor the outcome of all the additional complex home care reviews to see what changes have been made to individual support plans, their personal budget and health provision.

Step 5: Review

The Equality and Inclusion Team need at least five working days to comment and feedback on your EqIA. EqIAs should only be marked as reviewed when they provide sufficient information for decision-makers on the equalities impact of the proposal. Please seek feedback and review from the [Equality and Inclusion Team](#) before requesting sign off from your Director¹.

Equality and Inclusion Team Review: <i>Reviewed by the Equality and Inclusion Team</i>	Director Sign-Off: 
Date: 10/01/2024	Date: 10/1/24

¹ Review by the Equality and Inclusion Team confirms there is sufficient analysis for decision makers to consider the likely equality impacts at this stage. This is not an endorsement or approval of the proposal.

Equality Impact Assessment [version 2.12]



Title: 2425 ASC – 2 Reducing Demand: Hospital Reviews	
<input type="checkbox"/> Policy <input type="checkbox"/> Strategy <input type="checkbox"/> Function <input type="checkbox"/> Service <input checked="" type="checkbox"/> Other [please state] <i>Savings Proposal</i>	<input checked="" type="checkbox"/> New <input type="checkbox"/> Already exists / review <input type="checkbox"/> Changing
Directorate: Adults and Communities	Lead Officer name: Mette Le Jakobsen
Service Area: Adult Social Care	Lead Officer role: Director: Adult Social Care

Step 1: What do we want to do?

The purpose of an Equality Impact Assessment is to assist decision makers in understanding the impact of proposals as part of their duties under the Equality Act 2010. Detailed guidance to support completion can be found here [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#).

This assessment should be started at the beginning of the process by someone with a good knowledge of the proposal and service area, and sufficient influence over the proposal. It is good practice to take a team approach to completing the equality impact assessment. Please contact the [Equality and Inclusion Team](#) early for advice and feedback.

1.1 What are the aims and objectives/purpose of this proposal?

Briefly explain the purpose of the proposal and why it is needed. Describe who it is aimed at and the intended aims / outcomes. Where known also summarise the key actions you plan to undertake. Please use plain English, avoiding jargon and acronyms. Equality Impact Assessments are viewed by a wide range of people including decision-makers and the wider public.

Budget context

Every year, Bristol City Council must agree an annual budget which balances the money we spend with the money we are expecting to receive. Councils across the country are continuing to face financial challenges, reflecting the economic context, including the significant inflationary environment, combined with continuing demand pressures and limitations on government funding. Based on our current forecasts, we face a funding gap over the next five years (to 2028/29) of £32.2 million. This is in addition to the £17.7 million of savings and efficiencies proposals for 2024-2028 outlined in the 2023/24 budget and assumed delivery of 2023/24 savings in the current year.

The Council has defined statutory responsibilities, but deliver against a far broader agenda, providing universal services benefiting the whole community, and targeted services aimed at individuals, communities with particular needs, and businesses – administered by our workforce, city partners, stakeholder organisations and commissioned services.

To address these challenges, we must look again across all of our services to find where we can do things differently to reduce costs, be more efficient in how we do things and, in some cases, stop doing some things entirely.

This proposal

Bristol City Council (BCC) commissioned a consultancy, PeopleToo in 2023 to conduct a diagnostic exercise. The purpose of the exercise was to assess whether individuals who are going on to bedded pathways following hospital admission continue to receive the appropriate support beyond discharge. Support beyond discharge could include reablement, rehab support at home, or a temporary placement in a bedded pathway. Bedded pathways are an integral part of the BNSSG 'Discharge to Assess' model of hospital discharge – [Discharge to Assess - BNSSG Healthier Together](#) – and individuals discharged to them are assessed by adult social care under the Care Act (2014) to determine their eligibility for onward care and support. If they receive such support, this is reviewed to ensure it remains appropriate to their needs, along with their independence being supported and promoted.

Following this review, BCC identified a series of opportunities that include:

- Having influence over the discharge pathway decision. Given the timescales, the plan is to conduct more frequent reviews of those coming out of hospital to ensure care is suitable
- Developing a matrix criteria for prioritising reviews Training will be coordinated with onboarding to ensure reviews identify eligible funding sources
- Performance tracking will be developed to monitor and track the impact of these reviews to review and adapt approach if required

This proposal comprises increasing the number of reviews carried out at six weeks following discharge from hospital. This will allow timely closure of care packages that are no longer needed and ensure care and support remains appropriate to need. Given the nature of the proposal, there is likely to be a higher proportion of older people affected. This is because people over 75 years of age are disproportionately represented in hospital admission figures. For example, in England in 2017 there were 16.6 million hospital admissions for people of any age. Of these, 3.5 million (22.2%) were amongst people aged 75 years and older, despite this age group only representing 8.2% of the population ([Older people's hospital admissions in the last year of life - GOV.UK \(www.gov.uk\)](http://www.gov.uk)). When carrying out reviews we will ensure that adult care staff consider needs on a case-by-case basis and ensure we promote wellbeing.

The performance targets for this programme are related to improved outcomes following hospital reviews, reducing packages. Additional staffing capacity will be sourced using a recruitment business partner to source up to 10 full-time social workers to carry out targeted reviews for people who have recently been discharged from hospital, alongside existing practitioners within the Citywide Reviewing Team. Staffing resource has been identified and we plan to begin onboarding new staff due, with a start date of January 2024.

Additional Locum staff will be funded through transformation budget and work closely alongside existing review teams using Social Work staff and managers. Additional managerial capacity has been identified to support this

1.2 Who will the proposal have the potential to affect?

<input checked="" type="checkbox"/> Bristol City Council workforce	<input checked="" type="checkbox"/> Service users	<input type="checkbox"/> The wider community
<input checked="" type="checkbox"/> Commissioned services	<input type="checkbox"/> City partners / Stakeholder organisations	
Additional comments:		

1.3 Will the proposal have an equality impact?

Could the proposal affect access levels of representation or participation in a service, or does it have the potential to change e.g. quality of life: health, education, or standard of living etc.?

If 'No' explain why you are sure there will be no equality impact, then skip steps 2-4 and request review by Equality and Inclusion Team.

If 'Yes' complete the rest of this assessment, or if you plan to complete the assessment at a later stage please state this clearly here and request review by the Equality and Inclusion Team.

<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	[please select]
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Those who received packages of care following a hospital admission, as defined by People Too workstreams, will be more likely to receive a reassessment of their care and support needs. This will better enable BCC to ensure it is compliant with Care and Support statutory guidance, that people's needs are being met and we are delivering best value.

Step 2: What information do we have?

2.1 What data or evidence is there which tells us who is, or could be affected?

Please use this section to demonstrate an understanding of who could be affected by the proposal. Include general population data where appropriate, and information about people who will be affected with particular reference to protected and other relevant characteristics: [How we measure equality and diversity \(bristol.gov.uk\)](https://www.bristol.gov.uk/equality-diversity)

Use one row for each evidence source and say which characteristic(s) it relates to. You can include a mix of qualitative and quantitative data e.g. from national or local research, available data or previous consultations and engagement activities.

Outline whether there is any over or under representation of equality groups within relevant services - don't forget to benchmark to the local population where appropriate. Links to available data and reports are here [Data, statistics and intelligence \(sharepoint.com\)](#). See also: [Bristol Open Data \(Quality of Life, Census etc.\)](#); [Joint Strategic Needs Assessment \(JSNA\)](#); [Ward Statistical Profiles](#).

For workforce / management of change proposals you will need to look at the diversity of the affected teams using available evidence such as [HR Analytics: Power BI Reports \(sharepoint.com\)](#) which shows the diversity profile of council teams and service areas. Identify any over or under-representation compared with Bristol economically active citizens for different characteristics. Additional sources of useful workforce evidence include the [Employee Staff Survey Report](#) and [Stress Risk Assessment](#)

Data / Evidence Source [Include a reference where known]	Summary of what this tells us
Census 2021	The Census details the demographic profile of Bristol.
The population of Bristol Bristol Key Facts 2022	Updated annually. The report brings together statistics on the current estimated population of Bristol, recent trends in population, future projections and looks at the key characteristics of the people living in Bristol. Population Profiles for Equalities Groups bring together detailed analysis looking at equalities groups and how they differ in relation to age, health, employment, education and housing, and maps the distribution of equalities groups across the city.
Ward profile data (bristol.gov.uk)	The Ward Profiles provide a range of data-sets, including population, life expectancy, health and education disparities etc. for each of Bristol's electoral wards.
Bristol Quality of Life Survey 2021-22	The Quality of Life (QoL) survey is an annual randomised sample survey of the Bristol population, mailed to 33,000 households (with online & paper options), and some additional targeting to boost numbers from low responding groups. In brief, the most recent QoL survey indicated that inequality and deprivation continue to affect people's experience in almost every element measured by the survey.

The [Quality of Life 2021/22 data dashboard](#) highlights those indicators, wards and equality and demographic groups which are better or worse than the Bristol average.

For example there are significant disparities based on people's characteristics and circumstances in the extent to which they find it difficult to manage financially:

Quality of Life Indicator	% who find it difficult to manage financially
16 to 24 years	12.5
50 years and older	6.7
65 years and older	3.2
Female	8.6
Male	8.5
Disabled	21.6
Asian /Asian British	9.9
Black/Black British	19.8
Mixed/Multiple Ethnicity	16.3
White British	7.8
White Minority Ethnic	8.4
Lesbian Gay or Bisexual	12.7
No Religion or Faith	8.0
Christian Religion	8.3
Other Religions	18.2
Carer	10.7
Full Time Carer	14.0
Part Time Carer	9.7
Single Parent	28.6
Two Parent	9.6
Parent (all)	12.0
No Qualifications	10.0
Non-Degree Qualified	12.9
Degree Qualified	6.7
Rented (Council)	20.3

Rented (HA)	20.6
Rented (Private)	14.6
Owner Occupier	4.6
Most Deprived 10%	18.8
Bristol Average	8.7

Joint Strategic Needs Assessment (JSNA)

The Joint Strategic Needs Assessment reports on the health and wellbeing needs of the people of Bristol. It brings together detailed information on local health and wellbeing needs and looks ahead at emerging challenges and projected future needs. The JSNA is used to provide a comprehensive picture of the health and wellbeing needs of Bristol (now and in the future); to inform decisions about how we design, commission and deliver services, and also about how the urban environment is planned and managed; to improve and protect health and wellbeing outcomes across the city while reducing health inequalities; and to provide partner organisations with information on the changing health and wellbeing needs of Bristol, at a local level, to support better service delivery.

[HR Analytics: Power BI reports \(sharepoint.com\)](#) [internal link only]

[Equality and Inclusion annual progress report 2021-22 \(bristol.gov.uk\)](#)

Appendix – Workforce Diversity Data – summary analysis

[Additional sources of useful workforce evidence include the Employee Staff Survey Report and Stress Risk Assessment Form completed by individuals and teams \[internal links only\]](#)

The Workforce Diversity Report shows Bristol City Council Workforce Diversity statistics for Headcount, Sickness, Starters and Leavers data. The report is updated once a month with data as at the end of the previous month. It excludes data for locally managed schools/nurseries, councillors, casual, seasonal and external agency employees. The report is based on the sensitive information that staff add to Employee Self Service on iTrent (ESS).

Summary of Bristol City Council workforce diversity

	BCC headcount % (31 Oct 2022)	Bristol Working Age Population (16-64)
Age 16-29	12.2%	39.0%
Age 30-39	22.0%	24.0%
Age 40-49	24.4%	16.0%
Age 50-64	41.4%	21.0%
Age 65+	3.4%	-
Disabled	9.0%	12%
Asian / Asian British	2.9%	5.8%
Black / Black British	5.1%	5.3%
Mixed ethnicity	3.6%	2.9%
Other ethnic groups	0.4%	1.0%
White	79.8%	85.0%

Female	60.1%	49.0%
Male	39.3%	51.0%
Use another gender term	0.2%	-
Christian	25.9%	43.5%
Other religion/belief	6.6%	7.3%
No religion/belief	41.9%	41.5%
Lesbian, Gay or Bisexual	5.9%	9.1%
Trans	0.1%	-

[Nomis - Official Labour Market Statistics \(nomisweb.co.uk\)](https://nomisweb.co.uk)
[Business demography, UK - Office for National Statistics \(ons.gov.uk\)](https://ons.gov.uk)

84% of all people in Bristol are economically active which is higher than nationally (78.6%) and in the South West (80.7%). Of economically active people in Bristol 6.9% are self-employed, compared to 9.5% nationally. Of those who are economically inactive in Bristol, 33% are Students, 29% are 'long-term sick' and 16% are looking after family/home, as well as 9.2% who are retired. The percentage of 'workless households' in Bristol is 12.1%, compared to 13.6% nationally, and the proportion of working age people who are benefit claimants is 11.2%. Bristol has a higher proportion of people working in 'professional occupations' (36.2) than for the South West (24.4%) and nationally (25.8%).

In 2020 (most recent data) the South West continued to have the highest five-year 'survival rate' in the UK of businesses that survived into 2020 (this has been the case since 2012). The largest proportion of these surviving businesses, 22%, was in the professional, scientific and technical industry.

[Bristol One City: Cost of Living Crisis – Bristol’s One City approach to supporting citizens and communities \(Oct 2022\)](#)

The rising cost of living is not impacting on everyone equally. People who are already experiencing inequity and poverty will be disproportionately impacted:

- **People on the lowest incomes** - will have less available income but also pay more for the same services. For example, people unable to pay their bills by Direct Debit and those borrowing money are subject to higher costs and interest rates. This is what anti-poverty campaign group Fair by Design has referred to as a Poverty Premium
- **Households with pre-payment energy meters** - households with pre-payment meters often pay above-average costs for their fuel. They will face a significant rise in their monthly bills in autumn and winter with increased energy usage as they do not benefit from the "smoothing" effect of Direct Debits, which spread usage costs evenly across the year
- **Parents and young families** – parents of young children are more likely to seek credit and alternative support as they are less able, on average, to afford an unexpected expense. Single parents will be

	<p>disproportionately affected; and one in four single parents find it difficult to manage financially (28.6%).</p> <ul style="list-style-type: none"> • Disabled people – just under half of all people in poverty in the UK are Disabled people or someone living with a Disabled person. Disabled people have higher living costs, and tend to pay more for their heating, travel, food/diet, prescription payments, and specialist equipment. It is estimated that UK households that include Disabled children pay on average £600 more for their energy bills than an average household • Black and Minoritised people – A higher proportion of Black and minoritised ethnic groups reported finding it difficult to manage financially (14.9%) in 2021. In 2020 the Social Metrics Commission found that almost half of people living in a family in the UK where the head of the household is Black are in poverty. Age UK report that poverty among older Black and minoritised ethnic groups is twice as high as for white pensioners • People in rented accommodation – it is estimated that 69% of low-income private renters in England will be forced to go without food and heating at least one day per week to meet rising housing and living cost. Almost three in ten homes in Bristol are privately rented • Underserved populations - It is likely that populations that are not typically well represented in data and research are likely to also face increased risk from rising cost of living. For example, refugees and asylum seekers, people experiencing homelessness, and Gypsy/Roma/Traveller groups.
<p><u>An evaluation of the Bristol Race Equality Covid-19 Steering Group</u></p> <p><u>Designing a new social reality - Research on the impact of covid-19 on Bristol's VCSE sector and what the future should be – Black South West Network 2020</u></p> <p><u>Delivering an inclusive economy post COVID-19</u></p>	<p>Report focusing on how co-production using a One City approach has been used to respond to the disproportionate impact of the Covid-19 pandemic on our marginalized ethnic communities.</p> <p>Local research has highlighted how long-term underinvestment and lack of equity in funding and procurement has eroded the local Voluntary and community sector.</p> <p>Our local partners have conducted research into the ongoing impact of COVID-19 for women and have provided recommendations on what service providers can do to reduce impact further impact.</p>
<p><u>Power BI reporting of individual's receiving a package of care following a hospital admission</u></p> <p>https://app.powerbi.com/groups/me/apps/0aa7863d-fb76-4b26-803a-eaac323e9a33/reports/cb91883a-59de-4ef3-8a2f-5ffa50d7d54e/ReportSectiond2b621c497cb53106386?ctid=6378a7a5-0f21-4482-ae0-897eb7de331f&experience=power-bi (internal link BCC only)</p>	<p>Given the way in which data is provided it is not possible to break down demographic breakdowns of this specific cohort without significant delay. We can however draw on wider demographic info of all individuals receiving packages of care who have recently been in hospital which should give</p>

a general indicator as to whether this intervention will more likely impact on individuals with protected characteristics.

Demographic data indicates that 44% of individuals receiving care at home are aged between 18 and 64 and 56% are over 65. This is compared against all individuals receiving any type of care and support 49.2% were aged under 65 and 50.8% over 65. This indicates that those receiving a package of care were more likely to be older.

More detailed age breakdown also supports narrative that people with home care or DP are older compared to everyone receiving care and support. 48.2% of those receiving a package of care are aged over 70 compared to 43% of everyone receiving care and support

Data appears to indicate that those impacted by this practice will be more likely to be female with 63% of individuals receiving a package of care and 37% male. This is compared to 54% female and 46% male for all individuals receiving care and support

In terms of ethnicity individual's receiving a package of care tend to be more diverse with 23.5% identifying as black, Asian or minoritised ethnic group compared to 18.25% of all individuals receiving all sorts of care. (NB 9% are reporting as don't know in both groups). 75.8% of total no. of people receiving care and support are white, whereas the figure for individuals just receiving a package of care is lower at 67%.

Whilst data on religion is incomplete (due to it being a non-mandatory field on the social care database), information available also supports the view that those receiving a package of care are more likely to come from a minority group as 20% identified as Muslim compared to 13% in the wider group. There did not appear to be any significant different between the two groups of individuals identifying as Christian (any denomination) 10% for both groups or no religion 4.4% for home care & DP and 4.3% for total group

Additional comments:

2.2 Do you currently monitor relevant activity by the following protected characteristics?

- | | | |
|--|--|--|
| <input checked="" type="checkbox"/> Age | <input checked="" type="checkbox"/> Disability | <input type="checkbox"/> Gender Reassignment |
| <input checked="" type="checkbox"/> Marriage and Civil Partnership | <input type="checkbox"/> Pregnancy/Maternity | <input type="checkbox"/> Race |
| <input type="checkbox"/> Religion or Belief | <input type="checkbox"/> Sex | <input type="checkbox"/> Sexual Orientation |

2.3 Are there any gaps in the evidence base?

Where there are gaps in the evidence, or you don't have enough information about some equality groups, include an equality action to find out in section 4.2 below. This doesn't mean that you can't complete the assessment without the information, but you need to follow up the action and if necessary, review the assessment later. If you are unable to fill in the gaps, then state this clearly with a justification.

For workforce related proposals all relevant characteristics may not be included in HR diversity reporting (e.g. pregnancy/maternity). For smaller teams diversity data may be redacted. A high proportion of not known/not disclosed may require an action to address under-reporting.

Due to the limitations of our available reporting on Power BI we are not able to give clear breakdown of exact characteristics of the individuals identified as having been in hospital recently and are now receiving a package of care. Existing data and insight team do not have the capacity to develop this report within available timeframe, but service-user data will be monitored throughout the process to address any impacts on protected characteristics.

Although our corporate approach is to collect diversity monitoring for all relevant characteristics, there are gaps in the available local diversity data for some characteristics, especially where this has not always historically been included in census and statutory reporting e.g. for sexual orientation. We also know there are some under-reporting gaps in our workforce diversity information - where personal and confidential information is voluntarily requested from staff. We also know there are some under-reporting gaps in our workforce diversity information - where personal and confidential information is voluntarily requested from staff. Our Power BI report currently only reports on sex, ethnicity, age and religion and does not report on gender reassignment or sexual orientation. We are updating our guidance and training offer for ASC to ensure greater compliance around asking for this information from our citizens.

In terms of future demand more information is required about makeup of adults who might approach adult care in the future requiring complex homecare, or those whose needs will increase and change to require that level of care. By working more closely with BNSSG ICB, and wider system partners this can help us to better predict future demand for this group.

2.4 How have you involved communities and groups that could be affected?

You will nearly always need to involve and consult with internal and external stakeholders during your assessment. The extent of the engagement will depend on the nature of the proposal or change. This should usually include individuals and groups representing different relevant protected characteristics. Please include details of any completed engagement and consultation and how representative this had been of Bristol's diverse communities.

Include the main findings of any engagement and consultation in Section 2.1 above.

If you are managing a workforce change process or restructure please refer to [Managing a change process or restructure \(sharepoint.com\)](#) for advice on consulting with employees etc. Relevant stakeholders for engagement about workforce changes may include e.g. staff-led groups and trades unions as well as affected staff.

We launched a public consultation on our budget proposals between 9th November and 21st December. This consultation set out all the savings proposals we had identified to produce a balanced budget in the context of reduced available funding and increasing financial pressures.

2.5 How will engagement with stakeholders continue?

Explain how you will continue to engage with stakeholders throughout the course of planning and delivery. Please describe where more engagement and consultation is required and set out how you intend to undertake it. Include

any targeted work to seek the views of under-represented groups. If you do not intend to undertake it, please set out your justification. You can ask the Equality and Inclusion Team for help in targeting particular groups.

All responses to the Budget Consultation will be analysed and included in the Council's Budget report that will be published on the Bristol City Council website in early 2024. We will take Budget consultation responses into account when developing this and other final proposals to put to the Cabinet and a meeting of the Full Council for approval. The final decision will be taken by Full Council at its budget setting meeting in February / March 2024.

Following the setting of the overall budget envelope there will be extensive engagement, consultation and co-design with affected communities on particular proposals which will inform future decision making prior to implementation. Our approach to public engagement and consultation will proactively target under-represented respondents to increase the participation of people from equality groups and their local representative organisations. This will help to ensure that our services and actions are informed by the views and needs of all our citizens.

We have discussed our proposals with existing operational teams who will be leading on these targeted reviews to ensure their practice expertise is taken on board when considering how to prioritise and approach these reviews.

Step 3: Who might the proposal impact?

Analysis of impacts must be rigorous. Please demonstrate your analysis of any impacts of the proposal in this section, referring to evidence you have gathered above and the characteristics protected by the Equality Act 2010. Also include details of existing issues for particular groups that you are aware of and are seeking to address or mitigate through this proposal. See detailed guidance documents for advice on identifying potential impacts etc. [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#)

3.1 Does the proposal have any potentially adverse impacts on people based on their protected or other relevant characteristics?

Consider sub-categories and how people with combined characteristics (e.g. young women) might have particular needs or experience particular kinds of disadvantage.

Where mitigations indicate a follow-on action, include this in the 'Action Plan' Section 4.2 below.

GENERAL COMMENTS (highlight any potential issues that might impact all or many groups)

Even when we plan to consult in more detail on specific service delivery proposals at a later time, we must ensure that any budget setting decisions that are likely to affect future services are informed by sufficient consultation and proper analysis. This is so that decision makers can have due regard to any likely disproportionate or negative impact on the basis of their protected and other relevant characteristics at the time the budget is approved – not afterwards¹.

Decision makers will have the ability to make changes to the individual spending plans following further consultation as appropriate and detailed evaluation of the impact of specific proposals. Within the proposed budget envelope there will be financial mitigation put aside for any non-delivery or amendments to proposals which may occur due to future consideration of equalities issues or other factors.

As well as identifying whether budget changes will have a disproportionate impact on particular groups (e.g., because they are over-represented in a particular cohort), we need to pay particular attention to the risk of indirect discrimination: when an apparently neutral decision puts members of a given group at a particular disadvantage compared with other people because of their different needs and circumstances.

We are also aware of existing structural inequalities and particular considerations, issues, and disparities for people in Bristol based on their characteristics, which we will take into account.

With all individuals who will receive annual care and support review as part of this project our social work staff will take an individualized, personalized, strength-based approach to carrying out these reviews, to ensure their voice and wishes are heard, and their identified outcomes met. We will also

<p>work closely with the provider and commissioners to ensure that care and support provided represents best value. for money.</p> <p>As part of this review, we will work with each individual to consider their individual needs and circumstances including related to their protected characteristics. We will ensure that people are supported fairly and that their needs and preferences are considered. We will seek to fully involve individual in the assessment and support plan process.</p>	
PROTECTED CHARACTERISTICS	
Age: Young People	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • Young people are often under-represented in engagement and consultation in Bristol and are less satisfied than average with the way the council runs things. • Children and young people in Bristol are considerably more ethnically diverse than the overall population of Bristol. • Children and young people from the most deprived areas of Bristol have the poorest outcomes in health and education in terms of health, education and future employment etc. • Young people in Bristol are more likely to: <ul style="list-style-type: none"> ○ have poor emotional health and wellbeing ○ find inaccessible public transport prevents them from leaving their home when they want to ○ 6.8% of 16-17 year olds (2020/21) were “not in education, employment or training” (NEET), worse than the national average (5.5%) <p>Young adults are most likely to have lost work or seen their income drop because of COVID-19 and the cost of living crisis</p>
Mitigations:	<p>See 'General Comments' above.</p> <p>We will be taking a strengths-based approach that will ensure that young people have a voice and are provided with different opportunities that maximise their well-being and independence. We will continue to apply the wellbeing principle as enshrined in 'The Care Act' when considering how we meet the needs of service users.</p> <p>Any decisions around meeting needs of younger Disabled people will need to ensure we consider their wellbeing and clearly evidence how any provision of care and support services promotes their wellbeing and doesn't impact on their Human Rights. Any decisions will be made on an individual, case by case basis.</p>
Age: Older People	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • Older people in Bristol are: <ul style="list-style-type: none"> ○ less likely to be comfortable using digital services ○ more reliant on public and community transport ○ more likely to be an unpaid carer ○ more likely to help out or volunteer in their community ○ less likely to have formal qualifications • Bristol Ageing Better estimated at least 11,000 older people are experiencing isolation in the city. • We must factor aging and the needs of older people into long term budgeting and service design
Mitigations:	<p>See 'General Comments' above</p> <p>Through taking a strengths-based approach to the way we work with people; we need to ensure that older people are in control of their care and support and are enabled to access alternative support options with any support they need. If we are using digital technology as an alternative way of providing support, we must ensure that this is appropriate and that they are enabled to use it safely and effectively and that it supports their independence. When carrying out reviews with older people in receipt of packages of care following a recent hospital admission, we will ensure that adult care staff consider needs on a case-by-case basis and ensure we promote wellbeing.</p>
Disability	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>

Potential impacts:	<ul style="list-style-type: none"> • 17% of Bristol’s population are disabled. There are more disabled women than men living in Bristol. • In 2021, the disability pay gap was 13.8% with disabled employees earning a median of £12.10 per hour and non-disabled employees a median of £14.03 per hour. • Disabled people are less likely to be employed in a managerial or professional occupation • the national disability employment rate was 52.7% in Q2 2021, compared to 81.0% for non-disabled people. • Disabled workers move out of work at nearly twice the rate (8.8%) of non-disabled workers (4.9%). Workless disabled people move into work at nearly one-third of the rate (11.0%) of workless non-disabled people (26.9%) • Disability increases with age: 4.1% of all children, for the working age population it increases to 12.3% and for people aged 65 and over it increases to 55.9%. • Disabled people on average have lower qualification levels than the population as a whole. • A higher proportion of disabled people rent from a social provider (local authority or housing association) • Disabled people have lower car ownership levels • Disabled people experience higher rates of hate crime and domestic abuse compared to the general population • Disabled people should be empowered to make independent living choices and have a say in access to service provision. • Budget setting needs to provide sufficient resource and flexibility to meet our legal duty to make anticipatory and responsive reasonable adjustments for disabled people including: <ul style="list-style-type: none"> ○ changing the way things are done e.g. opening / working times; ○ changes to overcome barriers created by the physical features of premises. ○ providing auxiliary aids e.g. extra equipment or a different or additional service. ○ is ‘anticipatory’ so we must think in advance and ongoing about what disabled people might reasonably need. • Disabled people must not be charged for their reasonable adjustments, accessible formats or other adaptations. It is a legal requirement under the Equalities Act to ensure information is accessible to disabled employees and service users.
Mitigations:	See 'General Comments' above We will ensure that people are supported fairly and that their needs and preferences are considered. We will seek to fully involve individual in the assessment and support plan process, if the individual requires, or is entitled to an advocate then we will ensure this is arranged. Where appropriate we will seek specialist input from a clinician or other allied health professional to support with the annual review.
Sex	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	
Mitigations:	
Sexual orientation	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	
Mitigations:	
Pregnancy / Maternity	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	
Mitigations:	

Gender reassignment	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	
Mitigations:	
Race	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • Ethnic minorities in Bristol experience greater disadvantage than in England and Wales as a whole in education and employment and this is particularly so for Black African people. • In the last census (2011) 16% of the population belonged to a Black, Asian or minority ethnic group and this is likely to be higher now. • The top three countries of birth outside UK for Bristol residents are Poland, Somalia and India. • Although the race or ethnicity pay gap has narrowed in recent years there are still wide pay differences between particular ethnic groups and most minority ethnic groups earn less on average than White British people. • Bangladeshi, Pakistani, and Black ethnic groups are more likely to live in deprived neighbourhoods; and the same groups and Chinese ethnicities are about twice as likely to live on a low income and experience child poverty compared to White groups • Black, Asian and minoritised ethnic households are less likely to own their home and more likely to living in overcrowded housing and intergenerational households. Bangladeshi and Pakistani groups are more likely to live in multi-family households. • Black people in the UK are less likely to hold a driving licence and more likely to rely on public transport. • Black, Asian and minority ethnic groups in Bristol are more likely to find inaccessible public transport prevents them from leaving their home when they want to • Black African young people are disadvantaged in education compared to their White peers⁸. A disproportionately high percentage of Bristol school pupils from Black, Asian and minority ethnic backgrounds are excluded from school and In Bristol pupils with the lowest 'Attainment 8' scores are from Black ethnic background (highest from Chinese ethnic background.) • Organisations may lack cultural competence because minoritised ethnic staff are under- represented. • People from Black African, Other, and Black Caribbean groups have persistently high levels of unemployment and almost all ethnic minority groups in Bristol experience employment inequality when compared to White British people. • Black Asian and other minoritised ethnic groups are more likely to be self-employed than the Bristol average and over-represented in low-income self-employment including taxis, takeaway restaurants • People from minoritised ethnic backgrounds are underrepresented in political and civic leadership. • People who do not speak English as a main language may require information in plain English and community language translations or videos etc.
Mitigations:	<p>See 'General Comments' above</p> <p>We will ensure that we work alongside people in a person-centred and strengths-based way and consider how their ethnicity may impact on the care and support they need or prefer. We will ensure that we work with Voluntary and Community Sector partners and care providers who focus on supporting people from Black, Asian and minoritised ethnic communities to ensure that we understand the needs of the communities they work with and are able to provide this. Where possible these reviews will be done</p>

	jointly with appropriate clinician from health to ensure the health components of individuals aftercare needs are still being met.
Religion or Belief	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	
Mitigations:	
Marriage & civil partnership	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	
Mitigations:	
OTHER RELEVANT CHARACTERISTICS	
Socio-Economic (deprivation)	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • Bristol has 41 areas in the most deprived 10% in England, including 3 in the most deprived 1%. The greatest levels of deprivation are in Hartcliffe & Withywood, Filwood and Lawrence Hill. • In Bristol 15% of residents - 70,800 people - live in the 10% most deprived areas in England, including 19,000 children and 7,800 older people. • There are an estimated 29,045 households living in fuel poverty in Bristol, 14.4% of all households (BEIS, 2022) • 4.6% of households have experienced moderate to severe food insecurity, rising to 11.2% in the most deprived areas of the city (QoL 2021-22) • 34.6% of people in Bristol are dissatisfied with the way the Council runs things, but this is 47.5% for people living in the most deprived areas of the city (QoL 2021-22). • The inequalities gap in life expectancy between the most and least deprived areas in Bristol is 9.9 years for men and 6.7 years for women.
Mitigations:	See 'General Comments' above These factors will need to be considered at every review with each individual on case-by-case basis. As part of the reviews social workers will need to work with the individual, provider and their support network to ensure their income is maximised around welfare benefits, opportunities to access employment is promoted and access to good quality housing, primary health care, educational opportunities, meaningful occupation and health promotion options.
Carers	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • Being a carer can be a huge barrier to accessing services and maintaining employment • We need to consider the timing/availability of services, events etc. to allow flexibility for carers. • As with Disability and Pregnancy and Maternity – policies which aim to restrict driving or parking can have a disproportionate impact on people who are reliant on having their own transport. • Studies show around 65% of adults have provided unpaid care for a loved one. • Women have a 50% likelihood of being an unpaid carer by the age of 46 (by age 57 for men) • Young carers are often hidden and may not recognise themselves as carers
Mitigations:	See 'General Comments' above When carrying out annual care and support review, practitioners will ensure that where a carer is identified they are offered a carer's assessment, to ensure they are willing and able to continue in their caring role. They will also ensure that relevant carers support to enable them to sustain their role is explored and offered.

Other groups [Please add additional rows below to detail the impact for any other relevant groups as appropriate e.g. asylum seekers and refugees; care experienced; homelessness; armed forces personnel and veterans]	
Potential impacts:	
Mitigations:	

3.2 Does the proposal create any benefits for people based on their protected or other relevant characteristics?

Outline any potential benefits of the proposal and how they can be maximised. Identify how the proposal will support our [Public Sector Equality Duty](#) to:

- ✓ Eliminate unlawful discrimination for a protected group
- ✓ Advance equality of opportunity between people who share a protected characteristic and those who don't
- ✓ Foster good relations between people who share a protected characteristic and those who don't

The specific benefit is that this work will increase the number and percentage of current individual's receiving care and support following a recent hospital admission who have received an annual review of their care and support needs. This will ensure these individuals care and support needs are being met enable us to promote independence and persons wellbeing. It will also enable Bristol City Council to ensure we are delivering best value for these individuals.

The scale of the potential gap in our core funding means that there is very limited opportunity to bring genuine additional benefit to equalities groups in the circumstances. However, we have considered as far as possible the need to: eliminate discrimination, harassment, victimisation and any other conduct prohibited under the Equality Act 2010; advance equality of opportunity between people from different groups; and foster good relations between people from different groups.

Our budget savings proposals are aligned to our Corporate Strategy and although we have limited resources our future focus will be on achieving those priorities we have identified including tackling poverty and intergenerational inequality.

Step 4: Impact

4.1 How has the equality impact assessment informed or changed the proposal?

What are the main conclusions of this assessment? Use this section to provide an overview of your findings. This summary can be included in decision pathway reports etc.

If you have identified any significant negative impacts which cannot be mitigated, provide a justification showing how the proposal is proportionate, necessary, and appropriate despite this.

Summary of significant negative impacts and how they can be mitigated or justified:
People who draw on care and support services are more likely to be disproportionately impacted on the basis of disability and age, as well as other protected characteristics which may be over-represented in the cohort. It is therefore essential that we assess people individually, in a strengths-based way to ensure that people do not experience any negative impact of any reduction in support. We will address this through ensuring that we work alongside people when we undertake reviews with a strengths-based approach which considers the impact of any protected characteristics on their lives. All decisions regarding funding will be made on a person-centred basis, informed by a proper understanding of the specific needs of an individual and ensuring that individuals' Human Rights Act are not breached.
Summary of positive impacts / opportunities to promote the Public Sector Equality Duty:
By carrying out these additional reviews of individuals who have recently been admitted to hospital, this will enable us to assure we are meeting these individuals care and support needs, promoting wellbeing and demonstrating best value for local authority resources.

4.2 Action Plan

Use this section to set out any actions you have identified to improve data, mitigate issues, or maximise opportunities etc. If an action is to meet the needs of a particular protected group please specify this.

Improvement / action required	Responsible Officer	Timescale
All relevant EqlAs will be published on the Council's website https://www.bristol.gov.uk/council-spending-performance/council-budgets and continue to be updated as appropriate.		

4.3 How will the impact of your proposal and actions be measured?

How will you know if you have been successful? Once the activity has been implemented this equality impact assessment should be periodically reviewed to make sure your changes have been effective your approach is still appropriate.

Our Equality and Inclusion Annual Progress Reports show what we have done to achieve the aims of our Equality and Inclusion policy and strategy, and the progress we have made including reporting on all relevant KPIs and workforce diversity [Equalities policy - bristol.gov.uk](https://www.bristol.gov.uk/equalities-policy)

Primary KPI:


The performance targets for this programme are related to improved outcomes following hospital reviews, reducing packages.

We will monitor equalities data in relation to people who receive reviews following hospital admission, to ensure there is not any adverse impact on any particular group. This will include reviewing volume, outcome of reviews and impact on service users and wider workforce.

We will monitor the outcome of all the additional reviews to see what changes have been made to individual support plans, their personal budget and health provision.

Step 5: Review

The Equality and Inclusion Team need at least five working days to comment and feedback on your EqlA. EqlAs should only be marked as reviewed when they provide sufficient information for decision-makers on the equalities impact of the proposal. Please seek feedback and review from the [Equality and Inclusion Team](#) before requesting sign off from your Director¹.

Equality and Inclusion Team Review: <i>Reviewed by the Equality and Inclusion Team</i>	Director Sign-Off: 
Date: 11/01/2023	Date: 11/1/24

¹ Review by the Equality and Inclusion Team confirms there is sufficient analysis for decision makers to consider the likely equality impacts at this stage. This is not an endorsement or approval of the proposal.

Equality Impact Assessment [version 2.12]



Title: 2425 ASC – 3 Residential Reviews Contract Management	
<input type="checkbox"/> Policy <input type="checkbox"/> Strategy <input type="checkbox"/> Function <input type="checkbox"/> Service <input checked="" type="checkbox"/> Other [please state] <i>Savings Proposal</i>	<input type="checkbox"/> New <input checked="" type="checkbox"/> Already exists / review <input type="checkbox"/> Changing
Directorate: Adults and Communities	Lead Officer name: Richard Hills
Service Area: Adult Social Care	Lead Officer role: Deputy Director - Commissioning

Step 1: What do we want to do?

The purpose of an Equality Impact Assessment is to assist decision makers in understanding the impact of proposals as part of their duties under the Equality Act 2010. Detailed guidance to support completion can be found here [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](https://sharepoint.com).

This assessment should be started at the beginning of the process by someone with a good knowledge of the proposal and service area, and sufficient influence over the proposal. It is good practice to take a team approach to completing the equality impact assessment. Please contact the Equality and Inclusion Team early for advice and feedback.

1.1 What are the aims and objectives/purpose of this proposal?

Briefly explain the purpose of the proposal and why it is needed. Describe who it is aimed at and the intended aims / outcomes. Where known also summarise the key actions you plan to undertake. Please use plain English, avoiding jargon and acronyms. Equality Impact Assessments are viewed by a wide range of people including decision-makers and the wider public.

Budget context

Every year, the council must agree an annual budget which balances the money we spend with the money we are expecting to receive. Councils across the country are continuing to face financial challenges and based on our current forecasts, we face a funding gap over the next five years (to 2028/29) of up to £81.2 million dependent on the severity of factors such as inflation, funding changes, and unavoidable service pressures. This is in addition to the £17.7 million of savings and efficiencies proposals for 2024-2028 outlined in the 2023/24 budget and assumed delivery of 2023/24 savings in the current year.

The Council has defined statutory responsibilities, but deliver against a far broader agenda, providing universal services benefiting the whole community, and targeted services aimed at individuals, communities with particular needs, and businesses – administered by our workforce, city partners, stakeholder organisations and commissioned services.

To address these challenges, we must look again across all of our services to find where we can do things differently to reduce costs, be more efficient in how we do things and, in some cases, stop doing some things entirely.

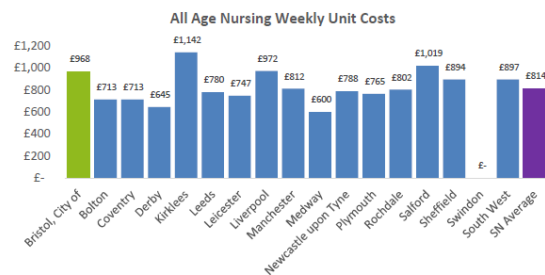
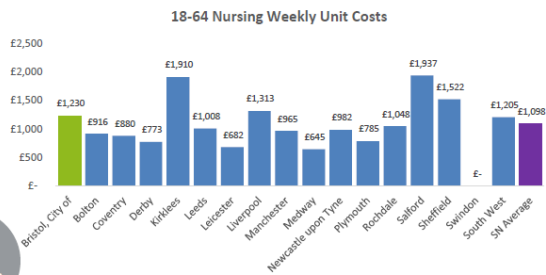
ASC Delivery Partner Diagnostic and Delivery

During June-August 2023, People too were commissioned as the Adult Social Care Delivery Partner to carry out a review of Bristol City Council’s Adult Social Care to measure current performance and develop proposals to reduce the budget overspend. The diagnostic found that there was an opportunity

to carry out targeted reviews of residential placements packages that sit above the Bristol City council Rates and contract manage these. There may be a requirement to review individuals in this process.

Nursing Care unit costs for all ages in Bristol are 19% higher than the Chartered Institute of Public Finance and Accountancy (CIPFA) group average and Residential Care unit costs for all ages in Bristol are 57% higher than the CIPFA group average.

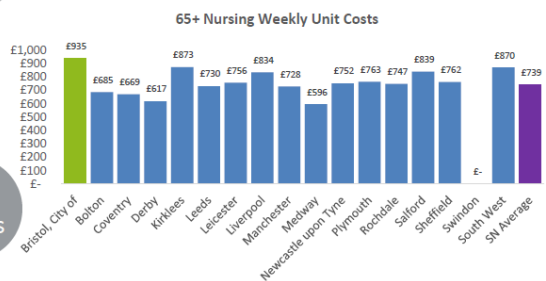
Unit Costs Benchmarking: Nursing Care



18-64 Adults

All Ages

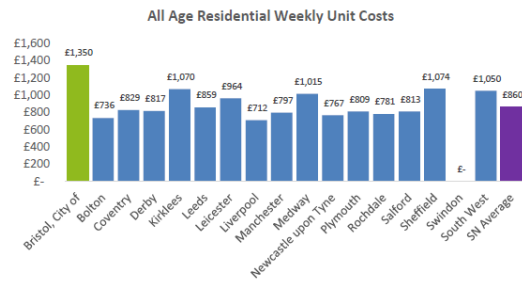
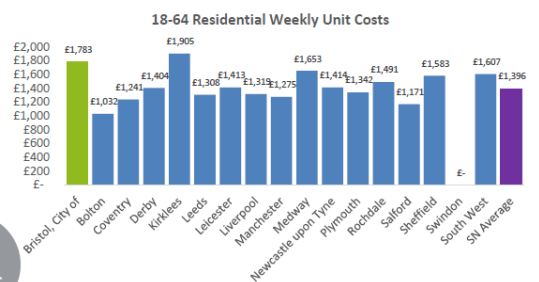
- Nursing Care Unit costs for all ages in Bristol are 19% higher than the CIPFA group average
- Reducing these unit costs will require us to develop understanding of local context including demand, placement decisions, market, workforce, and housing issues.



65+ Adults

7

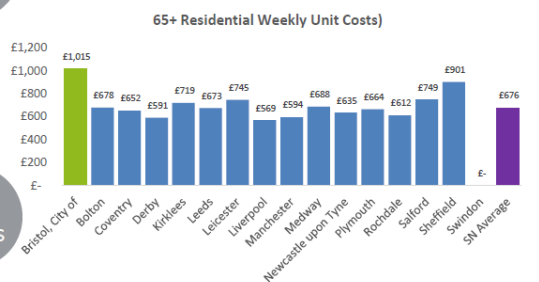
Unit Costs Benchmarking: Residential Care



18-64 Adults

All Ages

- Residential Care Unit costs for all ages in Bristol are 57% higher than the CIPFA group average
- Reducing these unit costs will require us to develop understanding of local context including demand, placement decisions, market, workforce, and housing issues.



65+ Adults

1.2 Who will the proposal have the potential to affect?

Bristol City Council workforce Service users The wider community

<input checked="" type="checkbox"/> Commissioned services	<input type="checkbox"/> City partners / Stakeholder organisations
Additional comments:	

1.3 Will the proposal have an equality impact?

Could the proposal affect access levels of representation or participation in a service, or does it have the potential to change e.g. quality of life: health, education, or standard of living etc.?

If 'No' explain why you are sure there will be no equality impact, then skip steps 2-4 and request review by Equality and Inclusion Team.

If 'Yes' complete the rest of this assessment, or if you plan to complete the assessment at a later stage please state this clearly here and request review by the Equality and Inclusion Team.

<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	[please select]
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The targeted reviews will allow for an increase in the review capacity which will ensure that the individual's needs are still being met and that the care and support services represent best value to Bristol City Council. The reviews may affect the delivery of services received by individuals as they could potentially change the delivery of care and support for individuals residing in the Residential and Nursing homes as well as the individuals who use those services in the future.

Step 2: What information do we have?

2.1 What data or evidence is there which tells us who is, or could be affected?

Please use this section to demonstrate an understanding of who could be affected by the proposal. Include general population data where appropriate, and information about people who will be affected with particular reference to protected and other relevant characteristics: [How we measure equality and diversity \(bristol.gov.uk\)](https://www.bristol.gov.uk/equality-diversity)

Use one row for each evidence source and say which characteristic(s) it relates to. You can include a mix of qualitative and quantitative data e.g. from national or local research, available data or previous consultations and engagement activities.

Outline whether there is any over or under representation of equality groups within relevant services - don't forget to benchmark to the local population where appropriate. Links to available data and reports are here [Data, statistics and intelligence \(sharepoint.com\)](#). See also: [Bristol Open Data \(Quality of Life, Census etc.\)](#); [Joint Strategic Needs Assessment \(JSNA\)](#); [Ward Statistical Profiles](#).

For workforce / management of change proposals you will need to look at the diversity of the affected teams using available evidence such as [HR Analytics: Power BI Reports \(sharepoint.com\)](#) which shows the diversity profile of council teams and service areas. Identify any over or under-representation compared with Bristol economically active citizens for different characteristics. Additional sources of useful workforce evidence include the [Employee Staff Survey Report](#) and [Stress Risk Assessment](#)

Data / Evidence Source [Include a reference where known]	Summary of what this tells us
<u>The population of Bristol</u>	Updated annually. The report brings together statistics on the current estimated population of Bristol, recent trends in population, future projections and looks at the key characteristics of the people living in Bristol.

<p><u>Bristol Key Facts 2022</u></p>	<p>Population Profiles for Equalities Groups bring together detailed analysis looking at equalities groups and how they differ in relation to age, health, employment, education and housing, and maps the distribution of equalities groups across the city.</p>
<p><u>Ward profile data (bristol.gov.uk)</u></p>	<p>The Ward Profiles provide a range of data-sets, including population, life expectancy, health and education disparities etc. for each of Bristol’s electoral wards.</p>
<p><u>Joint Strategic Needs Assessment (JSNA)</u></p>	<p>The Joint Strategic Needs Assessment reports on the health and wellbeing needs of the people of Bristol. It brings together detailed information on local health and wellbeing needs and looks ahead at emerging challenges and projected future needs. The JSNA is used to provide a comprehensive picture of the health and wellbeing needs of Bristol (now and in the future); to inform decisions about how we design, commission and deliver services, and also about how the urban environment is planned and managed; to improve and protect health and wellbeing outcomes across the city while reducing health inequalities; and to provide partner organisations with information on the changing health and wellbeing needs of Bristol, at a local level, to support better service delivery.</p>
<p><u>Bristol One City: Cost of Living Crisis – Bristol’s One City approach to supporting citizens and communities (Oct 2022)</u></p>	<p>The rising cost of living is not impacting on everyone equally. People who are already experiencing inequity and poverty will be disproportionately impacted:</p> <ul style="list-style-type: none"> • People on the lowest incomes - will have less available income but also pay more for the same services. For example, people unable to pay their bills by Direct Debit and those borrowing money are subject to higher costs and interest rates. This is what anti-poverty campaign group Fair by Design has referred to as a Poverty Premium • Households with pre-payment energy meters - households with pre-payment meters often pay above-average costs for their fuel. They will face a significant rise in their monthly bills in autumn and winter with increased energy usage as they do not benefit from the “smoothing” effect of Direct Debits, which spread usage costs evenly across the year • Parents and young families – parents of young children are more likely to seek credit and alternative support as they are less able, on average, to afford an unexpected expense. Single parents will be disproportionately affected; and one in four single parents find it difficult to manage financially (28.6%). • Disabled people – just under half of all people in poverty in the UK are Disabled people or someone living with a Disabled person. Disabled people may have higher living costs, and tend to pay more for their heating, travel, food/diet, prescription payments, and specialist equipment. It is estimated that UK households that include Disabled children pay on average £600 more for their energy bills than an average household • Black and Minoritised people – A higher proportion of Black and minoritised ethnic groups reported finding it difficult to manage financially (14.9%) in 2021. In 2020 the Social Metrics Commission found that almost half of people living in a family in the UK where the head of the household is Black are in poverty. Age UK report that poverty among older Black and minoritised ethnic groups is twice as high as for white pensioners • People in rented accommodation – it is estimated that 69% of low-income private renters in England will be forced to go without food and heating

at least one day per week to meet rising housing and living cost. Almost three in ten homes in Bristol are privately rented

- **Underserved populations** - It is likely that populations that are not typically well represented in data and research are likely to also face increased risk from rising cost of living. For example, refugees and asylum seekers, people experiencing homelessness, and Gypsy/Roma/Traveller groups.

An evaluation of the Bristol Race Equality Covid-19 Steering Group

Report focusing on how co-production using a One City approach has been used to respond to the disproportionate impact of the Covid-19 pandemic on our marginalized ethnic communities.

Designing a new social reality - Research on the impact of covid-19 on Bristol's VCSE sector and what the future should be – Black South West Network 2020

Local research has highlighted how long-term underinvestment and lack of equity in funding and procurement has eroded the local Voluntary and community sector.

Delivering an inclusive economy post COVID-19

Our local partners have conducted research into the ongoing impact of COVID-19 for women and have provided recommendations on what service providers can do to reduce impact further impact.

Power BI data on individuals using Residential services. Tier 3 activity and cost

There are currently **1,417** individuals who receive a commissioned residential (780) and nursing (637) placement. Nursing placements have reduced 4.9% since 12 months ago where 670 individuals were within a commissioned nursing placement. Residential placements have reduced 2.7% from 802 service users 12 months ago.

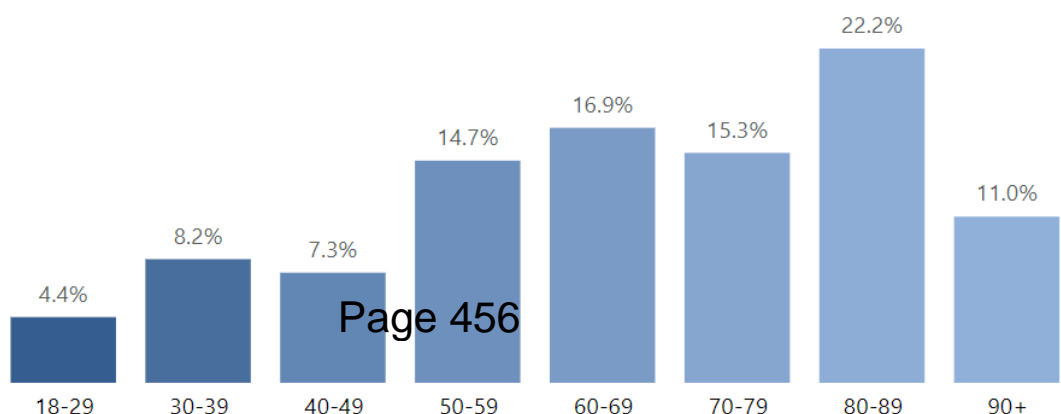
(internal link- [Power BI](#)).

Age

29% of individuals within current residential and nursing placements are under 65 and 71% are above 65 years of age.

Nursing

Percentage of Service Users by Age Band (darker is higher average weekly cost)



Residential

Gender

45% of individuals across Residential and Nursing services are male and 55% female. The below graphs show the split between residential (48.5% Male and 51.5% female) and Nursing (41.4% male and 58.6% female).

Residential

Service Users by Gender

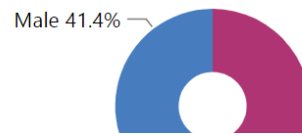
Gender... ● Female ● Male



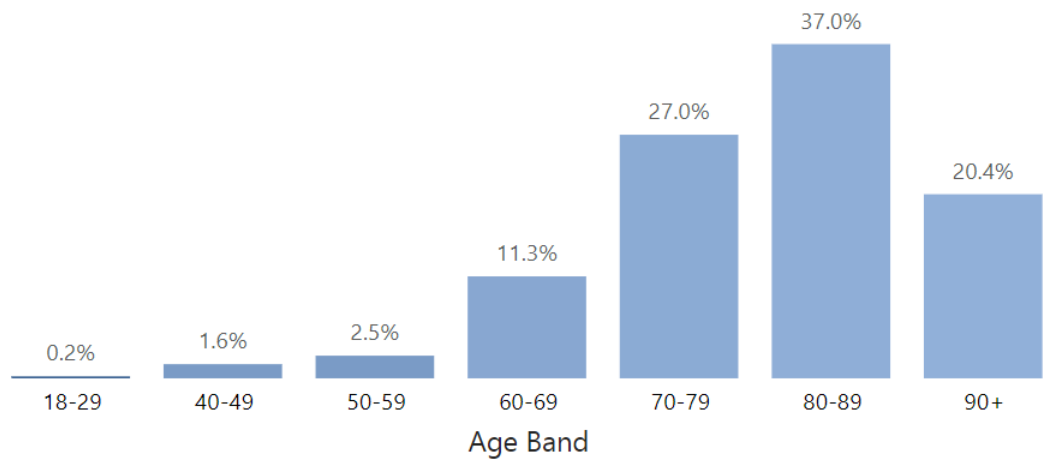
Nursing

Service Users by Gender

Gender... ● Female ● Male



Percentage of Service Users by Age Band (darker is higher average weekly cost)

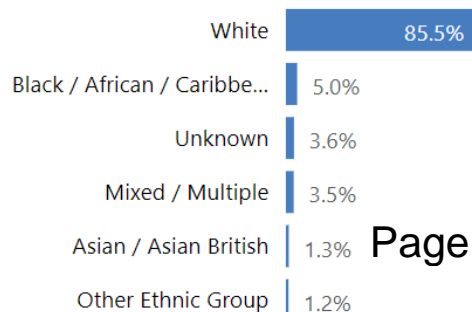


Ethnicity Group

85% of individuals are recorded as being from a White ethnic background with 11% recorded as being from black or minoritized ethnic groups. 4% is unknown. The below tables show the percentage of service users by ethnicity group broken down by residential or nursing services. There is not much disparity in ethnic groups in either type of service.

Residential

Percentage of Current Service Users by Ethnicity Group

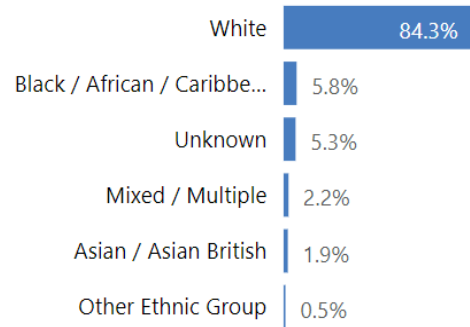


Nursing

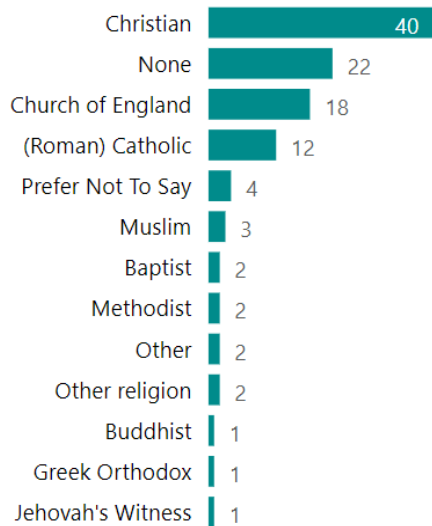
Religion

In Nursing services the highest number of service users report their religion as Church of England (52) with the number of Christian service users reported as 49 and 31 service users reporting no religion. In Residential services 40 of 780 service users reported their religion as Christian, 22 service users reported no religion and Church of England reported by 18 individuals. The below diagram shows the number of current service users across Residential and Nursing services by religion.

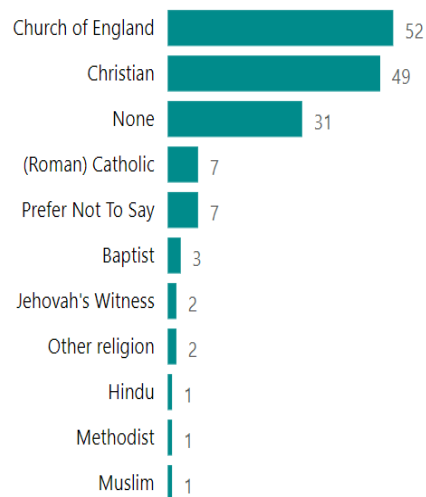
Percentage of Current Service Users by Ethnicity Group



Residential Services



Nursing Services

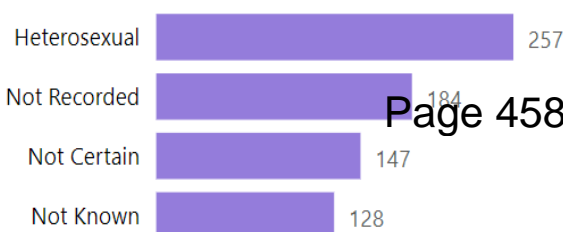


Sexual Orientation

Our data is lacking in respect to the sexual orientation of our service users in residential and nursing homes (1,417 service users). Whilst “heterosexual” is by far the most common sexual orientation for this cohort across residential and nursing (547 service users) the groups that follow in descending order are “not recorded” 401 service users, “not known” at 218 service users, “not certain” at 173 service users and “not disclosed” at 71 service users. Our data shows that 2 service users are recorded as “bisexual” and 3 service users are recorded as “gay man” and 1 service user is recorded as “lesbian”. The below tables show the Number of Service Users by Sexual Orientation broken down by Residential and Nursing.

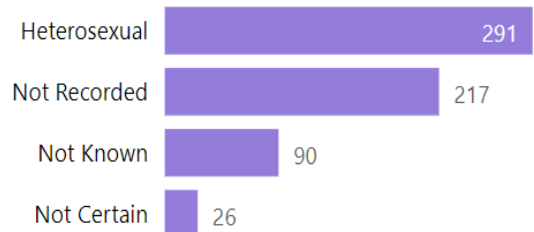
Residential

Number of Service Users by Sexual Orientation (where recorded)



Nursing

Number of Service Users by Sexual Orientation (where recorded)

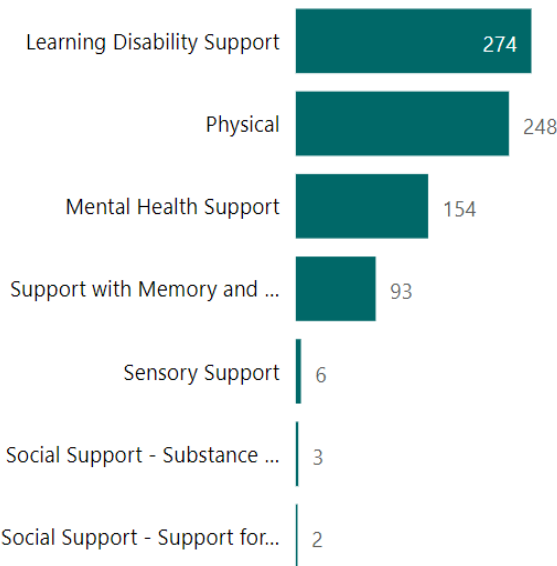


Primary Support Reason (PSR)

In Residential placements the top PSR is Learning Disability and Support, followed by Physical, followed by Mental Health Support. In Nursing placements, the top PSR is Physical, followed by Support with Memory and Cognition, followed by Mental Health Support. The below diagrams show the number of individuals by Primary support reason and client category for both residential and nursing services.

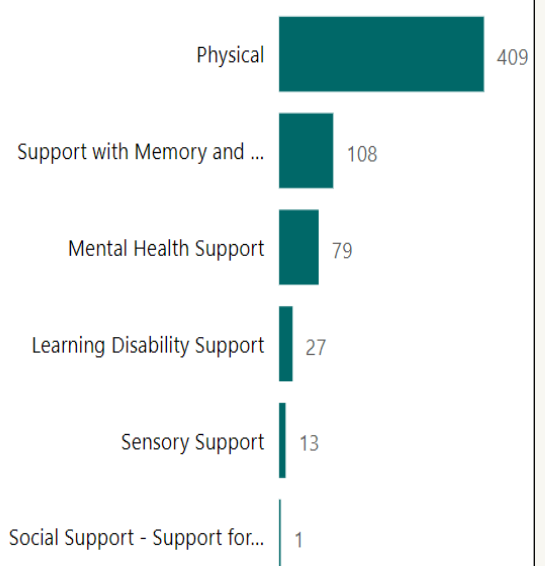
Residential

Number of Service Users Primary Support Reason (PSR)



Nursing

Number of Service Users Primary Support Reason (PSR)



Client Category

In Nursing services 37.8% of service users are in the 'Adults with Long Term Conditions' category, 54.6% of current service users are in the 'Older Persons' category, 7.38% are in the Unknown category, 2.74% of individuals are in the Carer category 0.16% are in the 'blank' category and 0.04% are in the 'Asylum' category.

67.2% of adults in residential services are in the 'Adults with Long Term Conditions' category, 29.1% of current service users are in the 'Older Persons' category and 3.72% are in the Unknown category.

Admissions into Residential and Nursing Services

In Residential placements admissions were highest for individuals of primary support reason and client group dementia (33.16% 64 individuals), physically frail/ temporarily ill (27.98% 54 individuals) and physical Disability (10.88% 21 individuals).

In Nursing placements admissions were highest for individuals of primary support reason and client group physically frail/ temporarily ill (36.61%, 108 individuals), dementia (24.41%, 72 individuals) and physical Disability (14.24%, 42 individuals).

**Brokerage
Supply and
Demand Report
Reporting
period
01/09/2023 -
31/09/2023**

16 individuals on the waiting list for residential or nursing Care Home placement. This has reduced from the 31 individuals waiting during the reporting period 01/08/2023 - 31/08/2023.

Waiting list by service requested:

Service Requested	No.
Nursing	7
Residential	2
Nursing Dementia	4
Residential Dementia	3
Total	16

5 individuals waiting over 30 days for placement.

Last 28 days:

	Total	P2/P3
Sourced	41	9
Referrals	32	11
Outstanding	17	3
With Offers	4	

Adults with Long Term Conditions (AWLTC) - specialist care homes

34 individuals on the waiting list for residential or nursing Care Home placement. This has increased from the 30 individuals waiting during the reporting period 01/08/2023 - 31/08/2023.

Current Location	No.
Acute Hospital	0
Care Home	16
Emergency acc/homeless	0
Home	1
Hosp Callington	2
Hospital	7
Other	4
Prison	0
Psychiatric Hospital	2
Supported Living	2
Total	34

Monthly Stats:

Monthly Stats	No.
Referrals	10
Sourced	7
Outstanding	34
Previous	30

Waiting List:

Time waiting	
over 3 months	10
over 6 months	3

Longest Waits:

1 individual waiting to be placed since November 2022.

2 individuals waiting to be placed since March 2023.

1 individual waiting to be placed since May 2023

2021 Census

Ethnicity:

In 1991 the Black, Asian and Minority Ethnic population accounted for 5.1% of the total population, this increased to 18.9% in 2021. In Bristol the largest minority ethnic groups in 2021 were Somali 9,167 (1.9%), Pakistani 9,103 (1.9%) and Indian 8,371 (1.8%).

Population:

Between 2011 and 2021 the population of Bristol increased by 10.3%, England and Wales saw a population increase of 6.3%. Bristol was the fastest growing of all the Core Cities in England and Wales over the last decade. There was an increase of 5.6% of children aged under 15, an increase of 11.8% of people aged 15 to 64 years and an increase of 8% in people aged 65 years and over. The median age of people living in Bristol is 32.4 years old in comparison to the England and Wales median of 40.3 years. Overall 49.6% of the overall population living in Bristol in 2021 were men and 50.4% of the population were female.

Religion:

In the 2021 census more than 45 religions were represented in Bristol with 51% of people stating they have no religion. This is the third highest proportion of people with no religion of all local authorities in England with Brighton, Hove and Norwich having a higher proportion of individuals with no religion. In England and Wales 37.2% of people have no religion. A third of people (32.2%) living in Bristol stated they were Christian. This is a lower proportion of the population than in England and Wales as a whole, where 46.2% are Christian. Muslims are the third largest religion in Bristol including 31,776 people, 6.7% of the population and similar to the England and Wales average of 6.5%. 2.8% (3,546 people) identify with other religions.

Main Language:

In Bristol 89.9% of usual residents aged three years and over had English as a main language (E&W 91.1%) down from 91.5% in 2011 (E&W 92.3% in 2011). Polish remained the most common main language in Bristol and nationally accounting for 1.5% of usual residents (E&W 1.1%). The other most common languages in Bristol include: Spanish 3,858, Somali 3,152, Romanian 3,063, Arabic 2,330 and Italian 2,180. All other languages have less than 2,000 people. Bristol Sign Language was the main language of 181 (0.04%) of people in Bristol (E&W 0.04%), an increase from 153 people in 2011.

Sexual Orientation:

23,649 people in Bristol identified with an LGB+ orientation, 6.1% of the population aged 16 and over (E&W average 3.2%). The local authority with the largest LGB+ population aged 16 year and over was Brighton and Hove (10.7%). Bristol was ranked

	<p>15th based on the overall size of the LGB+ population. Bristol was ranked 5th nationally after Manchester, Leeds, Birmingham and Brighton and Hove.</p> <p>Gender Identity: 3,220 people in Bristol indicated that their gender identity was different from their sex registered at birth, 0.83% of the population aged 16 and over. (E&W average of 0.54%). Based on the overall size of the Trans population Bristol was ranked 7th of the 10 local authorities with the largest proportion of the population (aged 16+) whose gender identity was different from their sex at birth.</p> <p>Health: In 2021 there was over 81,000 people living in Bristol with long-term physical or mental health conditions or illnesses whose day-to-day activities were limited. 17.2% of the total population had long-term physical or mental health conditions or illnesses which limited their day-to-day activities. (E&W 17.5%). This included:</p> <ul style="list-style-type: none"> - 6.1% of all children aged under 16 - 16.0% of the working age population - 38.5% of older people aged 65 and over <p>33,272 (7%) of the population had a long term physical or mental health condition but their day-to-day activities were not limited. In Bristol a third of all households (25.5%) included at least one person with long-term physical or mental health conditions or illnesses whose day-to-day activities are limited. (E&W 25.6%).</p>
<p>Additional comments:</p>	

2.2 Do you currently monitor relevant activity by the following protected characteristics?

<input checked="" type="checkbox"/> Age	<input checked="" type="checkbox"/> Disability	<input type="checkbox"/> Gender Reassignment
<input type="checkbox"/> Marriage and Civil Partnership	<input type="checkbox"/> Pregnancy/Maternity	<input checked="" type="checkbox"/> Race
<input checked="" type="checkbox"/> Religion or Belief	<input checked="" type="checkbox"/> Sex	<input checked="" type="checkbox"/> Sexual Orientation

2.3 Are there any gaps in the evidence base?

Where there are gaps in the evidence, or you don't have enough information about some equality groups, include an equality action to find out in section 4.2 below. This doesn't mean that you can't complete the assessment without the information, but you need to follow up the action and if necessary, review the assessment later. If you are unable to fill in the gaps, then state this clearly with a justification.

For workforce related proposals all relevant characteristics may not be included in HR diversity reporting (e.g. pregnancy/maternity). For smaller teams diversity data may be redacted. A high proportion of not known/not disclosed may require an action to address under-reporting.

Although our corporate approach is to collect diversity monitoring for all relevant characteristics, there are gaps in the available local diversity data for some characteristics, especially where this has not always historically been included in census and statutory reporting e.g. for sexual orientation. Therefore there is a significant lack of data on Race, Sexual Orientation, Disability (inc. diagnosis), Marital Status, Gender Reassignment, Religion and Pregnancy/ Maternity for our service users who access Residential and Nursing services at this point in time. This data is recorded via Bristol City Council 'LAS' systems and is input at various points throughout the care management process.

2.4 How have you involved communities and groups that could be affected?

You will nearly always need to involve and consult with internal and external stakeholders during your assessment. The extent of the engagement will depend on the nature of the proposal or change. This should usually include individuals and groups representing different relevant protected characteristics. Please include details of any completed engagement and consultation and how representative this had been of Bristol's diverse communities. Include the main findings of any engagement and consultation in Section 2.1 above.

If you are managing a workforce change process or restructure please refer to [Managing a change process or restructure \(sharepoint.com\)](#) for advice on consulting with employees etc. Relevant stakeholders for engagement about workforce changes may include e.g. staff-led groups and trades unions as well as affected staff.

Budget proposals public consultation was held between **Friday 11 November and Friday 23 December 2023**. This consultation set out all the savings proposals we had identified to produce a balanced budget in the context of reduced available funding and increasing financial pressures.

2.5 How will engagement with stakeholders continue?

Explain how you will continue to engage with stakeholders throughout the course of planning and delivery. Please describe where more engagement and consultation is required and set out how you intend to undertake it. Include any targeted work to seek the views of under-represented groups. If you do not intend to undertake it, please set out your justification. You can ask the Equality and Inclusion Team for help in targeting particular groups.

All responses to the Budget Consultation will be analysed and included in the Council's Budget report that will be published on the Bristol City Council website in early 2024. We will take Budget consultation responses into account when developing this and other final proposals to put to the Cabinet and a meeting of the Full Council for approval. The final decision will be taken by Full Council at its budget setting meeting in February / March 2024.

Following the setting of the overall budget envelope there will be extensive engagement, consultation, and co-design with affected communities on particular proposals which will inform future decision making prior to implementation. Our approach to public engagement and consultation will proactively target under-represented respondents to increase the participation of people from equality groups and their local representative organisations. This will help to ensure that our services and actions are informed by the views and needs of all our citizens.

During the consultation, an Easy Read version and a British Sign Language version of the consultation were available. <https://www.ask.bristol.gov.uk/budget-2024-25>

Step 3: Who might the proposal impact?

Analysis of impacts must be rigorous. Please demonstrate your analysis of any impacts of the proposal in this section, referring to evidence you have gathered above and the characteristics protected by the Equality Act 2010. Also include details of existing issues for particular groups that you are aware of and are seeking to address or mitigate through this proposal. See detailed guidance documents for advice on identifying potential impacts etc. [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#)

3.1 Does the proposal have any potentially adverse impacts on people based on their protected or other relevant characteristics?

Consider sub-categories and how people with combined characteristics (e.g. young women) might have particular needs or experience particular kinds of disadvantage.

Where mitigations indicate a follow-on action, include this in the 'Action Plan' Section 4.2 below.

GENERAL COMMENTS (highlight any potential issues that might impact all or many groups)

Even when we plan to consult in more detail on specific service delivery proposals later, we must ensure that any budget setting decisions that are likely to affect future services are informed by sufficient consultation and proper analysis. This is so that decision makers can have due regard to any likely disproportionate or negative impact based on their protected and other relevant characteristics at the time the budget is approved – not afterwards¹.

Decision makers will have the ability to make changes to the individual spending plans following further consultation as appropriate and detailed evaluation of the impact of specific proposals. Within the proposed budget envelope there will be financial mitigation put aside for any non-delivery or amendments to proposals which may occur due to future consideration of equalities issues or other factors.

As well as identifying whether budget changes will have a disproportionate impact on groups (e.g., because they are over-represented in a particular cohort), we need to pay particular attention to the risk of indirect discrimination: when an apparently neutral decision puts members of a given group at a particular disadvantage compared with other people because of their different needs and circumstances.

We are also aware of existing structural inequalities and particular considerations, issues, and disparities for people in Bristol based on their characteristics, which we will consider.

The review of Residential and Nursing services may impact those service users already within these services, such as older people and Disabled people with a Learning Disability if they have an individual review within the contract management process. Any changes may have an impact on future service users who may be referred and could impact individuals in areas where we are trying to build or increase market supply where there are currently gaps.

PROTECTED CHARACTERISTICS

Age: Young People	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	Evidence shows the number of younger people accessing Residential and Nursing services has risen, it is important that care and support services meet the needs of this cohort of people. Young people are often under-represented in engagement and consultation in Bristol and are less satisfied than average with the way the council runs things. Children and young people in Bristol are considerably more ethnically diverse than the overall population of Bristol.
Mitigations:	Analysis and engagement will look to understand and meet the needs of younger people within any future market development process and the new Adult social care single framework. Future designing of services will look to ensure that services meet the needs of young people.
Age: Older People	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	The majority of Residential and Nursing service users are aged 65+. Commissioned services must meet the needs of older adults with complex health and social care needs. Services must offer skilled interventions that promote people's independence and safety in older age. Bristol Ageing Better estimated at least 11,000 older people are experiencing isolation in the city. We must factor aging and the needs of older people into long term budgeting and service design
Mitigations:	Any recommissioning and service specs will look to ensure that services available are designed to meet the needs of older people that offer value for money, and that

	appropriate providers are commissioned to deliver these outcomes. Older people will be involved in the recommissioning consultation, including existing service users and future potential service users.
Disability	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<p>There is evidence of a significant level of Disabled people within Residential and Nursing services. It is important that Nursing and Residential care settings successfully meet the care and support needs of Disabled people.</p> <p>17% of Bristol's population are Disabled. There are more Disabled women than men living in Bristol.</p> <p>A higher proportion of disabled people rent from a social provider (local authority or housing association)</p> <p>Disability increases with age: 4.1% of all children, for the working age population it increases to 12.3% and for people aged 65 and over it increases to 55.9%.</p> <p>Disabled people should be empowered to make independent living choices and have a say in access to service provision.</p> <p>Budget setting needs to provide sufficient resource and flexibility to meet our legal duty to make anticipatory and responsive reasonable adjustments for Disabled people including:</p> <ul style="list-style-type: none"> • changing the way things are done e.g. opening / working times; • changes to overcome barriers created by the physical features of premises. • providing auxiliary aids e.g. extra equipment or a different or additional service. • is 'anticipatory' so we must think in advance and ongoing about what Disabled people might reasonably need. <p>Disabled people must not be charged for their reasonable adjustments, accessible formats or other adaptations. It is a legal requirement under the Equalities Act to ensure information is accessible to Disabled employees and service users.</p>
Mitigations:	Any recommissioning and service specs will look to ensure that services are designed to meet the needs of Disabled people and that appropriate providers are commissioned to deliver these outcomes. Future commissioning consultations will aim to get feedback from Disabled people, including existing service users.
Sex	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	
Mitigations:	
Sexual orientation	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	
Mitigations:	
Pregnancy / Maternity	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	
Mitigations:	
Gender reassignment	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	
Mitigations:	
Race	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	

Mitigations:	
Religion or Belief	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	
Mitigations:	
Marriage & civil partnership	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	
Mitigations:	
OTHER RELEVANT CHARACTERISTICS	
Socio-Economic (deprivation)	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	
Mitigations:	
Carers	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	
Mitigations:	
Other groups [Please add additional rows below to detail the impact for any other relevant groups as appropriate e.g. asylum seekers and refugees; care experienced; homelessness; armed forces personnel and veterans]	
Potential impacts:	
Mitigations:	

3.2 Does the proposal create any benefits for people based on their protected or other relevant characteristics?

Outline any potential benefits of the proposal and how they can be maximised. Identify how the proposal will support our [Public Sector Equality Duty](#) to:

- ✓ Eliminate unlawful discrimination for a protected group
- ✓ Advance equality of opportunity between people who share a protected characteristic and those who don't
- ✓ Foster good relations between people who share a protected characteristic and those who don't

The scale of the potential gap in our core funding means that there is very limited opportunity to bring genuine additional benefit to equalities groups in the circumstances. However we have considered as far as possible the need to: eliminate discrimination, harassment, victimisation, and any other conduct prohibited under the Equality Act 2010; advance equality of opportunity between people from different groups; and foster good relations between people from different groups.

Our budget savings proposals are aligned to our Corporate Strategy and although we have limited resources our future focus will be on achieving those priorities, we have identified including tackling poverty and intergenerational inequality.

The reviews will aid Adult Social Care at BCC to help improve service user outcomes, sufficiency of supply, quality, and cost effectiveness of Residential and Nursing services.

Step 4: Impact

4.1 How has the equality impact assessment informed or changed the proposal?

What are the main conclusions of this assessment? Use this section to provide an overview of your findings. This summary can be included in decision pathway reports etc.

If you have identified any significant negative impacts which cannot be mitigated, provide a justification showing how the proposal is proportionate, necessary, and appropriate despite this.

Summary of significant negative impacts and how they can be mitigated or justified:
The review of Nursing and Residential services could affect the accessibility and delivery of services for people currently in the services and those looking to access Residential and Nursing services in the future. To ensure the individuals receiving care remain protected through the process, the People Too team will be working alongside the BCC commissioning and MAT teams.
Summary of positive impacts / opportunities to promote the Public Sector Equality Duty:
Reviews will be carried out in a sensitive manner and may result in improved contract renegotiations going forwards and provide an opportunity to review additional high-cost cases across Residential and Nursing services. Lessons learned and analysis from this work will feed into work ongoing such as development and implementation of the ASC Single Framework to support more equal service delivery going forwards and contribute to equality of opportunity in supporting people to live independently.

4.2 Action Plan

Use this section to set out any actions you have identified to improve data, mitigate issues, or maximise opportunities etc. If an action is to meet the needs of a particular protected group please specify this.

Improvement / action required	Responsible Officer	Timescale
All relevant EqIAs will be published on the Council’s website https://www.bristol.gov.uk/council-spending-performance/council-budgets and continue to be updated as appropriate.		
To review the project scope and associated impacts throughout the reviews.	People Too/Commissioning	Midway in the project

4.3 How will the impact of your proposal and actions be measured?

How will you know if you have been successful? Once the activity has been implemented this equality impact assessment should be periodically reviewed to make sure your changes have been effective your approach is still appropriate.

Our Equality and Inclusion Annual Progress Reports show what we have done to achieve the aims of our Equality and Inclusion policy and strategy, and the progress we have made including reporting on all relevant KPIs and workforce diversity Equalities policy - bristol.gov.uk Revised service costs and new contracts will be agreed, and specific services will be delivered at lower cost. Individuals in these placements will continue to undergo annual reviews by BCC adult social care teams and any unforeseen impact will be addressed and fed back following those reviews.
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Step 5: Review

The Equality and Inclusion Team need at least five working days to comment and feedback on your EqIA. EqIAs should only be marked as reviewed when they provide sufficient information for decision-makers on the equalities impact of the proposal. Please seek feedback and review from the [Equality and Inclusion Team](#) before requesting sign off from your Director¹.

¹ Review by the Equality and Inclusion Team confirms there is sufficient analysis for decision makers to consider the likely equality impacts at this stage. This is not an endorsement or approval of the proposal.

Equality and Inclusion Team Review: <i>Reviewed by the Equality and Inclusion Team</i>	Director Sign-Off: <i>Richard Hills</i>
Date: 09/01/2023	Date: 11/01/2024

Equality Impact Assessment [version 2.12]



Title: 2425 ASC – 4 Transitions Contract Management and Income	
<input type="checkbox"/> Policy <input type="checkbox"/> Strategy <input type="checkbox"/> Function <input type="checkbox"/> Service	<input checked="" type="checkbox"/> New
<input checked="" type="checkbox"/> Other [please state] <i>Savings Proposal</i>	<input type="checkbox"/> Already exists / review <input type="checkbox"/> Changing
Directorate: Adults and Communities	Lead Officer name: Richard Hills
Service Area: Adult Social Care	Lead Officer role: Deputy Director - Commissioning

Step 1: What do we want to do?

The purpose of an Equality Impact Assessment is to assist decision makers in understanding the impact of proposals as part of their duties under the Equality Act 2010. Detailed guidance to support completion can be found here [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](https://sharepoint.com).

This assessment should be started at the beginning of the process by someone with a good knowledge of the proposal and service area, and sufficient influence over the proposal. It is good practice to take a team approach to completing the equality impact assessment. Please contact the [Equality and Inclusion Team](#) early for advice and feedback.

1.1 What are the aims and objectives/purpose of this proposal?

Briefly explain the purpose of the proposal and why it is needed. Describe who it is aimed at and the intended aims / outcomes. Where known also summarise the key actions you plan to undertake. Please use plain English, avoiding jargon and acronyms. Equality Impact Assessments are viewed by a wide range of people including decision-makers and the wider public.

Budget context

Every year, the council must agree an annual budget which balances the money we spend with the money we are expecting to receive. Councils across the country are continuing to face financial challenges and based on our current forecasts, we face a funding gap over the next five years (to 2028/29) of up to £81.2 million dependent on the severity of factors such as inflation, funding changes, and unavoidable service pressures. This is in addition to the £17.7 million of savings and efficiencies proposals for 2024-2028 outlined in the 2023/24 budget and assumed delivery of 2023/24 savings in the current year.

The Council has defined statutory responsibilities, but deliver against a far broader agenda, providing universal services benefiting the whole community, and targeted services aimed at individuals, communities with particular needs, and businesses – administered by our workforce, city partners, stakeholder organisations and commissioned services.

To address these challenges, we must look again across all of our services to find where we can do things differently to reduce costs, be more efficient in how we do things and, in some cases, stop doing some things entirely.

As noted in People Scrutiny Report- Transitions ¹ [Bristol City Council \(BCC\)](#) have a shortfall of good local provision to support young people with complex needs in adult social care so people often get placed out of area (e.g any placement that is outside of Bristol local authority) and placements tend to be twice as expensive as local placements, resulting in a small number of contracts (18) creating a significant funding pressure.

BCC commissioned a consultancy called People Too in 2023 to conduct a desktop exercise of high-cost placements and identified 18 contracts that relate to some young people who have transitioned to adult social care and are currently in high-cost placements. People Too have now been commissioned to carry out the 18

contract reviews identified, between October 2023- March 2024 for service delivery, charging rates and health funding contributions. The aim of the review is to:

- assess the current contract costs and confirm that these are meeting the individual needs identified.
- To confirm if the needs have a higher level of health needs than originally identified.
- Discuss costs with suppliers and ICBS in those areas to negotiate the fair and appropriate contribution from BCC thus delivering savings.

1.2 Who will the proposal have the potential to affect?

<input type="checkbox"/> Bristol City Council workforce	<input type="checkbox"/> Service users	<input type="checkbox"/> The wider community
<input checked="" type="checkbox"/> Commissioned services	<input type="checkbox"/> City partners / Stakeholder organisations	
Additional comments:		

1.3 Will the proposal have an equality impact?

Could the proposal affect access levels of representation or participation in a service, or does it have the potential to change e.g. quality of life: health, education, or standard of living etc.?

If 'No' explain why you are sure there will be no equality impact, then skip steps 2-4 and request review by Equality and Inclusion Team.

If 'Yes' complete the rest of this assessment, or if you plan to complete the assessment at a later stage, please state this clearly here and request review by the Equality and Inclusion Team.

<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	[please select]
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The proposed work by People Too will be a renegotiation of contracts and costs associated with 18 young people who have been identified with the highest cost of service.

The review will take place with the provider and will include gaining a level of insight into the placement content, whether the provider is delivering the expectations outlined in contractual documentation and assess whether it has changed, as these matters influence the cost of the placement. The primary purpose of this work is to assess if BCC is only paying for what is being delivered and to ensure there is a fair and appropriate payment for services being delivered to meet the young person's needs.

There is no intention of reviewing the young person's needs so if there is no review, there will be no change to placement or provision for the young person as a result of the cost negotiations. Therefore, there is no direct impact for the young person in placement or their families/carers as changes are contractual and not related to the care being received by the individual. BCC will work with suppliers to ensure quality care is delivered.

The proposal only impacts costs of service charged by providers and should not impact any service users or cause any change in service delivery.

However, it is noted that the 18 young people are in a significantly high vulnerability group, being both young people transitioning to adulthood and also with complex learning or physical needs resulting in complex and high-cost care packages. To ensure the individuals receiving care remain protected through the process, the People Too team will be working alongside BCC commissioning team. For the work scoped that this EQIA supports, therefore there is no impact on any people who receive support services.

Review of this nature carried out in a sensitive manner with guidance from the commissioning team, may result in improved contract renegotiations going forwards and provide an opportunity to review additional high-cost cases both within the 18-24 years cohort and other age groups. Lessons learned and analysis from this piece of work will feed into the transitions project and other council work to support more equal service delivery going forwards.

Service costs and new contracts will be agreed, and specific packages of care will be delivered at lower cost with no impact or change to service delivery. The individuals in these placements will continue to undergo annual

reviews by BCC adult social care teams and any unforeseen impact will be addressed and feedback following those reviews.

Step 5: Review

The Equality and Inclusion Team need at least five working days to comment and feedback on your EqIA. EqIAs should only be marked as reviewed when they provide sufficient information for decision-makers on the equalities impact of the proposal. Please seek feedback and review from the [Equality and Inclusion Team](#) before requesting sign off from your Director².

Equality and Inclusion Team Review: <i>Reviewed by Equality and Inclusion Team</i>	Director Sign-Off: <i>Richard Hills</i>
Date: 5/1/2024	Date: 8 th Jan 2024

² Review by the Equality and Inclusion Team confirms there is sufficient analysis for decision makers to consider the likely equality impacts at this stage. This is not an endorsement or approval of the proposal.

Equality Impact Assessment [version 2.10]



Title: GAP22 Legacy Supporting People Review	
<input checked="" type="checkbox"/> Budget Proposal	<input checked="" type="checkbox"/> New <input type="checkbox"/> Already exists / review <input type="checkbox"/> Changing
Directorate: Adults and communities	Lead Officer name: Richard Hills
Service Area: Adult Social Care	Lead officer role: Deputy Director – commissioning

Step 1: What do we want to do?

The purpose of an Equality Impact Assessment is to assist decision makers in understanding the impact of proposals as part of their duties under the Equality Act 2010. Detailed guidance to support completion can be found here [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#).

This assessment should be started at the beginning of the process by someone with a good knowledge of the proposal and service area, and sufficient influence over the proposal. It is good practice to take a team approach to completing the equality impact assessment. Please contact the [Equality and Inclusion Team](#) early for advice and feedback.

1.1 What are the aims and objectives/purpose of this proposal?

Briefly explain the purpose of the proposal and why it is needed. Describe who it is aimed at and the intended aims / outcomes. Where known also summarise the key actions you plan to undertake. Please use [plain English](#), avoiding jargon and acronyms. Equality Impact Assessments are viewed by a wide range of people including decision-makers and the wider public.

Budget context

Every year, Bristol City Council must agree an annual budget which balances the money we spend with the money we are expecting to receive. Councils across the country are continuing to face financial challenges, reflecting the economic context, including the significant inflationary environment, combined with continuing demand pressures and limitations on government funding. Based on our current forecasts, we face a funding gap over the next five years (to 2028/29) of £32.2 million. This is in addition to the £17.7 million of savings and efficiencies proposals for 2024-2028 outlined in the 2023/24 budget and assumed delivery of 2023/24 savings in the current year.

The Council has defined statutory responsibilities, but deliver against a far broader agenda, providing universal services benefiting the whole community, and targeted services aimed at individuals, communities with particular needs, and businesses – administered by our workforce, city partners, stakeholder organisations and commissioned services.

To address these challenges, we are looking across all of our services with a focus on:

- maximising our transformation programmes – where we are looking to improve services whilst achieving the best value for money
- income opportunities – where we are looking to improve our external income and most effectively apply that income
- targeted reviews – where we are looking at services that are comparatively high in cost compared to other councils to see where we can do things differently to reduce costs, be more efficient in how we do things and, in some cases, stop doing some things entirely.

This proposal

Adult Care used Supporting People funding to provide low level, housing related support such as general wellbeing, low level mental health, and general tenancy support. This was designed to help people stay living independently in their homes and was a non-statutory provision. Supporting People funding ended, and it was agreed that the council would continue to fund these services but, as people had Care Act assessments, it would be decided whether the service:

- moves to a Community Support Service-commissioned service;
- is ended,
- or needs are met by other services.

There is the potential that Supporting People services, a non-chargeable service will become a chargeable Adult Care services. The mitigations will be that a full Care Act assessment will be completed to look at options and financial assessment to ensure any charges are fair.

By undertaking Care Act eligibility assessments for people who receive this service, we would ensure that we maintain support for those who are eligible in line with the Care Act 2014. The savings project is to employ additional social workers to complete the Care Act assessments and it is anticipated that some of these assessments would result in people not being eligible for a council-funded service so the service would either (a) end or (b) look to be delivered by a voluntary / non-funded provision. Where possible, we will signpost to other mechanisms of support and all Care assessments will support people based on their protected and other characteristics.

There are around 78 people in this cohort, the average age being 57, with a high proportion of males. 34% of service users have a primary support reason of learning disability (34%) with 35% of that being mental health. In recent years there has been a large underspend within this service with numbers of service-users decreasing annually. This is largely because support needs are being met elsewhere, therefore, it was decided that the cohort should receive a review to ensure that service-users are receiving the most appropriate support. However, due to the nature of the proposal there is likely to be a disproportionate, negative impact on Disabled people and men as they are over-represented in the cohort. All decisions regarding funding will be made on a person-centred basis, informed by a proper understanding of the specific needs of an individual and ensuring that individuals' Human Rights Act are not breached.

1.2 Who will the proposal have the potential to affect?

<input type="checkbox"/> Bristol City Council workforce	<input checked="" type="checkbox"/> Service users	<input type="checkbox"/> The wider community
<input type="checkbox"/> Commissioned services	<input type="checkbox"/> City partners / Stakeholder organisations	
Additional comments:		

1.3 Will the proposal have an equality impact?

<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	[please select]
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Could the proposal affect access levels of representation or participation in a service, or does it have the potential to change e.g. quality of life: health, education, or standard of living etc.?

If 'No' explain why you are sure there will be no equality impact, then skip steps 2-4 and request review by Equality and Inclusion Team.

If 'Yes' complete the rest of this assessment, or if you plan to complete the assessment at a later stage please state this clearly here and request review by the Equality and Inclusion Team.

Step 2: What information do we have?

2.1 What data or evidence is there which tells us who is, or could be affected?

Please use this section to demonstrate an understanding of who could be affected by the proposal. Include general population data where appropriate, and information about people who will be affected with particular reference to protected and other relevant characteristics: [How we measure equality and diversity \(bristol.gov.uk\)](https://www.bristol.gov.uk/equality-and-diversity)

Use one row for each evidence source and say which characteristic(s) it relates to. You can include a mix of qualitative and quantitative data e.g. from national or local research, available data or previous consultations and engagement activities.

Outline whether there is any over or under representation of equality groups within relevant services - don't forget to benchmark to the local population where appropriate. Links to available data and reports are here [Data, statistics and intelligence \(sharepoint.com\)](#). See also: [Bristol Open Data \(Quality of Life, Census etc.\)](#); [Joint Strategic Needs Assessment \(JSNA\)](#); [Ward Statistical Profiles](#).

For workforce / management of change proposals you will need to look at the diversity of the affected teams using available evidence such as [HR Analytics: Power BI Reports \(sharepoint.com\)](#) which shows the diversity profile of council teams and service areas. Identify any over or under-representation compared with Bristol economically active citizens for different characteristics. Additional sources of useful workforce evidence include the [Employee Staff Survey Report](#) and [Stress Risk Assessment Form](#)

Data / Evidence Source [Include a reference where known]	Summary of what this tells us
Census 2021	The Census details the demographic profile of Bristol.
The population of Bristol Bristol Key Facts 2022	Updated annually. The report brings together statistics on the current estimated population of Bristol, recent trends in population, future projections and looks at the key characteristics of the people living in Bristol. Population Profiles for Equalities Groups bring together detailed analysis looking at equalities groups and how they differ in relation to age, health, employment, education and housing, and maps the distribution of equalities groups across the city.
Ward profile data (bristol.gov.uk)	The Ward Profiles provide a range of data-sets, including population, life expectancy, health and education disparities etc. for each of Bristol's electoral wards.
Joint Strategic Needs Assessment (JSNA)	The Joint Strategic Needs Assessment reports on the health and wellbeing needs of the people of Bristol. It brings together detailed information on local health and wellbeing needs and

	<p>looks ahead at emerging challenges and projected future needs. The JSNA is used to provide a comprehensive picture of the health and wellbeing needs of Bristol (now and in the future); to inform decisions about how we design, commission and deliver services, and also about how the urban environment is planned and managed; to improve and protect health and wellbeing outcomes across the city while reducing health inequalities; and to provide partner organisations with information on the changing health and wellbeing needs of Bristol, at a local level, to support better service delivery.</p>
<p>Liquidlogic Adult Social (LAS) Care Database (internal link only)</p>	<p>We have data on LAS Adult Care (internal only) Database on 67 of the 78 people currently in this cohort. Data shows that</p> <ul style="list-style-type: none"> • The average age is 57 and ages range from 26 to 85. 28% are over 65 years old. • 37% are female and 63% are male. • 73% are White British, 8% dual /mixed 5% African 5% Caribbean 3% Bangladeshi 1% Eastern Europe, Indian, White Irish • 34% have a primary support reason as Learning Disability • 35% is Mental Health (26% not known yet) • Of current addresses 30% are BS6 (Redland), 23% are BS16 (Fishponds) and 16% are BS8 (Clifton)

2.2 Do you currently monitor relevant activity by the following protected characteristics?

<input type="checkbox"/> Age	<input type="checkbox"/> Disability	<input type="checkbox"/> Gender Reassignment
<input type="checkbox"/> Marriage and Civil Partnership	<input type="checkbox"/> Pregnancy/Maternity	<input type="checkbox"/> Race
<input type="checkbox"/> Religion or Belief	<input type="checkbox"/> Sex	<input type="checkbox"/> Sexual Orientation

2.3 Are there any gaps in the evidence base?

Where there are gaps in the evidence, or you don't have enough information about some equality groups, include an equality action to find out in section 4.2 below. This doesn't mean that you can't complete the assessment without the information, but you need to follow up the action and if necessary, review the assessment later. If you are unable to fill in the gaps, then state this clearly with a justification.

For workforce related proposals all relevant characteristics may not be included in HR diversity reporting (e.g. pregnancy/maternity). For smaller teams diversity data may be redacted. A high proportion of not known/not disclosed may require an action to address under-reporting.

Although our corporate approach is to collect diversity monitoring for all relevant characteristics, there are gaps in the available local diversity data for some characteristics, especially where this has not always historically been included in census and statutory reporting e.g. for sexual orientation. We also know there are some under-reporting gaps in our workforce diversity information - where personal and confidential information is voluntarily requested from staff.

Although we hold some demographic data on service-users, outlined above, we do not hold data on all service users and there are some gaps in relation to characteristics. This is largely because systems for collecting data were not implemented prior to this service, for example, data on gender reassignment, marriage/civil partnership, pregnancy and sexual orientation is not consistently been completed. When completing reviews, we will ensure service-users protected characteristics are noted and accounted for.

2.4 How have you involved communities and groups that could be affected?

You will nearly always need to involve and consult with internal and external stakeholders during your assessment. The extent of the engagement will depend on the nature of the proposal or change. This should usually include individuals and groups representing different relevant protected characteristics. Please include details of any completed engagement and consultation and how representative this had been of Bristol's diverse communities.

Include the main findings of any engagement and consultation in Section 2.1 above.

If you are managing a workforce change process or restructure please refer to [Managing change or restructure \(sharepoint.com\)](#) for advice on consulting with employees etc. Relevant stakeholders for engagement about workforce changes may include e.g. staff-led groups and trades unions as well as affected staff.

We launched a public consultation on our budget proposals between 09th November 2023 to the 21st December 2023. This consultation set out all the savings proposals we had identified to produce a balanced budget in the context of reduced available funding and increasing financial pressures.

2.5 How will engagement with stakeholders continue?

Explain how you will continue to engage with stakeholders throughout the course of planning and delivery. Please describe where more engagement and consultation is required and set out how you intend to undertake it. Include any targeted work to seek the views of under-represented groups. If you do not intend to undertake it, please set out your justification. You can ask the Equality and Inclusion Team for help in targeting particular groups.

All responses to the Budget Consultation will be analysed and included in the Council's Budget report that will be published on the Bristol City Council website in early 2024. We will take Budget consultation responses into account when developing this and other final proposals to put to the Cabinet and a meeting of the Full Council for approval. The final decision will be taken by Full Council at its budget setting meeting in February / March 2024.

Following the setting of the overall budget envelope there will be extensive engagement, consultation and co-design with affected communities on particular proposals which will inform future decision making prior to implementation. Our approach to public engagement and consultation will proactively target under-represented respondents to increase the participation of people from equality groups and their local representative organisations. This will help to ensure that our services and actions are informed by the views and needs of all our citizens.

Step 3: Who might the proposal impact?

Analysis of impacts must be rigorous. Please demonstrate your analysis of any impacts of the proposal in this section, referring to evidence you have gathered above, and the characteristics protected by the Equality Act 2010. Also include details of existing issues for particular groups that you are aware of and are seeking to address or mitigate through this proposal. See detailed guidance documents for advice on identifying potential impacts etc. [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#)

3.1 Does the proposal have any potentially adverse impacts on people based on their protected or other relevant characteristics?

Consider sub-categories (different kinds of disability, ethnic background etc.) and how people with combined characteristics (e.g. young women) might have particular needs or experience particular kinds of disadvantage.

Where mitigations indicate a follow-on action, include this in the 'Action Plan' Section 4.2 below.

GENERAL COMMENTS (highlight any potential issues that might impact all or many groups)

Even when we plan to consult in more detail on specific service delivery proposals at a later time, we must ensure that any budget setting decisions that are likely to affect future services are informed by sufficient consultation and proper analysis. This is so that decision makers can have due regard to any likely disproportionate or negative impact on the basis of their protected and other relevant characteristics at the time the budget is approved – not afterwards¹.

Decision makers will have the ability to make changes to the individual spending plans following further consultation as appropriate and detailed evaluation of the impact of specific proposals. Within the proposed budget envelope there will be financial mitigation put aside for any non-delivery or amendments to proposals which may occur due to future consideration of equalities issues or other factors.

As well as identifying whether budget changes will have a disproportionate impact on particular groups (e.g., because they are over-represented in a particular cohort), we need to pay particular attention to the risk of indirect discrimination: when an apparently neutral decision puts members of a given group at a particular disadvantage compared with other people because of their different needs and circumstances.

We are also aware of existing structural inequalities and particular considerations, issues, and disparities for people in Bristol based on their characteristics, which we will take into account.

PROTECTED CHARACTERISTICS

Age: Young People	Does your analysis indicate a disproportionate impact? No <input type="checkbox"/> X
Potential impacts:	
Mitigations:	
Age: Older People	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • The average age of service-users is 57, although ages do range from 26-85, 28% if service users are over 65 • Older people in Bristol are: <ul style="list-style-type: none"> ○ less likely to be comfortable using digital services ○ more reliant on public and community transport ○ more likely to be an unpaid carer ○ more likely to help out or volunteer in their community ○ less likely to have formal qualifications • Bristol Ageing Better estimated at least 11,000 older people are experiencing isolation in the city. • We must factor aging and the needs of older people into long term budgeting and service design
Mitigations:	All service-users will be supported with a review to assess their current needs. Care support will be decided on a case-by-case basis in line with the Care Act (2014). Reviews will be completed with a trained social worker and will account for needs related to protected characteristics including Age. Where possible, social workers will signpost to resources. Social workers will be encouraged to use a range of accessible communications to ensure service-users are clear on any changes to care.
Disability	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • All service-users have a level of Disability and so Disabled people will be impacted by this proposal • Of the service-users for which we hold data, we know that 34% have a primary support reason as a learning disability, 34% is in relation to mental health and 26% is unknown • 17% of Bristol's population are disabled. There are more disabled women than men living in Bristol.

	<ul style="list-style-type: none"> • Disabled people should be empowered to make independent living choices and have a say in access to service provision. • Budget setting needs to provide sufficient resource and flexibility to meet our legal duty to make anticipatory and responsive reasonable adjustments for disabled people including: <ul style="list-style-type: none"> ○ changing the way things are done e.g. opening / working times; ○ changes to overcome barriers created by the physical features of premises. ○ providing auxiliary aids e.g. extra equipment or a different or additional service. ○ is 'anticipatory' so we must think in advance and ongoing about what disabled people might reasonably need. • Disabled people must not be charged for their reasonable adjustments, accessible formats or other adaptations. It is a legal requirement under the Equalities Act to ensure information is accessible to disabled employees and service users.
Mitigations:	<p>All service-users will be supported with a Care Act assessment of their current needs. Care support will be decided on a case-by-case basis in line with the Care Act (2014). Assessments/reviews will be completed with a trained social worker and will account for needs related to protected characteristics including Disability status. Where possible, social workers will signpost to resources. Social workers will be encouraged to use a range of accessible communications to ensure service-users are clear on any changes to care. Under the Care Act, Disabled people will also be offered access to Advocacy. Social workers will be line managed and their assessments signed off by a senior manager and they will work with the Support Planning and Brokerage team to ensure all options are explored.</p>
Sex	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • A large proportion of service-users are men (63%) • The average UK pay gap is 15.4% in favour of men. The South West average is 16.6% with women paid 83p for every £1 earned by male counterparts. • Women still bear the majority of caring responsibilities for both children and older relatives. • Women are more likely to be excluded from conversations which affect decision making due to lack of representation in boards / organisational leadership. • Services and workplace requirements may not take into consideration the impact of women's reproductive life course including menstruation, avoiding pregnancy, pregnancy, childbirth, breastfeeding, and menopause. • Young women between the ages of 16 and 24 have higher risk of common mental health problems and higher rates of self-harm and post-traumatic stress disorder etc. • Bristol female preventable mortality rates are significantly higher than the England rates • Nationally 27% of women experience domestic abuse in their lifetimes. The rate of recorded domestic abuse incidents in Bristol has shown a significant rise over the last two years and 74% of victims were female. • Men and boy's health is in general poorer than that of women and girl's • Male life expectancy at birth in Bristol is around four years less than for females. • On average men in Bristol live 18 years in poor health, women live 22 years in poor health • A higher proportion of boys have physical impairments and more boys than girls have diagnosed mental health disorders and learning difficulties.

	<ul style="list-style-type: none"> Men in Bristol are more likely than women to have unhealthy lifestyle behaviours including being overweight and obese, smoking, alcohol and substance misuse There are differences between men and women in health practices and the way they use health services Men are three times more likely than women to take their own lives.
Mitigations:	All service-users will be supported with a review to assess their current needs. Care support will be decided on a case-by-case basis in line with the Care Act (2014). Reviews will be completed with a trained social worker and will account for needs related to protected characteristics including sex. As men are over-represented in the cohort, where possible, social workers will signpost to resources for example men's mental health support. Social workers will be encouraged to use a range of accessible communications to ensure service-users are clear on any changes to care.
Sexual orientation	Does your analysis indicate a disproportionate impact? No <input type="checkbox"/> X
Potential impacts:	We have not identified any specific impacts due to sexual orientation at this stage, however, this may be because of gaps in data and under-reporting. All service-users will be supported with a review to assess their current needs. Care support will be decided on a case-by-case basis in line with the Care Act (2014). Reviews will be completed with a trained social worker and will account for needs related to protected characteristics including sexual orientation. Where possible, social workers will signpost to resources. Social workers will be encouraged to use a range of accessible communications to ensure service-users are clear on any changes to care.
Mitigations:	See general comments above
Pregnancy / Maternity	Does your analysis indicate a disproportionate impact? No <input type="checkbox"/> X
Potential impacts:	
Mitigations:	
Gender reassignment	Does your analysis indicate a disproportionate impact? No <input type="checkbox"/> X
Potential impacts:	
Mitigations:	We have not identified any specific impacts due to the protected characteristic of gender reassignment at this stage, however, this may be because of gaps in data and under-reporting. All service-users will be supported with a review to assess their current needs. Care support will be decided on a case-by-case basis in line with the Care Act (2014). Reviews will be completed with a trained social worker and will account for needs related to protected characteristics including gender reassignment. Where possible, social workers will signpost to resources. Social workers will be encouraged to use a range of accessible communications to ensure service-users are clear on any changes to care.
Race	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> The data available shows 73% are White British, 8% dual /mixed, 5% African, 5% Caribbean 3% Bangladeshi 1% Eastern Europe, Indian, White Irish Ethnic minorities in Bristol experience greater disadvantage than in England and Wales as a whole in education and employment and this is particularly so for Black African people². In the last census (2011) 16% of the population belonged to a Black, Asian or minority ethnic group and this is likely to be higher now. Bangladeshi, Pakistani, and Black ethnic groups are more likely to live in deprived neighbourhoods; and the same groups and Chinese ethnicities are about twice as likely to live on a low income and experience child poverty compared to White groups Organisations may lack cultural competence because minoritised ethnic staff are under- represented. People from Black African, Other, and Black Caribbean groups have persistently high levels of unemployment and almost all ethnic minority groups in Bristol experience employment inequality when compared to White British people.

	<ul style="list-style-type: none"> Black Asian and other minoritised ethnic groups are more likely to be self-employed than the Bristol average and over-represented in low income self-employment including taxis, takeaway restaurants People who do not speak English as a main language may require information in plain English and community language translations or videos etc.
Mitigations:	All service-users will be supported with a review to assess their current needs. Care support will be decided on a case-by-case basis in line with the Care Act (2014). Reviews will be completed with a trained social worker and will account for needs related to protected characteristics including Race and an understanding of health equity. Where possible, social workers will signpost to resources. Social workers will be encouraged to use a range of accessible communications to ensure service-users are clear on any changes to care.
Religion or Belief	Does your analysis indicate a disproportionate impact? No <input type="checkbox"/> X
Potential impacts:	
Mitigations:	We have not identified any specific impacts due to the protected characteristic of gender reassignment at this stage, however, this may be because of gaps in data and under-reporting. All service-users will be supported with a review to assess their current needs. Care support will be decided on a case-by-case basis in line with the Care Act (2014). Reviews will be completed with a trained social worker and will account for needs related to protected characteristics including gender reassignment. Where possible, social workers will signpost to resources. Social workers will be encouraged to use a range of accessible communications to ensure service-users are clear on any changes to care.
Marriage & civil partnership	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	
Mitigations:	
OTHER RELEVANT CHARACTERISTICS	
Socio-Economic (deprivation)	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> Bristol has 41 areas in the most deprived 10% in England, including 3 in the most deprived 1%. The greatest levels of deprivation are in Hartcliffe & Withywood, Filwood and Lawrence Hill. In Bristol 15% of residents - 70,800 people - live in the 10% most deprived areas in England, including 19,000 children and 7,800 older people. There are an estimated 29,045 households living in fuel poverty in Bristol, 14.4% of all households (BEIS, 2022) 4.6% of households have experienced moderate to severe food insecurity, rising to 11.2% in the most deprived areas of the city (QoL 2021-22) 34.6% of people in Bristol are dissatisfied with the way the Council runs things, but this is 47.5% for people living in the most deprived areas of the city (QoL 2021-22). The inequalities gap in life expectancy between the most and least deprived areas in Bristol is 9.9 years for men and 6.7 years for women.
Mitigations:	All service-users will be supported with a review to assess their current needs. Care support will be decided on a case-by-case basis in line with the Care Act (2014). Reviews will be completed with a trained social worker and will account for needs related to protected characteristics including socio-economic status. Where possible, social workers will signpost to resources. Social workers will be encouraged to use a range of accessible communications to ensure service-users are clear on any changes to care. All individuals will be offered a financial assessment that ensure a minimal income and access to benefits and take account of disability related costs.

3.2 Does the proposal create any benefits for people based on their protected or other relevant characteristics?

Outline any potential benefits of the proposal and how they can be maximised. Identify how the proposal will support our [Public Sector Equality Duty](#) to:

- ✓ Eliminate unlawful discrimination for a protected group
- ✓ Advance equality of opportunity between people who share a protected characteristic and those who don't
- ✓ Foster good relations between people who share a protected characteristic and those who don't

The scale of the potential gap in our core funding means that there is very limited opportunity to bring genuine additional benefit to equalities groups in the circumstances. However we have considered as far as possible the need to: eliminate discrimination, harassment, victimisation and any other conduct prohibited under the Equality Act 2010; advance equality of opportunity between people from different groups; and foster good relations between people from different groups.

Our budget savings proposals are aligned to our Corporate Strategy and although we have limited resources our future focus will be on achieving those priorities we have identified including tackling poverty and intergenerational inequality.

There are benefits that all will have a holistic Care Act assessment which will look at their care, needs and outcomes and ensure they continue to be appropriate to needs.

Step 4: Impact

4.1 How has the equality impact assessment informed or changed the proposal?

What are the main conclusions of this assessment? Use this section to provide an overview of your findings. This summary can be included in decision pathway reports etc.

If you have identified any significant negative impacts which cannot be mitigated, provide a justification showing how the proposal is proportionate, necessary, and appropriate despite this.

Summary of significant negative impacts and how they can be mitigated or justified:

Potential that (non chargeable) Supporting People services will become (chargeable) Adult Care services. The mitigations will be that a full Care Act assessment will be completed to look at options and financial assessment to ensure any charges are fair.

Summary of positive impacts / opportunities to promote the Public Sector Equality Duty:

4.2 Action Plan

Use this section to set out any actions you have identified to improve data, mitigate issues, or maximise opportunities etc. If an action is to meet the needs of a particular protected group please specify this.

Improvement / action required	Responsible Officer	Timescale
All relevant EqIAs will be published on the Council's website https://www.bristol.gov.uk/council-spending-performance/council-budgets and continue to be updated as appropriate.		

4.3 How will the impact of your proposal and actions be measured?

How will you know if you have been successful? Once the activity has been implemented this equality impact assessment should be periodically reviewed to make sure your changes have been effective your approach is still appropriate.

Our Equality and Inclusion Annual Progress Reports show what we have done to achieve the aims of our Equality and Inclusion policy and strategy, and the progress we have made including reporting on all relevant KPIs and workforce diversity [Equalities policy - bristol.gov.uk](https://www.bristol.gov.uk/equality-and-inclusion-policy)

The Equality and Inclusion Team need at least five working days to comment and feedback on your EqIA. EqIAs should only be marked as reviewed when they provide sufficient information for decision-makers on the equalities impact of the proposal. Please seek feedback and review from the [Equality and Inclusion Team](#) before requesting sign off from your Director¹.

Equality and Inclusion Team Review:	Director Sign-Off: [seek Director sign off after review by E+I team]
Date:	

¹ Review by the Equality and Inclusion Team confirms there is sufficient analysis for decision makers to consider the likely equality impacts at this stage. This is not an endorsement or approval of the proposal.

Equality Impact Assessment [version 2.12]



Title: 2425 ASC – 7 Focused Reviews	
<input type="checkbox"/> Policy <input type="checkbox"/> Strategy <input type="checkbox"/> Function <input type="checkbox"/> Service <input checked="" type="checkbox"/> Other [please state] <i>Savings Proposal</i>	<input checked="" type="checkbox"/> New <input type="checkbox"/> Already exists / review <input type="checkbox"/> Changing
Directorate: Adults and Communities	Lead Officer name: Mette Le Jakobsen
Service Area: Adult Social Care	Lead Officer role: Director – Adult Social Care

Step 1: What do we want to do?

The purpose of an Equality Impact Assessment is to assist decision makers in understanding the impact of proposals as part of their duties under the Equality Act 2010. Detailed guidance to support completion can be found here [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#).

This assessment should be started at the beginning of the process by someone with a good knowledge of the proposal and service area, and sufficient influence over the proposal. It is good practice to take a team approach to completing the equality impact assessment. Please contact the [Equality and Inclusion Team](#) early for advice and feedback.

1.1 What are the aims and objectives/purpose of this proposal?

Briefly explain the purpose of the proposal and why it is needed. Describe who it is aimed at and the intended aims / outcomes. Where known also summarise the key actions you plan to undertake. Please use plain English, avoiding jargon and acronyms. Equality Impact Assessments are viewed by a wide range of people including decision-makers and the wider public.

Budget context

Every year, the council must agree an annual budget which balances the money we spend with the money we are expecting to receive. Councils across the country are continuing to face financial challenges and based on our current forecasts, we face a funding gap over the next five years (to 2028/29) of up to £81.2 million dependent on the severity of factors such as inflation, funding changes, and unavoidable service pressures. This is in addition to the £17.7 million of savings and efficiencies proposals for 2024-2028 outlined in the 2023/24 budget and assumed delivery of 2023/24 savings in the current year.

The Council has defined statutory responsibilities, but deliver against a far broader agenda, providing universal services benefiting the whole community, and targeted services aimed at individuals, communities with particular needs, and businesses – administered by our workforce, city partners, stakeholder organisations and commissioned services.

To address these challenges, we must look again across all of our services to find where we can do things differently to reduce costs, be more efficient in how we do things and, in some cases, stop doing some things entirely.

This proposal

Reviews form part of our statutory responsibilities under the Care Act (2014). We need to prioritise this area of practice to ensure that we undertake planned Care Act reviews for people who are receiving different forms of care and support services (e.g. homecare, care home placements, Extra Care Housing, Supported Living, Outreach Services) to ensure we are helping people to maximise their independence and achieve agreed outcomes, access the right support, making best use of community resources and Technology Enabled Care and are getting value for money from care and support services.

In January 2024, there are 2575 people who are classed as being overdue a review (12 months+ since their last support plan review or assessment). Through undertaking planned Care Act reviews we will help people access more

meaningful support and enable better outcomes for people, e.g. helping people to move out of care homes to live more independently, helping people access their community, access employment, or make use of Technology Enabled Care. This also leads to more cost-effective support. We are also working in partnership with care providers to ensure that their pricing methodology is effective and offering best value.

Reviews are a statutory requirement under the Care Act and we will be undertaking them in line with Care Act requirements and will have a responsibility to meet any identified eligible needs.

We will not target individuals or attach savings to specific packages or cohorts of service users. Savings will be realised through more cost-effective, appropriate support opportunities which enable people to live more independently.

This affects all service users and will be carried out yearly in line with statutory duties.

1.2 Who will the proposal have the potential to affect?

<input type="checkbox"/> Bristol City Council workforce	<input checked="" type="checkbox"/> Service users	<input type="checkbox"/> The wider community
<input checked="" type="checkbox"/> Commissioned services	<input type="checkbox"/> City partners / Stakeholder organisations	
Additional comments:		

1.3 Will the proposal have an equality impact?

Could the proposal affect access levels of representation or participation in a service, or does it have the potential to change e.g. quality of life: health, education, or standard of living etc.?

If 'No' explain why you are sure there will be no equality impact, then skip steps 2-4 and request review by Equality and Inclusion Team.

If 'Yes' complete the rest of this assessment, or if you plan to complete the assessment at a later stage please state this clearly here and request review by the Equality and Inclusion Team.

<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	[please select]
--	------------------------------------	-----------------

Focussed reviews will not disproportionately affect people with protected characteristics as we are not targeting specific individuals or attaching savings to specific packages or cohorts of service users, however, some protected characteristics such as Disabled people are over-represented in service-users, compared to the Bristol average population.

Step 2: What information do we have?

2.1 What data or evidence is there which tells us who is, or could be affected?

Please use this section to demonstrate an understanding of who could be affected by the proposal. Include general population data where appropriate, and information about people who will be affected with particular reference to protected and other relevant characteristics: [How we measure equality and diversity \(bristol.gov.uk\)](http://bristol.gov.uk)

Use one row for each evidence source and say which characteristic(s) it relates to. You can include a mix of qualitative and quantitative data e.g. from national or local research, available data or previous consultations and engagement activities.

Outline whether there is any over or under representation of equality groups within relevant services - don't forget to benchmark to the local population where appropriate. Links to available data and reports are here [Data, statistics and intelligence \(sharepoint.com\)](http://sharepoint.com). See also: [Bristol Open Data \(Quality of Life, Census etc.\)](#); [Joint Strategic Needs Assessment \(JSNA\)](#); [Ward Statistical Profiles](#).

For workforce / management of change proposals you will need to look at the diversity of the affected teams using available evidence such as [HR Analytics: Power BI Reports \(sharepoint.com\)](#) which shows the diversity profile of council teams and service areas. Identify any over or under-representation compared with Bristol economically active citizens for different characteristics. Additional sources of useful workforce evidence include the [Employee Staff Survey Report](#) and [Stress Risk Assessment](#)

Data / Evidence Source [Include a reference where known]	Summary of what this tells us
<u>Census 2021</u>	The Census details the demographic profile of Bristol and demonstrated that the population of the city is increasingly diverse in comparison to previous data.
<u>The population of Bristol</u>	Updated annually. The report brings together statistics on the current estimated population of Bristol, recent trends in population, future projections and looks at the key characteristics of the people living in Bristol. This report shows that Bristol has more than 287 different ethnic groups in the city, more than 185 countries of birth represented, at least 45 religions and more than 90 languages spoken by people living in the city.
<u>Ward Profile Data</u>	The Ward Profiles provide a range of data-sets, including Population, Life Expectancy, health and education disparities etc. for each of Bristol’s electoral wards. The data shows us that Frome Vale ward is uniquely in the top 4 for people receiving a service from adult social care for all ages.
<u>Quality of Life Report 22-23</u>	The Quality of Life (QoL) survey is an annual randomised sample survey of the Bristol population. There was mixed picture with some improvement but 30 indicators were significantly worse in 2022 – with most negative changes in in the Themes: Health & Wellbeing (8); Sustainability & Environment (7); Transport (5); Community and Living (4). One of the largest deteriorations was the percentage of people whose financial circumstances prevent them from leaving their home when they want to.
<u>JSNA Data Profiles</u>	The Joint Strategic Needs Assessment reports on the health and wellbeing needs of the people of Bristol. It brings together detailed information on local health and wellbeing needs and looks ahead at emerging challenges and projected future needs. The JSNA is used to provide a comprehensive picture of the health and wellbeing needs of Bristol (now and in the future); to inform decisions about how we design, commission and deliver services, and also about how the urban environment is planned and managed; to improve and protect health and wellbeing outcomes across the city while reducing health inequalities; and to provide partner organisations with information on the changing health and wellbeing needs of Bristol, at a local level, to support better service delivery.
Power BI - Internal link only	In January 2024, there are 2575 people who are classed as being overdue a review (12 months+ since their last support plan review or assessment). This is equivalent of 46.8% of the total amount of people that

Bristol City Council commissions an individual adult care service for. This data includes people who are 1 day past the 12 month period. The longer the waiting period for review, the lower the percentage is of people overdue.

In terms of reviews for people in receipt of commissioned adult social care services, 49.2% of adults under the age of 65 are overdue an annual review of their support plan in comparison to 43.4% of adults aged 65 or over.

In terms of reviews for people with disabilities in receipt of commissioned adult social care services, 46.3% are overdue an annual review of their support plan.

The data with regard to reviews of support plans for people in receipt of commissioned adult social care services shows that people who are non-white are more likely to be overdue an annual review. Within this data there are 384 people where ethnicity is recorded as 'unknown'.

2.2 Do you currently monitor relevant activity by the following protected characteristics?

- | | | |
|--|---|---|
| <input checked="" type="checkbox"/> Age | <input checked="" type="checkbox"/> Disability | <input checked="" type="checkbox"/> Gender Reassignment |
| <input checked="" type="checkbox"/> Marriage and Civil Partnership | <input checked="" type="checkbox"/> Pregnancy/Maternity | <input checked="" type="checkbox"/> Race |
| <input checked="" type="checkbox"/> Religion or Belief | <input checked="" type="checkbox"/> Sex | <input checked="" type="checkbox"/> Sexual Orientation |

2.3 Are there any gaps in the evidence base?

Where there are gaps in the evidence, or you don't have enough information about some equality groups, include an equality action to find out in section 4.2 below. This doesn't mean that you can't complete the assessment without the information, but you need to follow up the action and if necessary, review the assessment later. If you are unable to fill in the gaps, then state this clearly with a justification.

For workforce related proposals all relevant characteristics may not be included in HR diversity reporting (e.g. pregnancy/maternity). For smaller teams diversity data may be redacted. A high proportion of not known/not disclosed may require an action to address under-reporting.

Although our corporate approach is to collect diversity monitoring for all relevant characteristics, there are gaps in the available local diversity data for some characteristics, especially where this has not always historically been included in census and statutory reporting e.g. for sexual orientation.

There are some gaps in diversity monitoring for service users where this has not been recorded on our Liquid Logic Adultcare System (LAS), e.g. for Sexual orientation

2.4 How have you involved communities and groups that could be affected?

You will nearly always need to involve and consult with internal and external stakeholders during your assessment. The extent of the engagement will depend on the nature of the proposal or change. This should usually include individuals and groups representing different relevant protected characteristics. Please include details of any completed engagement and consultation and how representative this had been of Bristol's diverse communities.

Include the main findings of any engagement and consultation in Section 2.1 above.

If you are managing a workforce change process or restructure please refer to [Managing a change process or restructure \(sharepoint.com\)](#) for advice on consulting with employees etc. Relevant stakeholders for engagement about workforce changes may include e.g. staff-led groups and trades unions as well as affected staff.

We launched a public consultation on our budget proposals between 09th November 2023 to the 21st December 2023. This consultation set out all the savings proposals we had identified to produce a balanced budget in the context of reduced available funding and increasing financial pressures.

2.5 How will engagement with stakeholders continue?

Explain how you will continue to engage with stakeholders throughout the course of planning and delivery. Please describe where more engagement and consultation is required and set out how you intend to undertake it. Include any targeted work to seek the views of under-represented groups. If you do not intend to undertake it, please set out your justification. You can ask the Equality and Inclusion Team for help in targeting particular groups.

All responses to the Budget Consultation will be analysed and included in the Council's Budget report that will be published on the Bristol City Council website in early 2023. We will take Budget consultation responses into account when developing this and other final proposals to put to the Cabinet and a meeting of the Full Council for approval. The final decision will be taken by Full Council at its budget setting meeting in February / March 2024.

Following the setting of the overall budget envelope there will be extensive engagement, consultation and co-design with affected communities on particular proposals which will inform future decision making prior to implementation. Our approach to public engagement and consultation will proactively target under-represented respondents to increase the participation of people from equality groups and their local representative organisations. This will help to ensure that our services and actions are informed by the views and needs of all our citizens.

We have scheduled a workshop with people with lived expertise in January 2024 to co-produce a vision for adult social care – this will relate to our approach around reviews.

Step 3: Who might the proposal impact?

Analysis of impacts must be rigorous. Please demonstrate your analysis of any impacts of the proposal in this section, referring to evidence you have gathered above and the characteristics protected by the Equality Act 2010. Also include details of existing issues for particular groups that you are aware of and are seeking to address or mitigate through this proposal. See detailed guidance documents for advice on identifying potential impacts etc. [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#)

3.1 Does the proposal have any potentially adverse impacts on people based on their protected or other relevant characteristics?

Consider sub-categories and how people with combined characteristics (e.g. young women) might have particular needs or experience particular kinds of disadvantage.

Where mitigations indicate a follow-on action, include this in the 'Action Plan' Section 4.2 below.

GENERAL COMMENTS (highlight any potential issues that might impact all or many groups)

Even when we plan to consult in more detail on specific service delivery proposals at a later time, we must ensure that any budget setting decisions that are likely to affect future services are informed by sufficient consultation and proper analysis. This is so that decision makers can have due regard to any likely disproportionate or negative impact on the basis of their protected and other relevant characteristics at the time the budget is approved – not afterwards.

Decision makers will have the ability to make changes to the individual spending plans following further consultation as appropriate and detailed evaluation of the impact of specific proposals. Within the proposed budget envelope there will be financial mitigation put aside for any non-delivery or amendments to proposals which may occur due to future consideration of equalities issues or other factors.

As well as identifying whether budget changes will have a disproportionate impact on particular groups (e.g., because they are over-represented in a particular cohort), we need to pay particular attention to the risk of indirect discrimination: when an apparently neutral decision puts members of a given group at a particular disadvantage compared with other people because of their different needs and circumstances.

We are also aware of existing structural inequalities and particular considerations, issues, and disparities for people in Bristol based on their characteristics, which we will take into account.

This proposal:

As people’s needs change over time there will be significant positive impacts on people who receive a package of care. This is because they will get a package of care that is in line with their current needs. The review will make sure that support plans are proportionate to need and also build in the current model of delivering adult social care. Adult social care seeks to enable maximum independence where possible and appropriate, and the use of community resources wherever possible as a way of building resilience and self-reliance. More people will be diverted to tier 1 support which will increase their independence and wellbeing and avoid them becoming dependent on funded services which reduce their independence. We are mindful of the resources available in the community and will ensure that the resources for individuals to utilise are available where people take up tier 1 support.

Some people who are reviewed may find their package of support has reduced. However there will not be a significant negative impact as any change to a support plan will be in line with their assessed need. Decision making will be fair and based on Care Act statutory guidance. We will not be changing any of the decision making processes around assessing care needs or allocating care. Whilst there may be savings attached to this proposal, we will be using a person centred approach and will ensure that the appropriate level of care is provided at all times.

PROTECTED CHARACTERISTICS

Age: Young People	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	We have not identified any disproportionate negative impact on young people at this stage. We will take a person-centred approach to reviews and any change to a support plan will be in line with their assessed need.
Mitigations:	See general comments above.
Age: Older People	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • 43.4% of the cohort are adults aged 65 or over • Older people in Bristol are: <ul style="list-style-type: none"> ○ less likely to be comfortable using digital services ○ more reliant on public and community transport ○ more likely to be an unpaid carer ○ more likely to help out or volunteer in their community ○ less likely to have formal qualifications • Bristol Ageing Better estimated at least 11,000 older people are experiencing isolation in the city. • We must factor aging and the needs of older people into long term budgeting and service design
Mitigations:	We will take a person-centred approach to reviews, any change to a support plan will be in line with their assessed need. Where we are using Technology Enabled Care to support independence, we will ensure we train and support people to use the technology based on their needs, and ensure they are confident in using technology before transitioning over. The use, and confidence levels of technology enabled care will be monitored at each review to ensure people are content with using equipment. Any changes to care will be communicated in an accessible way, dependent on the service-user.
Disability	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • In terms of reviews for people with disabilities in receipt of commissioned adult social care services, 46.3% are overdue an annual review of their support plan.

	<ul style="list-style-type: none"> • 17% of Bristol’s population are disabled. There are more disabled women than men living in Bristol. • A higher proportion of disabled people rent from a social provider (local authority or housing association) • Disabled people experience higher rates of hate crime and domestic abuse compared to the general population • Disabled people should be empowered to make independent living choices and have a say in access to service provision. • Budget setting needs to provide sufficient resource and flexibility to meet our legal duty to make anticipatory and responsive reasonable adjustments for disabled people including: <ul style="list-style-type: none"> ○ changing the way things are done e.g. opening / working times; ○ changes to overcome barriers created by the physical features of premises. ○ providing auxiliary aids e.g. extra equipment or a different or additional service. ○ is ‘anticipatory’ so we must think in advance and ongoing about what disabled people might reasonably need. • Disabled people must not be charged for their reasonable adjustments, accessible formats or other adaptations. It is a legal requirement under the Equalities Act to ensure information is accessible to disabled employees and service users.
Mitigations:	A high proportion of Disabled people are overdue a review in comparison with the Bristol average. We will take a person-centred approach to reviews, any change to a support plan will be in line with their assessed need. Any changes to care will be communicated in an accessible way, dependent on the service-user. We hope this proposal will have a positive impact on Disabled people, by increasing reviews we hope that people will be better assessed to ensure they are receiving the support that is appropriate to them. We will ensure staff undertaking reviews have a good understanding of Disability equality and empowered to support Disabled peoples needs.
Sex	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	We have not identified any disproportionate negative impact on sex at this stage. We will take a person-centred approach to reviews and any change to a support plan will be in line with their assessed need.
Mitigations:	See general comments above.
Sexual orientation	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	We have not identified any disproportionate negative impact on sexual orientation at this stage. We will take a person-centred approach to reviews and any change to a support plan will be in line with their assessed need.
Mitigations:	See general comments above.
Pregnancy / Maternity	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	We have not identified any disproportionate negative impact on pregnancy and maternity at this stage. We will take a person-centred approach to reviews and any change to a support plan will be in line with their assessed need.
Mitigations:	See general comments above.
Gender reassignment	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	We have not identified any disproportionate negative impact on gender reassignment at this stage. We will take a person-centred approach to reviews and any change to a support plan will be in line with their assessed need.
Mitigations:	See general comments above.
Race	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • people in receipt of commissioned adult social care services shows that people who are non-white are more likely to be overdue an annual review. Within this data there are 384 people whose ethnicity is recorded as ‘unknown’.

	<ul style="list-style-type: none"> Organisations may lack cultural competence because minoritised ethnic staff are under- represented. Just over a quarter of people of Black ethnicity report below average mental wellbeing, higher than the city average People from Black African, Other, and Black Caribbean groups have persistently high levels of unemployment and almost all ethnic minority groups in Bristol experience employment inequality when compared to White British people. People from minoritised ethnic backgrounds are underrepresented in political and civic leadership. People who do not speak English as a main language may require information in plain English and community language translations or videos etc.
Mitigations:	A high proportion of non-white people are overdue a review in comparison with the Bristol average. We will take a person-centred approach to reviews, any change to a support plan will be in line with their assessed need. Any changes to care will be communicated in an accessible way, dependent on the service-user. We hope this proposal will have a positive impact on people, by increasing reviews we hope that people will be better assessed to ensure they are receiving the support that is appropriate to them. We will ensure staff undertaking reviews have a good understanding of health equity, and the need for a tailored approach.
Religion or Belief	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	We have not identified any disproportionate negative impact on religion at this stage. We will take a person-centred approach to reviews and any change to a support plan will be in line with their assessed need.
Mitigations:	See general comments above.
Marriage & civil partnership	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	We have not identified any disproportionate negative impact on marriage and civil partnership at this stage. We will take a person-centred approach to reviews and any change to a support plan will be in line with their assessed need.
Mitigations:	See general comments above.
OTHER RELEVANT CHARACTERISTICS	
Socio-Economic (deprivation)	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	See general comments above.
Mitigations:	See general comments above.
Carers	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	See general comments above.
Mitigations:	See general comments above.
Other groups [Please add additional rows below to detail the impact for any other relevant groups as appropriate e.g. asylum seekers and refugees; care experienced; homelessness; armed forces personnel and veterans]	
Potential impacts:	
Mitigations:	

3.2 Does the proposal create any benefits for people based on their protected or other relevant characteristics?

Outline any potential benefits of the proposal and how they can be maximised. Identify how the proposal will support our [Public Sector Equality Duty](#) to:

- ✓ Eliminate unlawful discrimination for a protected group
- ✓ Advance equality of opportunity between people who share a protected characteristic and those who don't
- ✓ Foster good relations between people who share a protected characteristic and those who don't

The support that people receive will better reflect their individual support needs, including their cultural needs or any needs that are specifically related to their protected or other relevant characteristic. The more frequently we undertake reviews with people we can be more confident that any impacts of having a protected characteristic is taken into account in the way they receive and manage their support.

Step 4: Impact

4.1 How has the equality impact assessment informed or changed the proposal?

What are the main conclusions of this assessment? Use this section to provide an overview of your findings. This summary can be included in decision pathway reports etc.

If you have identified any significant negative impacts which cannot be mitigated, provide a justification showing how the proposal is proportionate, necessary, and appropriate despite this.

Summary of significant negative impacts and how they can be mitigated or justified:

There are no significant impacts with this proposal. We will however monitor to ensure that this continues to be the case.

Summary of positive impacts / opportunities to promote the Public Sector Equality Duty:

Need to ensure that planned reviews enable people with protected characteristics to meet assessed needs and maximise their outcomes.

4.2 Action Plan

Use this section to set out any actions you have identified to improve data, mitigate issues, or maximise opportunities etc. If an action is to meet the needs of a particular protected group please specify this.

Improvement / action required	Responsible Officer	Timescale
Ensure service user identity reporting is updated by practitioners on LAS through case auditing.	Maria Hamood	Ongoing
All relevant EqIAs will be published on the Council's website https://www.bristol.gov.uk/council-spending-performance/council-budgets and continue to be updated as appropriate.	BCC SROs	Ongoing

4.3 How will the impact of your proposal and actions be measured?

How will you know if you have been successful? Once the activity has been implemented this equality impact assessment should be periodically reviewed to make sure your changes have been effective your approach is still appropriate.


Power BI data is able to show us:

- Numbers of people with different protected characteristics who are awaiting a review
- Cost change outcomes of reviews alongside group identity
- Reviews outcome forms are completed after each review in our planned reviews team (Citywide Communities Review Team) which ensure the impact for the service user, family, carer, and provider is captured (often in their own words if possible). We can quality assure our reviews utilising these alongside a range of measures.

Step 5: Review

The Equality and Inclusion Team need at least five working days to comment and feedback on your EqIA. EqIAs should only be marked as reviewed when they provide sufficient information for decision-makers on the equalities

impact of the proposal. Please seek feedback and review from the [Equality and Inclusion Team](#) before requesting sign off from your Director¹.

Equality and Inclusion Team Review: <i>Reviewed by the Equality and Inclusion Team</i>	Director Sign-Off: 
Date: 10/01/24	Date: 10/1/24

¹ Review by the Equality and Inclusion Team confirms there is sufficient analysis for decision makers to consider the likely equality impacts at this stage. This is not an endorsement or approval of the proposal.

Equality Impact Assessment [version 2.12]



Title: GAP25 – Optimising Reablement	
<input type="checkbox"/> Policy <input type="checkbox"/> Strategy <input type="checkbox"/> Function <input type="checkbox"/> Service <input checked="" type="checkbox"/> Other [please state] <i>Savings Proposal</i>	<input checked="" type="checkbox"/> New <input type="checkbox"/> Already exists / review <input type="checkbox"/> Changing
Directorate: Adults and Communities	Lead Officer name: Mette Le Jakobsen
Service Area: Adult Social Care	Lead Officer role: Director – Adult Social Care

Step 1: What do we want to do?

The purpose of an Equality Impact Assessment is to assist decision makers in understanding the impact of proposals as part of their duties under the Equality Act 2010. Detailed guidance to support completion can be found here [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#).

This assessment should be started at the beginning of the process by someone with a good knowledge of the proposal and service area, and sufficient influence over the proposal. It is good practice to take a team approach to completing the equality impact assessment. Please contact the [Equality and Inclusion Team](#) early for advice and feedback.

1.1 What are the aims and objectives/purpose of this proposal?

Briefly explain the purpose of the proposal and why it is needed. Describe who it is aimed at and the intended aims / outcomes. Where known also summarise the key actions you plan to undertake. Please use plain English, avoiding jargon and acronyms. Equality Impact Assessments are viewed by a wide range of people including decision-makers and the wider public.

Budget context

Every year, the council must agree an annual budget which balances the money we spend with the money we are expecting to receive. Councils across the country are continuing to face financial challenges and based on our current forecasts, we face a funding gap over the next five years (to 2028/29) of up to £81.2 million dependent on the severity of factors such as inflation, funding changes, and unavoidable service pressures. This is in addition to the £17.7 million of savings and efficiencies proposals for 2024-2028 outlined in the 2023/24 budget and assumed delivery of 2023/24 savings in the current year.

The Council has defined statutory responsibilities, but deliver against a far broader agenda, providing universal services benefiting the whole community, and targeted services aimed at individuals, communities with particular needs, and businesses – administered by our workforce, city partners, stakeholder organisations and commissioned services.

To address these challenges, we must look again across all of our services to find where we can do things differently to reduce costs, be more efficient in how we do things and, in some cases, stop doing some things entirely.

This proposal

Bristol City Council’s Reablement service provides a person-centred approach within health and social care that helps individuals to learn or re-learn the skills necessary to be able to engage in activities / occupations that are important to them, usually following an illness or hospital discharge, Disability or accident. The service supports facilitation of discharge from acute settings as well as prevention of

admission to a hospital setting. The Reablement Service provides short term help and support in the community for Bristol citizens within their own home.

Activities of daily living would include Meal preparation, personal care, medication management, confidence building. The service includes Reablement Support Assistants as well as Occupational Therapists. Service users who use Reablement are predominantly in the 75 to 85 + age bracket, are predominantly white British and female.

Reablement is critical in supporting new demand to achieve a greater level of independence as well as supporting existing clients to achieve a greater level of independence. Bristol City Council (BCC) commissioned a strategic partner, Peopletoo to carry out an analysis of all reablement episodes carried out since 1 April 2021 and comparing that to active services for the individuals who received reablement. It identified that: Only 4.4% of Reablement was delivered to someone with an existing package of care. Of reablement episodes that were referred from the Community, only 5.3% was delivered to someone with an existing package of care. This identifies that there is an opportunity to increase community Reablement and increase independence of people in the community with available Reablement capacity.

In summary, the key activities related to this proposal will be:

- A targeted approach to Increase utilisation by 50% for community referrals.
- Use data available to take an evidenced based approach to decision making and to inform future planning for Reablement.
- Closer working with community Health partners to improve utilisation of the workforce, reduce Reablement waiting times and increase capacity to support a greater number of people.
- Engage with people who use the service to inform any service changes needed.

Key actions which will be undertaken include:

- data analysis
- consultation with patients
- awareness raising with people in health settings
- analysing referral rates

Overall, this proposal is anticipated to have a positive equalities impact, through more uptake of the service and more people supported to live independently in their own home.

1.2 Who will the proposal have the potential to affect?

<input checked="" type="checkbox"/> Bristol City Council workforce	<input checked="" type="checkbox"/> Service users	<input checked="" type="checkbox"/> The wider community
<input type="checkbox"/> Commissioned services	<input checked="" type="checkbox"/> City partners / Stakeholder organisations	

1.3 Will the proposal have an equality impact?

Could the proposal affect access levels of representation or participation in a service, or does it have the potential to change e.g. quality of life: health, education, or standard of living etc.?

If 'No' explain why you are sure there will be no equality impact, then skip steps 2-4 and request review by Equality and Inclusion Team.

If 'Yes' complete the rest of this assessment, or if you plan to complete the assessment at a later stage please state this clearly here and request review by the Equality and Inclusion Team.

<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	[please select]
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Step 2: What information do we have?

2.1 What data or evidence is there which tells us who is, or could be affected?

Please use this section to demonstrate an understanding of who could be affected by the proposal. Include general population data where appropriate, and information about people who will be affected with particular reference to protected and other relevant characteristics: [How we measure equality and diversity \(bristol.gov.uk\)](https://www.bristol.gov.uk/equality-diversity)

Use one row for each evidence source and say which characteristic(s) it relates to. You can include a mix of qualitative and quantitative data e.g. from national or local research, available data or previous consultations and engagement activities.

Outline whether there is any over or under representation of equality groups within relevant services - don't forget to benchmark to the local population where appropriate. Links to available data and reports are here [Data, statistics and intelligence \(sharepoint.com\)](https://www.bristol.gov.uk/data-statistics-intelligence). See also: [Bristol Open Data \(Quality of Life, Census etc.\)](https://www.bristol.gov.uk/open-data); [Joint Strategic Needs Assessment \(JSNA\)](https://www.bristol.gov.uk/joint-strategic-needs-assessment); [Ward Statistical Profiles](https://www.bristol.gov.uk/ward-statistical-profiles).

For workforce / management of change proposals you will need to look at the diversity of the affected teams using available evidence such as [HR Analytics: Power BI Reports \(sharepoint.com\)](https://www.bristol.gov.uk/hr-analytics-power-bi-reports) which shows the diversity profile of council teams and service areas. Identify any over or under-representation compared with Bristol economically active citizens for different characteristics. Additional sources of useful workforce evidence include the [Employee Staff Survey Report](https://www.bristol.gov.uk/employee-survey-report) and [Stress Risk Assessment](https://www.bristol.gov.uk/stress-risk-assessment)

Data / Evidence Source [Include a reference where known]	Summary of what this tells us
https://www.bristol.gov.uk/council-and-mayor/policies-plans-and-strategies/social-care-and-health/joint-strategic-needs-assessment/about-the-joint-strategic-needs-assessment	It sets out our local health and wellbeing priorities and is based on evidence from our Joint Strategic Health Assessment , ambitions in the One City Plan , and feedback from community engagement. Detailed actions relating to each priority are developed or overseen by the Health and Wellbeing Board at monthly meetings.
https://www.bristol.gov.uk/statistics-census-information/census-2021	The Census details the demographic profile of Bristol.
https://www.bristol.gov.uk/files/documents/1840-bristol-key-facts-2022/	Population Profiles for Equalities Groups bring together detailed analysis looking at equalities groups and how they differ in relation to age, health, employment, education and housing, and maps the distribution of equalities groups across the city.
	Service users who use Reablement are predominantly in the 75 to 85 + age bracket, are predominantly white British and female. A snapshot of current SU's on the Reablement caseload is as follows: Location South Bristol area: 50 service users

Inner City and East area: 44 service users
North Bristol area: 36 service users.

Gender

Female: 57.7%

Male: 42.3%

Ethnicity

White: 92

Unknown: 29

Black, African, Carribean: 6

Mixed/multiple: 4

Asian, Asian/British: 2

Age Range

25-44 – 0.8%

45-64 - 6.2%

65 – 74 – 13.1%

75-84 – 32.3%

85 + 47.7%

Additional comments:

2.2 Do you currently monitor relevant activity by the following protected characteristics?

- | | | |
|--|---|---|
| <input checked="" type="checkbox"/> Age | <input checked="" type="checkbox"/> Disability | <input checked="" type="checkbox"/> Gender Reassignment |
| <input checked="" type="checkbox"/> Marriage and Civil Partnership | <input checked="" type="checkbox"/> Pregnancy/Maternity | <input checked="" type="checkbox"/> Race |
| <input checked="" type="checkbox"/> Religion or Belief | <input checked="" type="checkbox"/> Sex | <input checked="" type="checkbox"/> Sexual Orientation |

2.3 Are there any gaps in the evidence base?

Where there are gaps in the evidence, or you don't have enough information about some equality groups, include an equality action to find out in section 4.2 below. This doesn't mean that you can't complete the assessment without the information, but you need to follow up the action and if necessary, review the assessment later. If you are unable to fill in the gaps, then state this clearly with a justification.

For workforce related proposals all relevant characteristics may not be included in HR diversity reporting (e.g. pregnancy/maternity). For smaller teams diversity data may be redacted. A high proportion of not known/not disclosed may require an action to address under-reporting.

Although our corporate approach is to collect diversity monitoring for all relevant characteristics, there are gaps in the available local diversity data for some characteristics, especially where this has not always historically been included in census and statutory reporting e.g. for sexual orientation.

We also know there are some under-reporting gaps in our workforce diversity information - where personal and confidential information is voluntarily requested from staff.

There are some reporting gaps in our recording of service users' equalities data where this is not recorded or unknown (around 10%) for most categories. Our Power BI report currently only reports on sex, ethnicity, age and religion and does not report on gender reassignment or sexual orientation.

2.4 How have you involved communities and groups that could be affected?

You will nearly always need to involve and consult with internal and external stakeholders during your assessment. The extent of the engagement will depend on the nature of the proposal or change. This should usually include individuals and groups representing different relevant protected characteristics. Please include details of any completed engagement and consultation and how representative this had been of Bristol's diverse communities.

Include the main findings of any engagement and consultation in Section 2.1 above.

If you are managing a workforce change process or restructure please refer to [Managing a change process or restructure \(sharepoint.com\)](#) for advice on consulting with employees etc. Relevant stakeholders for engagement about workforce changes may include e.g. staff-led groups and trades unions as well as affected staff.

We launched a public consultation on our budget proposals between 9th December and 21st December 2023. This consultation set out all the savings proposals we had identified to produce a balanced budget in the context of reduced available funding and increasing financial pressures.

We are also working with our Health partners and Commissioning colleagues to ensure there is a joined-up approach when reviewing pathways. We will continue to engage with people who use the service to inform any service changes needed.

2.5 How will engagement with stakeholders continue?

Explain how you will continue to engage with stakeholders throughout the course of planning and delivery. Please describe where more engagement and consultation are required and set out how you intend to undertake it. Include any targeted work to seek the views of under-represented groups. If you do not intend to undertake it, please set out your justification. You can ask the Equality and Inclusion Team for help in targeting particular groups.

All responses to the Budget Consultation will be analysed and included in the Council's Budget report that will be published on the Bristol City Council website in early 2024. We will take Budget consultation responses into account when developing this and other final proposals to put to the Cabinet and a meeting of the Full Council for approval. The final decision will be taken by Full Council at its budget setting meeting in February / March 2024

Following the setting of the overall budget envelope there will be extensive engagement, consultation and co-design with affected communities on proposals which will inform future decision making prior to implementation. Our approach to public engagement and consultation will proactively target under-represented respondents to increase the participation of people from equality groups and their local representative organisations. This will help to ensure that our services and actions are informed by the views and needs of all our citizens.

Step 3: Who might the proposal impact?

Analysis of impacts must be rigorous. Please demonstrate your analysis of any impacts of the proposal in this section, referring to evidence you have gathered above and the characteristics protected by the Equality Act 2010. Also include details of existing issues for particular groups that you are aware of and are seeking to address or mitigate through this proposal. See detailed guidance documents for advice on identifying potential impacts etc. [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#)

3.1 Does the proposal have any potentially adverse impacts on people based on their protected or other relevant characteristics?

Consider sub-categories and how people with combined characteristics (e.g. young women) might have particular needs or experience particular kinds of disadvantage.

Where mitigations indicate a follow-on action, include this in the 'Action Plan' Section 4.2 below.

GENERAL COMMENTS (highlight any potential issues that might impact all or many groups)

Even when we plan to consult in more detail on specific service delivery proposals at a later time, we must ensure that any budget setting decisions that are likely to affect future services are informed by sufficient consultation and proper analysis. This is so that decision makers can have due regard to any

likely disproportionate or negative impact based on their protected and other relevant characteristics at the time the budget is approved – not afterwards¹.

Decision makers will have the ability to make changes to the individual spending plans following further consultation as appropriate and detailed evaluation of the impact of specific proposals. Within the proposed budget envelope there will be financial mitigation put aside for any non-delivery or amendments to proposals which may occur due to future consideration of equalities issues or other factors.

As well as identifying whether budget changes will have a disproportionate impact on group's we need to pay particular attention to the risk of indirect discrimination. We are aware that more women than men access the service along with a workforce which is predominantly female. When an apparently neutral decision puts members of a given group at a particular disadvantage compared with other people because of their different needs and circumstances. We are also aware of existing structural inequalities and particular considerations, issues, and disparities for people in Bristol based on their characteristics, which we will consider.

PROTECTED CHARACTERISTICS

Age: Young People	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	
Mitigations:	
Age: Older People	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • Older people in Bristol are overrepresented in our service and are: <ul style="list-style-type: none"> ○ Less likely to be comfortable using digital services ○ more reliant on public and community transport ○ more likely to be an unpaid carer ○ more likely to help or volunteer in their community ○ less likely to have formal qualifications • Bristol Ageing Better says at least 11,000 older people are experiencing isolation in the city. • People who use the service are predominantly in the 75 to 85 + age bracket, are predominantly white British and female. • We must factor aging and the needs of older people into long term budgeting and service design.
Mitigations:	<ul style="list-style-type: none"> • Should significant changes be proposed a review would need to be considered with regards to the extent to which service users can be referred to other provision. The service will work in collaboration with Commissioning to support ongoing service development which meets the needs of Bristol citizens. • Any change to the service will consider any potential impact on different characteristic and any alternative provision available to deliver Reablement. • Bristol City Council's Reablement service provides a person-centred approach and so needs related to age will be considered on a case-by-case basis. • Overall, the proposal is anticipated to have a positive impact on older people by a greater utilisation of the service, leading to an increase in people who are able to live independently in their own home.
Disability	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>

Potential impacts:	<ul style="list-style-type: none"> • 17% of Bristol’s population are disabled. There are more disabled women than men living in Bristol. • Disabled people should be empowered to make independent living choices and have a say in access to service provision. • Budget setting needs to provide sufficient resource and flexibility to meet our legal duty to make anticipatory and responsive reasonable adjustments for disabled people including: <ul style="list-style-type: none"> ○ changing the way things are done e.g. opening / working times; ○ changes to overcome barriers created by the physical features of premises. ○ providing auxiliary aids e.g. extra equipment or a different or additional service. ○ is ‘anticipatory’ so we must think in advance and ongoing about what disabled people might reasonably need. • Disabled people must not be charged for their reasonable adjustments, accessible formats or other adaptations. It is a legal requirement under the Equalities Act to ensure information is accessible to disabled employees and service users. • Disabled people may be over-represented in the cohort given the nature of the service
Mitigations:	<ul style="list-style-type: none"> • Bristol City Council’s Reablement service provides a person-centred approach and so needs related to Disability status will be taken into consideration at all stages. • Co-production activities will take place with relevant disability groups, for example ‘People First’, to ensure the increased service activity continues to be appropriate and relevant for its service-users. • General information and information on updates will be shared regularly, and in accessible formats to ensure an inclusive approach for service-users.
Sex	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • Women are somewhat over-represented as employees in Reablement Services • Nationally the gender pay gap was 15.5% in 2020. This shows the relative pay gap between female and male employees and how the balance of pay is distributed in an organisation irrespective of equal pay for job roles. • Women still bear the majority of caring responsibilities for both children and older relatives. • Women are more likely to be excluded from conversations which affect decision making due to lack of representation in boards / organisational leadership. • Services and workplace requirements may not take into consideration the impact of women’s reproductive life course including menstruation, avoiding pregnancy, pregnancy, childbirth, breastfeeding, and menopause. • Young women between the ages of 16 and 24 have higher risk of common mental health problems and higher rates of self-harm and post-traumatic stress disorder etc. • Bristol female preventable mortality rates are significantly higher than the England rates

	<ul style="list-style-type: none"> Nationally 27% of women experience domestic abuse in their lifetimes. The rate of recorded domestic abuse incidents in Bristol has shown a significant rise over the last two years and 74% of victims were female. Men and boy's health is in general poorer than that of women and girls. Male life expectancy at birth in Bristol is around four years less than for females. On average men in Bristol live 18 years in poor health, women live 22 years in poor health A higher proportion of boys have physical impairments and more boys than girls have diagnosed mental health disorders and learning difficulties. Men in Bristol are more likely than women to have unhealthy lifestyle behaviours including being overweight and obese, smoking, alcohol and substance misuse There are differences between men and women in health practices and the way they use health services Men are three times more likely than women to take their own lives.
Mitigations:	<ul style="list-style-type: none"> Employees: Any recruitment processes will follow usual equality and inclusion due diligence processes including advertising widely. Where appropriate, we will use recruitment as an opportunity to diversify the workforce, so it is more representative for service users. Service-users: Women are over-represented in service-users and so are likely to be disproportionately impacted. Bristol City Council's Reablement service provides a person-centred approach and so needs related to sex will be taken into consideration at all stages.
Sexual orientation	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> Lesbian, gay and bisexual people are statistically more vulnerable to verbal and physical abuse 1 in 5 Lesbian, Gay, Bisexual and Trans (LGBT) staff have been the target of negative comments or conduct from work colleagues in the last year because they're LGBT. More than a third of LGBT staff have hidden or disguised that they're LGBT at work in the last year because they were afraid of discrimination. 1 in 10 Black, Asian and Minority Ethnic LGBT staff have similarly been physically attacked because of their sexual orientation and /or gender identity, compared to 3% of White LGBT staff One in four lesbian and bisexual women have experienced domestic abuse in a relationship, one third of them were abused by a man. Almost half of all gay and bisexual men have experienced at least one incident of domestic abuse from either a family member or a partner since the age of 16. Research shows LGBT people face widespread discrimination in healthcare settings and one in seven LGBT people avoid seeking healthcare for fear of discrimination from staff The Stonewall LGBT in Britain - Health Report shows LGBT people are at greater risk of marginalisation during health crises, and those with multiple marginalised identities can struggle even more. In communications we should signpost and refer where possible to mutual aid and community support networks². Research has shown that LGBT people are more likely to be living with long-term health conditions, are more likely to smoke, and have higher rates of drug and alcohol use.

	<ul style="list-style-type: none"> • Half of LGBT people experienced depression in the last year • 14% of LGBT people have avoided treatment for fear of discrimination because they are LGBT.
Mitigations:	See general comments above
Pregnancy / Maternity	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	
Mitigations:	
Gender reassignment	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	
Mitigations:	
Race	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • Ethnic minorities in Bristol experience greater disadvantage than in England and Wales as a whole in education and employment and this is particularly so for Black African people. • In the last census (2011) 16% of the population belonged to a Black, Asian or minority ethnic group and this is likely to be higher now. • The top three countries of birth outside UK for Bristol residents are Poland, Somalia and India. • Although the race or ethnicity pay gap has narrowed in recent years there are still wide pay differences between particular ethnic groups and most minority ethnic groups earn less on average than White British people. • Bangladeshi, Pakistani, and Black ethnic groups are more likely to live in deprived neighbourhoods; and the same groups and Chinese ethnicities are about twice as likely to live on a low income and experience child poverty compared to White groups • Black, Asian and minority ethnic households are less likely to own their home and more likely to living in overcrowded housing and intergenerational households. Bangladeshi and Pakistani groups are more likely to live in multi-family households. • Black people in the UK are less likely to hold a driving licence and more likely to rely on public transport. • Black Asian and minority ethnic groups in Bristol are more likely to find inaccessible public transport prevents them from leaving their home when they want to • Black African young people are disadvantaged in education compared to their White peers. A disproportionately high percentage of Bristol school pupils from Black, Asian and minority ethnic backgrounds are excluded from school and In Bristol pupils with the lowest 'Attainment 8' scores are from Black ethnic background (highest from Chinese ethnic background.) • Organisations may lack cultural competence because Black, Asian and minority staff are under- represented. • People from Black African, Other, and Black Caribbean groups have persistently high levels of unemployment and almost all ethnic minority groups in Bristol experience employment inequality when compared to White British people.

	<ul style="list-style-type: none"> • Black Asian and minority ethnic groups are more likely to be self-employed than the Bristol average and over-represented in low-income self-employment including taxis, takeaway restaurants. • Black Asian and minority ethnic people are underrepresented in political and civic leadership. • People who do not speak English as a main language may require information in plain English and community language translations or videos etc. • White people are over-represented in the cohort; however, this could be due to existing health disparities in relation to race.
Mitigations:	<ul style="list-style-type: none"> • Bristol City Council's Reablement service provides a person-centred approach and so needs related to race will be taken into consideration at all stages • This could include consideration to personal care needs, food preparation, and translation services if required
Religion or Belief	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	
Mitigations:	
Marriage & civil partnership	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	
Mitigations:	
OTHER RELEVANT CHARACTERISTICS	
Socio-Economic (deprivation)	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • Bristol has 41 areas in the most deprived 10% in England, including 3 in the most deprived 1%. The greatest levels of deprivation are in Hartcliffe & Withywood, Filwood and Lawrence Hill. • In Bristol 15% of residents - 70,800 people - live in the 10% most deprived areas in England, including 19,000 children and 7,800 older people. • 9.8% (approximately 19,572 households) of all households in Bristol are living in fuel poverty (<u>BEIS, 2020</u>) • 4.2% of households have experienced moderate to severe food insecurity, rising to 13% in the most deprived areas of the city (QoL 2020-21) • 25% of people in Bristol are dissatisfied with the way the Council runs things, but this is 43% for people living in the most deprived areas of the city (QoL 2020-21). • The inequalities gap in life expectancy between the most and least deprived areas in Bristol is 9.6 years for men and 7.2 years for women.
Mitigations:	See general comments above
Carers	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • Being a carer can be a huge barrier to accessing services and maintaining employment • We need to consider the timing/availability of services, events etc. to allow flexibility for carers. • As with Disability and Pregnancy and Maternity – policies which aim to restrict driving or parking can have a disproportionate impact on people who are reliant on having their own transport.

	<ul style="list-style-type: none"> • Studies show around 65% of adults have provided unpaid care for a loved one. • Women have a 50% likelihood of being an unpaid carer by the age of 46 (by age 57 for men) • Young carers are often hidden and may not recognise themselves as carers
Mitigations:	See general comments above
Other groups [Please add additional rows below to detail the impact for any other relevant groups as appropriate e.g. asylum seekers and refugees; care experienced; homelessness; armed forces personnel and veterans]	
Potential impacts:	
Mitigations:	

For more information see:

[Support Hub \(ageuk.org.uk\)](http://ageuk.org.uk)

[Bristol Mind - Support types Older people](#)

[Care and support for adults in Bristol](#)

3.2 Does the proposal create any benefits for people based on their protected or other relevant characteristics?

Outline any potential benefits of the proposal and how they can be maximised. Identify how the proposal will support our [Public Sector Equality Duty](#) to:

- ✓ Eliminate unlawful discrimination for a protected group
- ✓ Advance equality of opportunity between people who share a protected characteristic and those who don't
- ✓ Foster good relations between people who share a protected characteristic and those who don't

The overall aim of the work is to increase capacity and use of the Reablement service. Increasing the amount of people the service works with will provide positive outcomes for Bristol Citizens as people will be supported to live more independently and incidences of readmission to hospital will be prevented or reduced.

Step 4: Impact

4.1 How has the equality impact assessment informed or changed the proposal?

What are the main conclusions of this assessment? Use this section to provide an overview of your findings. This summary can be included in decision pathway reports etc.

If you have identified any significant negative impacts which cannot be mitigated, provide a justification showing how the proposal is proportionate, necessary, and appropriate despite this.

Summary of significant negative impacts and how they can be mitigated or justified:

No significant negative impact identified at this stage. Current work may lead to recommendations which if implemented could lead to changes to provision and workforce which would be subject to further detailed equality impact assessment prior to implementation.

Summary of positive impacts / opportunities to promote the Public Sector Equality Duty:

Increasing the amount of people the Reablement service works with increases opportunities across the population for people to maximise their health, wellbeing and independence and remain living in their own homes for longer.

4.2 Action Plan

Use this section to set out any actions you have identified to improve data, mitigate issues, or maximise opportunities etc. If an action is to meet the needs of a particular protected group please specify this.

Improvement / action required	Responsible Officer	Timescale
As part of the PeopleToo work we are reviewing		
Reablement data, maximising opportunities:		
<ul style="list-style-type: none"> How capacity is reported and then interpreted. 		
<ul style="list-style-type: none"> Using data analysis to drive change. 		
<ul style="list-style-type: none"> Maximise no's of people accessing Reablement. 		
<ul style="list-style-type: none"> Target particular internal teams where referrals are low. 		
<ul style="list-style-type: none"> Review of internal processes to support reduction in length of stay on caseload to 21 days. 		


4.3 How will the impact of your proposal and actions be measured?

How will you know if you have been successful? Once the activity has been implemented this equality impact assessment should be periodically reviewed to make sure your changes have been effective your approach is still appropriate.

Referral rates from internal teams will have increased. Reduction in overall length of stay, number of referral declines based on reason: 'lack of capacity' will be significantly reduced.
Effectiveness of service showing care hrs at start of service and at end – savings will be made in reduction of care hrs.

Step 5: Review

The Equality and Inclusion Team need at least five working days to comment and feedback on your EqIA. EqIAs should only be marked as reviewed when they provide sufficient information for decision-makers on the equalities impact of the proposal. Please seek feedback and review from the [Equality and Inclusion Team](#) before requesting sign off from your Director¹.

Equality and Inclusion Team Review: Reviewed by the Equality and Inclusion Team	Director Sign-Off: 
Date: 28/12/2023	Date: 29/12/23

¹ Review by the Equality and Inclusion Team confirms there is sufficient analysis for decision makers to consider the likely equality impacts at this stage. This is not an endorsement or approval of the proposal.

Equality Impact Assessment [version 2.12]



Title: 2425 ASC – 9 S117 Reviews	
<input type="checkbox"/> Policy <input type="checkbox"/> Strategy <input type="checkbox"/> Function <input type="checkbox"/> Service <input checked="" type="checkbox"/> Other [please state] <i>Savings Proposal</i>	<input checked="" type="checkbox"/> New <input type="checkbox"/> Already exists / review <input type="checkbox"/> Changing
Directorate: Adults and Communities	Lead Officer name: Mette Le Jakobsen
Service Area: Adult Social Care	Lead Officer role: Director – Adult Social Care

Step 1: What do we want to do?

The purpose of an Equality Impact Assessment is to assist decision makers in understanding the impact of proposals as part of their duties under the Equality Act 2010. Detailed guidance to support completion can be found here [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#).

This assessment should be started at the beginning of the process by someone with a good knowledge of the proposal and service area, and sufficient influence over the proposal. It is good practice to take a team approach to completing the equality impact assessment. Please contact the [Equality and Inclusion Team](#) early for advice and feedback.

1.1 What are the aims and objectives/purpose of this proposal?

Briefly explain the purpose of the proposal and why it is needed. Describe who it is aimed at and the intended aims / outcomes. Where known also summarise the key actions you plan to undertake. Please use plain English, avoiding jargon and acronyms. Equality Impact Assessments are viewed by a wide range of people including decision-makers and the wider public.

Budget context

Every year, the council must agree an annual budget which balances the money we spend with the money we are expecting to receive. Councils across the country are continuing to face financial challenges and based on our current forecasts, we face a funding gap over the next five years (to 2028/29) of up to £81.2 million dependent on the severity of factors such as inflation, funding changes, and unavoidable service pressures. This is in addition to the £17.7 million of savings and efficiencies proposals for 2024-2028 outlined in the 2023/24 budget and assumed delivery of 2023/24 savings in the current year.

The Council has defined statutory responsibilities, but deliver against a far broader agenda, providing universal services benefiting the whole community, and targeted services aimed at individuals, communities with particular needs, and businesses – administered by our workforce, city partners, stakeholder organisations and commissioned services.

To address these challenges, we are looking across all of our services with a focus on:

- maximising our transformation programmes – where we are looking to improve services whilst achieving the best value for money
- income opportunities – where we are looking to improve our external income and most effectively apply that income
- targeted reviews – where we are looking at services that are comparatively high in cost compared to other councils to see where we can do things differently to reduce costs, be more efficient in how we do things and, in some cases, stop doing some things entirely.

This proposal: Section 117 Reviews

Bristol City Council (BCC) commissioned a strategic partner, Peopletoo to carry out a diagnostic report to identify areas of practice we can do differently to reduce costs and be more efficient. Peopletoo identified 9 key activities which have been developed as key workstreams which includes the need to increase the number of annual care and support reviews for individuals who receive s117 aftercare.

S117 of the Mental Health Act 1983 establishes a duty on Local Authorities and Integrated Care Boards (ICB) to provide aftercare to individuals who have been detained under section 3, 37, 45a, 48, of the Mental Health Act (it also includes individual's subject to Community Treatment Orders). Aftercare includes the provision of social care which is non chargeable, and the duty remains in place for as long as the individual requires the aftercare to reduce the risk of deterioration of their mental disorder and subsequent readmission to hospital. An individual can be discharged from S117 if, following a review, there is an agreement from both a representative of the health and local authorities.

BCC has a current arrangement with Bristol North Somerset and South Gloucestershire Integrated Care Board (BNSSG ICB) who contribute 30% towards the cost of each individuals care and support package (although in some exceptional cases we can negotiate a higher contribution from the ICB). As a result of this arrangement in 22/23 we received £12m contribution towards this cost .

Peopletoo identified that, when benchmarked against equivalent authorities, Bristol City Council are providing care and support to a larger number of individuals - this includes people who are entitled to Section 117 aftercare. Currently in Bristol we provide social care to 680 people under s117 costing just under £34 million per year (this is gross cost of care and includes the 30% contribution from the ICB).

One of Peopletoo's recommendations we are seeking to implement is to increase our reviewing capacity to allow a greater number of care and support reviews of people receiving care and support. These additional reviews will enable us to ensure that the individuals are still entitled to aftercare, that their needs are being met and that any care and support provided is cost effective and represents best value for money.

What is the project?

This project seeks to reduce the number of clients with Section 117 in place who are overdue a review, and to improve independence, and good outcomes following a high-quality strengths-based review.

Why was this identified?

The diagnostic exercise established a high number of people in Section 117, a third of whom had not had a review in over a year and is therefore overdue. Due to the variation in needs over time for people with Section 117 these individuals could be experiencing insufficient support and therefore a strengths-based review is required to ensure care is appropriate and improve outcomes.

What does it seek to achieve?

Due to the workforce shortages in Bristol City Council's Adult Social Care (ASC) Teams, this cannot be quickly implemented with existing capacity. This project therefore focuses on a prioritised approach to reviewing people in receipt of Section 117 funding who are overdue a review and bringing in additional short-term capacity to carry out these reviews. As a result, people will be receiving more appropriate services and their independence will be supported and promoted.

Additional staffing capacity will be sourced using a recruitment business partner to source up to 10 full-time social workers to carry out this targeted review work. Staffing resource has been identified and we plan to begin onboarding new staff due, with a start date of December 2023.

The expectation is that each social worker will carry out approximately 5 reviews a week and focus on individuals who are most overdue a review of s117 care and support. Where possible social workers will review individuals within accommodation-based support as it will allow us to maximise the volume of reviews carried out by reducing travel time and increasing effectiveness.

This additional staffing capacity will initially sit within our Market Analysis Team which has commissioning and contract expertise to ensure that arrangements with supported living and residential care providers who support people with mental health needs are cost effective. Bristol North Somerset and South Gloucestershire Integrated Care Board (BNSSG ICB) have also committed to making additional clinical staff available to support with joint reviews. We are also working with BNSSH and AWP MH Trust to revise our existing S117 protocol and memorandum of understanding.

This EqIA outlines the potential impact this proposal will have on those effected.

1.2 Who will the proposal have the potential to affect?

<input checked="" type="checkbox"/> Bristol City Council workforce	<input checked="" type="checkbox"/> Service users	<input type="checkbox"/> The wider community
<input type="checkbox"/> Commissioned services	<input checked="" type="checkbox"/> City partners / Stakeholder organisations	
Additional comments:		

1.3 Will the proposal have an equality impact?

Could the proposal affect access levels of representation or participation in a service, or does it have the potential to change e.g. quality of life: health, education, or standard of living etc.?

If 'No' explain why you are sure there will be no equality impact, then skip steps 2-4 and request review by Equality and Inclusion Team.

If 'Yes' complete the rest of this assessment, or if you plan to complete the assessment at a later stage please state this clearly here and request review by the Equality and Inclusion Team.

<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	[please select]
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This proposed change will allow increased review capacity so will ensure greater compliance with requirements to regularly review care and support plans for people receiving after care under s117 of the Mental Health Act.

Additional staffing capacity will enable us to carry out these reviews to ensure that the individual's needs are still being met, that they still meet the criteria for S117 aftercare, and that the care and support services represent best value to Bristol City Council and BNSSG ICB.

Step 2: What information do we have?

2.1 What data or evidence is there which tells us who is, or could be affected?

Please use this section to demonstrate an understanding of who could be affected by the proposal. Include general population data where appropriate, and information about people who will be affected with particular reference to protected and other relevant characteristics: [How we measure equality and diversity \(bristol.gov.uk\)](http://bristol.gov.uk)

Use one row for each evidence source and say which characteristic(s) it relates to. You can include a mix of qualitative and quantitative data e.g. from national or local research, available data or previous consultations and engagement activities.

Outline whether there is any over or under representation of equality groups within relevant services - don't forget to benchmark to the local population where appropriate. Links to available data and reports are here [Data, statistics and intelligence \(sharepoint.com\)](#). See also: [Bristol Open Data \(Quality of Life, Census etc.\)](#); [Joint Strategic Needs Assessment \(JSNA\)](#); [Ward Statistical Profiles](#).

For workforce / management of change proposals you will need to look at the diversity of the affected teams using available evidence such as [HR Analytics: Power BI Reports \(sharepoint.com\)](#) which shows the diversity profile of council teams and service areas. Identify any over or under-representation compared with Bristol economically

active citizens for different characteristics. Additional sources of useful workforce evidence include the [Employee Staff Survey Report](#) and [Stress Risk Assessment](#)

Data / Evidence Source [Include a reference where known]	Summary of what this tells us
<p>Power BI - data of current individuals receiving s117 aftercare services [Internal links only]</p> <p>Tier 3 Activity & Cost - Power BI Tier 3 Activity & Cost - Power BI</p> <p>Tier 3 Activity & Cost - Power BI demographic data of individuals currently with s117 aftercare entitlement who are receiving care and support services</p> <p>Tier 3 Activity & Cost - Power BI</p>	<p>The total number of people receiving care and support as part of s117 aftercare as of 6th November 2023 stands at 682. This is an increase of 5.1% in the past 12 months and has risen at a larger rate than those receiving care and support who are not entitled to S117 (2.9% growth).</p> <p>The average weekly cost of care for people on s117 is £957.00. This is significantly higher than the average weekly cost of care for people receiving support under the Care Act (2014) which is £690.00. When compared against individual's receiving support under the Care Act, people in receipt of s117 funding are much more likely to living in residential (20% vs 14%) or supported accommodation (37% vs 10%) and significantly less likely to receive support in their own home (7.5% vs 53%).</p> <p>Demographic data indicates that 75.5% of these individuals are aged between 18 and 64 . This compares to just 46% of individuals receiving care and support who are not entitled to s117 (e.g., under the Care Act).</p> <p>More detailed age breakdown also supports narrative that those receiving care and support under s117 are generally younger than those under Care Act. 16.4% of those receiving s117 are aged 30 to 39 compared to 8.7%, 19.9% of s117 are aged 40 to 49 vs 8.1% and 21.8% s117 are aged 50- 59 compared to 11.8%.</p> <p>In terms of ethnicity there are similar percentages of individuals receiving care under s117 or under the care act who identify as white (75.2% vs 74.5%) but there is a larger proportion of the s117 cohort who identify as Black , African, Caribbean , black British when compared to those who aren't entitled to s117 (13.6% vs 8.8%) . 60% of this s117 cohort are male compared to 44% of those receiving care under the Care Act which shows greater likelihood of this cohort being male.</p> <p>This indicator supports the wider evidence base that black African Caribbean males detained under section of the Mental Health Act (and subsequently entitled to s117 aftercare) are overrepresented in this cohort.</p>
<p>Peopletoo diagnostic work</p>	<p>People too diagnostic report indicated that there is a significant shortfall of funding from Health including Continuing Health Care (CHC), Joint Funding, S117, and Better Care Funding (based on NHS Income Per Capita). Increasing reviews of people on s117</p>

	<p>might identify cases where increased health contribution might be warranted.</p> <p>Diagnostic report also noted that our volume of reviews remains low and need to increase annual volume of referrals.</p> <ul style="list-style-type: none"> • Care and support is provided to 689 clients under S117. • 346 of these clients are overdue a review. • 31% are overdue by 24 months+.
<p>About the Joint Strategic Needs Assessment (JSNA) (bristol.gov.uk)</p>	<p>The Joint Strategic Needs Assessment reports on the health and wellbeing needs of the people of Bristol. It brings together detailed information on local health and wellbeing needs and looks ahead at emerging challenges and projected future needs.</p> <p>The JSNA can help inform decisions about how we design, commission and deliver services, and also about how the urban environment is planned and managed; to improve and protect health and wellbeing outcomes across the city while reducing health inequalities; and to provide partner organisations with information on the changing health and wellbeing needs of Bristol, at a local level, to support better service delivery.</p>
<p>Health and wellbeing strategy (bristol.gov.uk)</p>	<p>The Health and Wellbeing strategy sets out our local health and wellbeing priorities and is based on evidence from our Joint Strategic Health Assessment, ambitions in the One City Plan, and feedback from community engagement. Detailed actions relating to each priority are developed or overseen by the Health and Wellbeing Board at monthly meetings.</p>
<p>Power BI reports on service user and overdue S117 reviews. Tier 3 Activity & Cost - Power BI [Internal link only]</p>	<p>This tells us that 345 people receiving care and support under s117 of the Mental Health Act are overdue a review. This means that around 50.4% of individuals are overdue an annual review which is slightly higher figure than those receiving care not under s117 (46.7%).</p> <p>Of this;</p> <ul style="list-style-type: none"> • 145 people are overdue a review by 0 to 11 months • 93 are overdue a review by 12 to 23 months. • 52 are overdue a review by 24 to 35 months. • 55 are overdue a review by over 36 months. <p>We will use this data to help prioritise our response and allocation of cases to those who have been waiting the longest for the reviews. This means that those receiving care and support under s117 are less likely to have annual reviews and so potentially more</p>

disadvantaged than those not under S117. This workstream will take steps to address this inequity. Power BI data also shows that those receiving care and support are more likely to receive care and support outside of either Bristol or wider BNSSG 10% vs 4% for Care Act.

Bristol One City: Cost of Living Crisis – Bristol’s One City approach to supporting citizens and communities (Oct 2022)

Cost of Living Risk Index (arcgis.com)

The rising cost of living is not impacting on everyone equally. People who are already experiencing inequity and poverty will be disproportionately impacted:

- **People on the lowest incomes** - will have less available income but also pay more for the same services. For example, people unable to pay their bills by Direct Debit and those borrowing money are subject to higher costs and interest rates. This is what anti-poverty campaign group Fair by Design has referred to as a Poverty Premium
- **Parents and young families** – parents of young children are more likely to seek credit and alternative support as they are less able, on average, to afford an unexpected expense. Single parents will be disproportionately affected; and one in four single parents find it difficult to manage financially (28.6%).
- **Disabled people** – just under half of all people in poverty in the UK are Disabled people or someone living with a Disabled person. Disabled people have higher living costs, and tend to pay more for their heating, travel, food/diet, prescription payments, and specialist equipment. It is estimated that UK households that include Disabled children pay on average £600 more for their energy bills than an average household
- **Black and Minoritised people** – A higher proportion of Black and minoritised ethnic groups reported finding it difficult to manage financially (14.9%) in 2021. In 2020 the Social Metrics Commission found that almost half of people living in a family in the UK where the head of the household is Black are in poverty. Age UK report that poverty among older Black and minoritised ethnic groups is twice as high as for white pensioners
- **Underserved populations** - It is likely that populations that are not typically well represented in data and research are likely to also face increased risk from rising cost of living. For example, refugees and asylum seekers, people experiencing homelessness, and Gypsy/Roma/Traveller groups.
- **Cost of Living Risk Index** (October 2022) identified Lawrence Hill, Hartcliffe & Withywood, Filwood, Lockleaze, Ashley,

	<p>Southmead, Easton, Avonmouth & Lawrence Weston, Hillfields and Eastville as neighbourhoods in Bristol more at risk of the impact of the cost-of-living crisis.</p>
<p><u>An evaluation of the Bristol Race Equality Covid-19 Steering Group</u></p> <p><u>Designing a new social reality - Research on the impact of covid-19 on Bristol's VCSE sector and what the future should be – Black Southwest Network 2020</u></p> <p><u>Delivering an inclusive economy post COVID-19</u></p>	<p>Report focusing on how co-production using a One City approach has been used to respond to the disproportionate impact of the Covid-19 pandemic on our marginalized ethnic communities.</p> <p>Local research has highlighted how long-term underinvestment and lack of equity in funding and procurement has eroded the local Voluntary and community sector.</p> <p>Our local partners have conducted research into the ongoing impact of COVID-19 for women and have provided recommendations on what service providers can do to reduce impact further impact.</p>
<p><u>Nomis - Official Labour Market Statistics (nomisweb.co.uk)</u></p> <p><u>Business demography, UK - Office for National Statistics (ons.gov.uk)</u></p>	<p>84% of all people in Bristol are economically active which is higher than nationally (78.6%) and in the Southwest (80.7%). Of those who are economically inactive in Bristol, 29% are 'long-term sick' and 16% are looking after family/home, as well as 9.2% who are retired. The percentage of 'workless households' in Bristol is 12.1%, compared to 13.6% nationally, and the proportion of working aged people who are benefit claimants is 11.2%.</p>
<p><u>Bristol Quality of Life Survey 2021-22</u></p>	<p>The Quality of Life (QoL) survey is an annual randomised sample survey of the Bristol population, mailed to 33,000 households (with online & paper options), and some additional targeting to boost numbers from low responding groups. In brief, the most recent QoL survey indicated that inequality and deprivation continue to affect people's experience in almost every element measured by the survey. The <u>Quality of Life 2021/22 data dashboard</u> highlights those indicators, wards and equality and demographic groups which are better or worse than the Bristol average. For example, there are significant disparities based on people's characteristics and circumstances in the extent to which they find it difficult to manage financially.</p> <p>This QoL dashboard also showed disparities in terms of individual's who reported as being in good health. Just 33.5% of Disabled people answered yes to this question, and just 59.8% of Trans people voted also yes. 73.6% of people in the most deprived wards responded yes to this question compared to 83.1% Bristol average.</p>
<p>Bristol 2021 Census Data profiles Microsoft Power BI</p>	<p>The Census details the demographic profile of Bristol. We have had initial data on the population of Bristol by age, ethnic group, national identity, language, and religion.</p>

<p><u>The population of Bristol</u></p> <p><u>Bristol Key Facts 2022</u></p>	<p>Updated annually. The report brings together statistics on the current estimated population of Bristol, recent trends in population, future projections and looks at the key characteristics of the people living in Bristol.</p>
<p>Additional comments:</p>	

2.2 Do you currently monitor relevant activity by the following protected characteristics?

<input checked="" type="checkbox"/> Age	<input checked="" type="checkbox"/> Disability	<input checked="" type="checkbox"/> Gender Reassignment
<input checked="" type="checkbox"/> Marriage and Civil Partnership	<input checked="" type="checkbox"/> Pregnancy/Maternity	<input checked="" type="checkbox"/> Race
<input checked="" type="checkbox"/> Religion or Belief	<input checked="" type="checkbox"/> Sex	<input checked="" type="checkbox"/> Sexual Orientation

2.3 Are there any gaps in the evidence base?

Where there are gaps in the evidence, or you don't have enough information about some equality groups, include an equality action to find out in section 4.2 below. This doesn't mean that you can't complete the assessment without the information, but you need to follow up the action and if necessary, review the assessment later. If you are unable to fill in the gaps, then state this clearly with a justification.

For workforce related proposals all relevant characteristics may not be included in HR diversity reporting (e.g., pregnancy/maternity). For smaller teams diversity data may be redacted. A high proportion of not known/not disclosed may require an action to address under-reporting.

Although our corporate approach is to collect diversity monitoring for all relevant characteristics, there are gaps in the available local diversity data for some characteristics, especially where this has not always historically been included in census and statutory reporting e.g., for sexual orientation. We also know there are some under-reporting gaps in our workforce diversity information - where personal and confidential information is voluntarily requested from staff.

There are some reporting gaps in our recording of service users' equalities data where this is not recorded or unknown (around 10%) for most categories. Our Power BI report currently only reports on sex, ethnicity, age and religion and does not report on gender reassignment or sexual orientation.

In terms of future demand more information is required about makeup of adults and young people with emerging mental health needs who may end up being detained under MHA Act and requiring social care support. The local Mental Health NHS Trust (AWP), BNSSG ICB and Primary Care will all hold various information on such individuals with such emerging or current MH needs, if we were able to access and analyse such data further it could be used to inform future demand of individuals who might require care and support from Bristol ASC as aftercare and plan our assessment and review capacity for the future.

Existing information held by AWP on people currently detained under MHA will also inform future demand on s117 social care cohort as a significant proportion of these individuals will require social care intervention. More work is required in order to hear the voice of the individual with lived expertise who draws on care and support under S117 and their experience of receiving aftercare and what a good review looks like.

2.4 How have you involved communities and groups that could be affected?

You will nearly always need to involve and consult with internal and external stakeholders during your assessment. The extent of the engagement will depend on the nature of the proposal or change. This should usually include individuals and groups representing different relevant protected characteristics. Please include details of any completed engagement and consultation and how representative this had been of Bristol's diverse communities.

Include the main findings of any engagement and consultation in Section 2.1 above.

If you are managing a workforce change process or restructure please refer to [Managing a change process or restructure \(sharepoint.com\)](#) for advice on consulting with employees etc. Relevant stakeholders for engagement about workforce changes may include e.g. staff-led groups, trade unions as well as affected staff.

We launched a public consultation on our budget proposals between 9th December and 21st December This consultation set out all the savings proposals we had identified to produce a balanced budget in the context of reduced available funding and increasing financial pressures.

We have discussed our proposals for increasing S117 reviews with BNSSG ICB and will meet with them to discuss whether they can provide additional clinical staff to support with some of these additional reviews. We are also working with social care leads in AWP (MH NHS trust) as we recognise that existing s117 protocol across the NHS trust needs updating and this can help support this work.

2.5 How will engagement with stakeholders continue?

Explain how you will continue to engage with stakeholders throughout the course of planning and delivery. Please describe where more engagement and consultation is required and set out how you intend to undertake it. Include any targeted work to seek the views of under-represented groups. If you do not intend to undertake it, please set out your justification. You can ask the Equality and Inclusion Team for help in targeting particular groups.

All responses to the Budget Consultation will be analysed and included in the Council's Budget report that will be published on the Bristol City Council website in early 2023. We will take Budget consultation responses into account when developing this and other final proposals to put to the Cabinet and a meeting of the Full Council for approval. The final decision will be taken by Full Council at its budget setting meeting in February / March 2024.

Following the setting of the overall budget envelope there will be extensive engagement, consultation and co-design with affected communities on particular proposals which will inform future decision making prior to implementation. Our approach to public engagement and consultation will proactively target under-represented respondents to increase the participation of people from equality groups and their local representative organisations. This will help to ensure that our services and actions are informed by the views and needs of all our citizens.

The outcomes of the additional S117 reviews will be shared with the BNSSG ICB and where necessary the local MH NHS trust (AWP although might differ if the individual is living outside of AWP footprint). We will use this additional reviewing capacity to help inform best practice for S117 reviews and help develop an up-to-date effective multi-agency protocol to support best practice for reviews.

Step 3: Who might the proposal impact?

Analysis of impacts must be rigorous. Please demonstrate your analysis of any impacts of the proposal in this section, referring to evidence you have gathered above and the characteristics protected by the Equality Act 2010. Also include details of existing issues for particular groups that you are aware of and are seeking to address or mitigate through this proposal. See detailed guidance documents for advice on identifying potential impacts etc. [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#)

3.1 Does the proposal have any potentially adverse impacts on people based on their protected or other relevant characteristics?

Consider sub-categories and how people with combined characteristics (e.g. young women) might have particular needs or experience particular kinds of disadvantage.

Where mitigations indicate a follow-on action, include this in the 'Action Plan' Section 4.2 below.

GENERAL COMMENTS (highlight any potential issues that might impact all or many groups)

Even when we plan to consult in more detail on specific service delivery proposals at a later time, we must ensure that any budget setting decisions that are likely to affect future services are informed by sufficient consultation and proper analysis. This is so that decision makers can have due regard to any likely disproportionate or negative

impact on the basis of their protected and other relevant characteristics at the time the budget is approved – not afterwards¹.

Decision makers will have the ability to make changes to the individual spending plans following further consultation as appropriate and detailed evaluation of the impact of specific proposals. Within the proposed budget envelope there will be financial mitigation put aside for any non-delivery or amendments to proposals which may occur due to future consideration of equalities issues or other factors.

As well as identifying whether budget changes will have a disproportionate impact on particular groups (e.g., because they are over-represented in a particular cohort), we need to pay particular attention to the risk of indirect discrimination: when an apparently neutral decision puts members of a given group at a particular disadvantage compared with other people because of their different needs and circumstances.

We are also aware of existing structural inequalities and particular considerations, issues, and disparities for people in Bristol based on their characteristics, which we will take into account.

With all individuals who will receive annual care and support review of s117 as part of this project our social work staff will take an individualized, personalized, strength-based approach to carrying out these reviews, to ensure their voice and wishes are heard, and their identified outcomes met. We will also work closely with the provider and commissioners to ensure that care and support provided represents best value for money.

PROTECTED CHARACTERISTICS

Age: Young People	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • Young people are often under-represented in engagement and consultation in Bristol and are less satisfied than average with the way the council runs things. • Children and young people in Bristol are considerably more ethnically diverse than the overall population of Bristol. • Children and young people from the most deprived areas of Bristol have the poorest outcomes in health and education in terms of health, education and future employment etc. • Young people in Bristol are more likely to: <ul style="list-style-type: none"> ○ have poor emotional health and wellbeing ○ find inaccessible public transport prevents them from leaving their home when they want to ○ 6.8% of 16–17-year-olds (2020/21) were “not in education, employment or training” (NEET), worse than the national average (5.5%) • Young adults are most likely to have lost work or seen their income drop because of COVID-19 and the cost-of-living crisis
Mitigations:	<p>We will be taking a strengths-based approach that will ensure that young people have a voice and are provided with different opportunities that maximise their well-being and independence. We will continue to apply the wellbeing principle as enshrined in ‘The Care Act’ when considering how we meet the needs of service users.</p> <p>Any decisions around meeting needs of younger Disabled people will need to ensure we consider their wellbeing and clearly evidence how any provision of care and support services promotes their wellbeing and doesn’t impact on their Human Rights. Any decisions will be made on an individual, case by case basis.</p>
Age: Older People	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • Older people in Bristol are: <ul style="list-style-type: none"> ○ less likely to be comfortable using digital services ○ more reliant on public and community transport ○ more likely to be an unpaid carer ○ more likely to help out or volunteer in their community ○ less likely to have formal qualifications

	<ul style="list-style-type: none"> • Bristol Ageing Better estimated at least 11,000 older people are experiencing isolation in the city. • We must factor aging and the needs of older people into long term budgeting and service design
Mitigations:	Through taking a strengths-based approach to the way we work with people; we need to ensure that older people are in control of their care and support and are enabled to access alternative support options with any support they need. If we are using digital technology as an alternative way of providing support, we must ensure that this is appropriate and that they are enabled to use it safely and effectively and that it supports their independence. When carrying out reviews with older people with subject to s117 we will ensure that adult care staff consider needs on a case-by-case basis and ensure we promote wellbeing.
Disability	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • All of those receiving care and support under s117 will have an identified serious mental illness which would be considered a disability. All individuals within the scope of this increase of reviews project would be considered as having a disability. <p>National and local disability data</p> <ul style="list-style-type: none"> • 17% of Bristol's population are disabled. There are more disabled women than men living in Bristol. • In 2021, the disability pay gap was 13.8% with disabled employees earning a median of £12.10 per hour and non-disabled employees a median of £14.03 per hour. • Disabled people are less likely to be employed in a managerial or professional occupation • the national disability employment rate was 52.7% in Q2 2021, compared to 81.0% for non-disabled people. • Disabled workers move out of work at nearly twice the rate (8.8%) of non-disabled workers (4.9%). Workless disabled people move into work at nearly one-third of the rate (11.0%) of workless non-disabled people (26.9%) • Disability increases with age: 4.1% of all children, for the working age population it increases to 12.3% and for people aged 65 and over it increases to 55.9%. • Disabled people on average have lower qualification levels than the population as a whole. • A higher proportion of disabled people rent from a social provider (local authority or housing association) • Disabled people have lower car ownership levels • Disabled people experience higher rates of hate crime and domestic abuse compared to the general population • Disabled people should be empowered to make independent living choices and have a say in access to service provision.
Mitigations:	<p>We will ensure that people are supported fairly and that their needs and preferences are considered. We will seek to fully involve individual in the assessment and support plan process, if the individual requires, or is entitled to an advocate then we will ensure this is arranged. Where appropriate we will seek specialist mental health clinician input to support with the annual review.</p> <p>Any changes to an individual's needs of personal budget will also need to be validated and agreed by a local authority representative and a representative of the ICB.</p>
Sex	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • 60% of those in receipt of s117 funding are men meaning that men are over-represented in the cohort

	<ul style="list-style-type: none"> • Young women between the ages of 16 and 24 have higher risk of common mental health problems and higher rates of self-harm and post-traumatic stress disorder etc. • Bristol female preventable mortality rates are significantly higher than the England rates • Men and boy's health is in general poorer than that of women and girl's • Male life expectancy at birth in Bristol is around four years less than for females. • On average men in Bristol live 18 years in poor health, women live 22 years in poor health • A higher proportion of boys have physical impairments and more boys than girls have diagnosed mental health disorders and learning difficulties. • Men in Bristol are more likely than women to have unhealthy lifestyle behaviours including being overweight and obese, smoking, alcohol and substance misuse • There are differences between men and women in health practices and the way they use health services • Men are three times more likely than women to take their own lives. • Individuals in receipt of s117 support may not be provided with care and support from a carer of their preferred gender
Mitigations:	As part of this review, we will work with each individual to consider their needs and circumstances, including related to their gender. This could include working with care homes and care providers to ensure preference around gender of provider of personal care is considered and respected.
Sexual orientation	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • Lesbian, gay and bisexual people are statistically more vulnerable to verbal and physical abuse • 1 in 10 Black, Asian and Minority Ethnic LGBT staff have similarly been physically attacked because of their sexual orientation and /or gender identity, compared to 3% of White LGBT staff • Research shows LGBT people face widespread discrimination in healthcare settings and one in seven LGBT people avoid seeking healthcare for fear of discrimination from staff • The Stonewall <u>LGBT in Britain - Health Report</u> shows LGBT people are at greater risk of marginalisation during health crises, and those with multiple marginalised identities can struggle even more. In communications we should signpost and refer where possible to mutual aid and community support networks? • Research has shown that LGBT people are more likely to be living with long-term health conditions, are more likely to smoke, and have higher rates of drug and alcohol use. • Half of LGBT people experienced depression in the last year • 14% of LGBT people have avoided treatment for fear of discrimination because they are LGBT.
Mitigations:	As part of this review, we will work with each individual to consider their individual needs and circumstances including related their sexual orientation. We will ensure that people are supported fairly and that their needs and preferences are considered. We will seek to fully involve individual in the assessment and support plan process.
Pregnancy / Maternity	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	
Mitigations:	

Gender reassignment	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	
Mitigations:	
Race	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • Black men are over-represented in the mental health system and more likely to be detained under the 'Mental Health Act' and consequently entitled to S117 aftercare than white people. • Ethnic minorities in Bristol experience greater disadvantage than in England and Wales as a whole in education and employment and this is particularly so for Black African people². • In the last census (2011) 16% of the population belonged to a Black, Asian or minority ethnic group and this is likely to be higher now. • Bangladeshi, Pakistani, and Black ethnic groups are more likely to live in deprived neighbourhoods; and the same groups and Chinese ethnicities are about twice as likely to live on a low income and experience child poverty compared to White groups • Organisations may lack cultural competence because minoritised ethnic staff are under-represented. • People who do not speak English as a main language may require information in plain English and community language translations or videos
Mitigations:	We will ensure that we work alongside people in a person-centred and strengths-based way and consider how their ethnicity may impact on the care and support they need or prefer. We will ensure that we work with VCSE partners and care providers who focus on supporting people from Black, Asian and minoritised ethnic communities to ensure that we understand the needs of the communities they work with and are able to provide this. Where possible these reviews will be done jointly with appropriate clinician from health to ensure the health components of individuals aftercare needs are still being met.
Religion or Belief	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • There are at least 45 religions represented in Bristol. Approximately 1 in 20 people in Bristol are Muslim, and Islam is the second religion in Bristol after Christianity • Budget proposals should take into account differing needs because of people's religion and belief (for example different requirements around diet, life events, and holidays) • Having a designated multi-faith room can make environments such as workplaces and shopping centres is more accessible and friendly for people from faith groups where regular prayer is required. • There is a risk that as part of this review work this could result in reduction of support around meeting specific needs related to religion. For example, a care home environment might not enable an individual to attend religious ceremonies or services or support dietary requirements based on religion, e.g., halal or kosher food. This could also include closer proximity to those of the opposite sex in certain scenario such as personal care. • There is a risk care and support needs associated with religion may not be being met due to cost or lack of availability or appropriate knowledge
Mitigations:	Each case will be considered on a case-by-case basis and a Social Worker will need to demonstrate that needs relating to religion will be considered as part of the review and work with providers to ensure that all identified needs are met. This might include ensuring that specific religious needs around accessing places of worship, appropriate dietary needs and proximity to those of opposite sex are considered and met as part of the reviewed support plan.
Marriage & civil partnership	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	

Mitigations:	
OTHER RELEVANT CHARACTERISTICS	
Socio-Economic (deprivation)	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> Bristol has 41 areas in the most deprived 10% in England, including 3 in the most deprived 1%. The greatest levels of deprivation are in Hartcliffe & Withywood, Filwood and Lawrence Hill. In Bristol 15% of residents - 70,800 people - live in the 10% most deprived areas in England, including 19,000 children and 7,800 older people. The inequalities gap in life expectancy between the most and least deprived areas in Bristol is 9.9 years for men and 6.7 years for women. There is a risk that people living in the most deprived areas who draw on ASC under S117 care and support the most are not provided with enough support due to ongoing budget pressures.
Mitigations:	These factors will need to be considered at every review with each individual on case-by-case basis. As part of the reviews social workers will need to work with the individual, provider and their support network to ensure their income is maximised around welfare benefits, opportunities to access employment is promoted and access to good quality housing, primary health care, educational opportunities, meaningful occupation and health promotion options.
Carers	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> Being a carer can be a huge barrier to accessing services and maintaining employment Studies show around 65% of adults have provided unpaid care for a loved one. Women have a 50% likelihood of being an unpaid carer by the age of 46 (by age 57 for men) Young carers are often hidden and may not recognise themselves as carers.
Mitigations:	Most individuals receiving care and support under s117 live in some kind of accommodation-based support so this should minimise impact on carers. When carrying out annual care and support review, practitioners will ensure that where a carer is identified they are offered a carer's assessment, and relevant care and support to sustain carer's role is explored and offered.
Other groups [Please add additional rows below to detail the impact for any other relevant groups as appropriate e.g., asylum seekers and refugees; care experienced; homelessness; armed forces personnel and veterans]	
Potential impacts:	
Mitigations:	

3.2 Does the proposal create any benefits for people based on their protected or other relevant characteristics?

Outline any potential benefits of the proposal and how they can be maximised. Identify how the proposal will support our [Public Sector Equality Duty](#) to:

- ✓ Eliminate unlawful discrimination for a protected group
- ✓ Advance equality of opportunity between people who share a protected characteristic and those who don't
- ✓ Foster good relations between people who share a protected characteristic and those who don't

The specific benefit is that this work will increase the number and percentage of current individual's receiving care and support under s117 who a review will have to ensure their needs continue to be met, and enable changes to be made to care and support packages where required

The scale of the potential gap in our core funding means that there is very limited opportunity to bring genuine additional benefit to equalities groups in the circumstances. However, we have considered as far as possible the need to: eliminate discrimination, harassment, victimisation and any other conduct prohibited under the Equality

Act 2010; advance equality of opportunity between people from different groups; and foster good relations between people from different groups.

Our budget savings proposals are aligned to our Corporate Strategy and although we have limited resources our future focus will be on achieving those priorities, we have identified including tackling poverty and intergenerational inequality.

Step 4: Impact

4.1 How has the equality impact assessment informed or changed the proposal?

What are the main conclusions of this assessment? Use this section to provide an overview of your findings. This summary can be included in decision pathway reports etc.

If you have identified any significant negative impacts which cannot be mitigated, provide a justification showing how the proposal is proportionate, necessary, and appropriate despite this.

Summary of significant negative impacts and how they can be mitigated or justified:

People who draw on care and support services are more likely to be disproportionately impacted on the basis of disability and age, as well as other protected characteristics which may be over-represented in the cohort. It is therefore essential that we assess people individually, in a strengths-based way to ensure that people do not experience any negative impact of any reduction in support. We will address this through ensuring that we work alongside people when we undertake reviews with a strengths-based approach which considers the impact of any protected characteristics on their lives. All decisions regarding funding will be made on a person-centred basis, informed by a proper understanding of the specific needs of an individual and ensuring that individuals' Human Rights Act are not breached.

Summary of positive impacts / opportunities to promote the Public Sector Equality Duty:

This EqIA has identified that people receiving s117 are less likely to have had an annual review and more likely to live outside of Bristol, North Somerset or South Gloucestershire. Providing additional reviewing capacity should enable us to address both these gaps. This work will enable best value of local authority and health resources by carrying out reviews using our Market Analysis Team approach.

4.2 Action Plan

Use this section to set out any actions you have identified to improve data, mitigate issues, or maximise opportunities etc. If an action is to meet the needs of a particular protected group please specify this.

Improvement / action required	Responsible Officer	Timescale
Update and develop multi agency S117 protocol with reps from BCC adult care, BNSSG ICB and AWP MH Trust. Will also need to draw on people with lived expertise to work towards co-production.	Jamie Mahood	March 2024

4.3 How will the impact of your proposal and actions be measured?


How will you know if you have been successful? Once the activity has been implemented this equality impact assessment should be periodically reviewed to make sure your changes have been effective your approach is still appropriate.

We will monitor equalities data in relation to people who receive S117 to ensure there is not any adverse impact on any particular group. This will include reviewing volume, outcome of reviews and impact on service users and wider workforce.

We will monitor the outcome of all the additional S117 reviews to see what changes have been made to individual support plans, their personal budget and health provision. We will also monitor to see if any changes to no of individuals discharged from s117 following review.

Step 5: Review

The Equality and Inclusion Team need at least five working days to comment and feedback on your EqIA. EqIAs should only be marked as reviewed when they provide sufficient information for decision-makers on the equalities impact of the proposal. Please seek feedback and review from the [Equality and Inclusion Team](#) before requesting sign off from your Director¹.

Equality and Inclusion Team Review: The Equality and Inclusion Team	Director Sign-Off: 
Date: 08/12/2023	Date: 29/12/23

¹ Review by the Equality and Inclusion Team confirms there is sufficient analysis for decision makers to consider the likely equality impacts at this stage. This is not an endorsement or approval of the proposal.

Equality Impact Assessment [version 2.10]



Title: GAP32: Annual Leave Top Up Scheme	
<input checked="" type="checkbox"/> Budget Proposal	<input type="checkbox"/> New <input checked="" type="checkbox"/> Already exists / review <input type="checkbox"/> Changing
Directorate: Resources	Lead Officer name: Steph Griffin
Service Area: HR	Lead Officer role: Director Workforce & Change

Step 1: What do we want to do?

The purpose of an Equality Impact Assessment is to assist decision makers in understanding the impact of proposals as part of their duties under the Equality Act 2010. Detailed guidance to support completion can be found here [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#).

This assessment should be started at the beginning of the process by someone with a good knowledge of the proposal and service area, and sufficient influence over the proposal. It is good practice to take a team approach to completing the equality impact assessment. Please contact the [Equality and Inclusion Team](#) early for advice and feedback.

1.1 What are the aims and objectives/purpose of this proposal?

Briefly explain the purpose of the proposal and why it is needed. Describe who it is aimed at and the intended aims / outcomes. Where known also summarise the key actions you plan to undertake. Please use [plain English](#), avoiding jargon and acronyms. Equality Impact Assessments are viewed by a wide range of people including decision-makers and the wider public.

Budget context

Every year, the council must agree an annual budget which balances the money we spend with the money we are expecting to receive. Councils across the country are continuing to face financial challenges and based on our current forecasts, we face a funding gap over the next five years (to 2028/29) of up to £81.2 million dependent on the severity of factors such as inflation, funding changes, and unavoidable service pressures. This is in addition to the £17.7 million of savings and efficiencies proposals for 2024-2028 outlined in the 2023/24 budget and assumed delivery of 2023/24 savings in the current year.

The Council has defined statutory responsibilities, but deliver against a far broader agenda, providing universal services benefiting the whole community, and targeted services aimed at individuals, communities with particular needs, and businesses – administered by our workforce, city partners, stakeholder organisations and commissioned services.

To address these challenges we are looking across all of our services with a focus on:

- maximising our transformation programmes – where we are looking to improve services whilst achieving the best value for money
- income opportunities – where we are looking to improve our external income and most effectively apply that income
- targeted reviews – where we are looking at services that are comparatively high in cost compared to other councils to see where we can do things differently to reduce costs, be more efficient in how we do things and, in some cases, stop doing some things entirely.

This proposal:

Annual Leave Top Up Scheme

The council already offers its workforce to purchase additional leave on top of their annual entitlement (Annual Leave Top Up scheme) each year, to a maximum of 148 additional hours (pro-rata for part time staff). This is operated as a salary-sacrifice scheme.

In previous years, a second round of the scheme has sometimes been run within the annual maximum of 148 hours additional leave (pro-rata). This offers staff the flexibility to take up the offer at a later stage in the year, or an opportunity to purchase additional leave up to the maximum allowance if they did not purchase the maximum in the first round.

Under this proposal we propose to offer a second round every year.

1.2 Who will the proposal have the potential to affect?

<input checked="" type="checkbox"/> Bristol City Council workforce	<input type="checkbox"/> Service users	<input type="checkbox"/> The wider community
<input type="checkbox"/> Commissioned services	<input type="checkbox"/> City partners / Stakeholder organisations	
Additional comments:		

1.3 Will the proposal have an equality impact?

Yes **No** [please select]

Could the proposal affect access levels of representation or participation in a service, or does it have the potential to change e.g. quality of life: health, education, or standard of living etc.?

If 'No' explain why you are sure there will be no equality impact, then skip steps 2-4 and request review by Equality and Inclusion Team.

If 'Yes' complete the rest of this assessment, or if you plan to complete the assessment at a later stage please state this clearly here and request review by the Equality and Inclusion Team.

Step 2: What information do we have?

2.1 What data or evidence is there which tells us who is, or could be affected?

Please use this section to demonstrate an understanding of who could be affected by the proposal. Include general population data where appropriate, and information about people who will be affected with particular reference to protected and other relevant characteristics: [How we measure equality and diversity \(bristol.gov.uk\)](http://bristol.gov.uk)

Use one row for each evidence source and say which characteristic(s) it relates to. You can include a mix of qualitative and quantitative data e.g. from national or local research, available data or previous consultations and engagement activities.

Outline whether there is any over or under representation of equality groups within relevant services - don't forget to benchmark to the local population where appropriate. Links to available data and reports are here [Data, statistics and intelligence \(sharepoint.com\)](http://sharepoint.com). See also: [Bristol Open Data \(Quality of Life, Census etc.\)](#); [Joint Strategic Needs Assessment \(JSNA\)](#); [Ward Statistical Profiles](#).

For workforce / management of change proposals you will need to look at the diversity of the affected teams using available evidence such as [HR Analytics: Power BI Reports \(sharepoint.com\)](#) which shows the diversity profile of council teams and service areas. Identify any over or under-representation compared with Bristol economically active citizens for different characteristics. Additional sources of useful workforce evidence include the [Employee Staff Survey Report](#) and [Stress Risk Assessment Form](#)

Data / Evidence Source [Include a reference where known]	Summary of what this tells us												
Census 2021	The Census details the demographic profile of Bristol.												
The population of Bristol Bristol Key Facts 2022	<p>Updated annually. The report brings together statistics on the current estimated population of Bristol, recent trends in population, future projections and looks at the key characteristics of the people living in Bristol.</p> <p>Population Profiles for Equalities Groups bring together detailed analysis looking at equalities groups and how they differ in relation to age, health, employment, education and housing, and maps the distribution of equalities groups across the city.</p>												
Ward profile data (bristol.gov.uk)	The Ward Profiles provide a range of data-sets, including population, life expectancy, health and education disparities etc. for each of Bristol’s electoral wards.												
Bristol Quality of Life Survey 2021-22	<p>The Quality of Life (QoL) survey is an annual randomised sample survey of the Bristol population, mailed to 33,000 households (with online & paper options), and some additional targeting to boost numbers from low responding groups. In brief, the most recent QoL survey indicated that inequality and deprivation continue to affect people’s experience in almost every element measured by the survey.</p> <p>The Quality of Life 2021/22 data dashboard highlights those indicators, wards and equality and demographic groups which are better or worse than the Bristol average.</p> <p>For example there are significant disparities based on people’s characteristics and circumstances in the extent to which they find it difficult to manage financially:</p> <table border="1" data-bbox="655 1765 1501 2092"> <thead> <tr> <th data-bbox="655 1765 975 1854">Quality of Life Indicator</th> <th data-bbox="978 1765 1501 1854">% who find it difficult to manage financially</th> </tr> </thead> <tbody> <tr> <td data-bbox="655 1859 975 1904">16 to 24 years</td> <td data-bbox="978 1859 1501 1904">12.5</td> </tr> <tr> <td data-bbox="655 1908 975 1953">50 years and older</td> <td data-bbox="978 1908 1501 1953">6.7</td> </tr> <tr> <td data-bbox="655 1957 975 2002">65 years and older</td> <td data-bbox="978 1957 1501 2002">3.2</td> </tr> <tr> <td data-bbox="655 2007 975 2051">Female</td> <td data-bbox="978 2007 1501 2051">8.6</td> </tr> <tr> <td data-bbox="655 2056 975 2092">Male</td> <td data-bbox="978 2056 1501 2092">8.5</td> </tr> </tbody> </table>	Quality of Life Indicator	% who find it difficult to manage financially	16 to 24 years	12.5	50 years and older	6.7	65 years and older	3.2	Female	8.6	Male	8.5
Quality of Life Indicator	% who find it difficult to manage financially												
16 to 24 years	12.5												
50 years and older	6.7												
65 years and older	3.2												
Female	8.6												
Male	8.5												

Disabled	21.6
Asian /Asian British	9.9
Black/Black British	19.8
Mixed/Multiple Ethnicity	16.3
White British	7.8
White Minority Ethnic	8.4
Lesbian Gay or Bisexual	12.7
No Religion or Faith	8.0
Christian Religion	8.3
Other Religions	18.2
Carer	10.7
Full Time Carer	14.0
Part Time Carer	9.7
Single Parent	28.6
Two Parent	9.6
Parent (all)	12.0
No Qualifications	10.0
Non-Degree Qualified	12.9
Degree Qualified	6.7
Rented (Council)	20.3
Rented (HA)	20.6
Rented (Private)	14.6
Owner Occupier	4.6
Most Deprived 10%	18.8
Bristol Average	8.7

[Joint Strategic Needs Assessment \(JSNA\)](#)

The Joint Strategic Needs Assessment reports on the health and wellbeing needs of the people of Bristol. It brings together detailed information on local health and wellbeing needs and looks ahead at emerging challenges and projected future needs. The JSNA is used to provide a comprehensive picture of the health and wellbeing needs of Bristol (now and in the future); to inform decisions about how we design, commission and deliver services, and also about how the urban environment is planned and managed; to improve and protect health and wellbeing outcomes across the city while reducing health inequalities; and to provide partner organisations with information on the changing health and wellbeing needs of Bristol, at a local level, to support better service delivery.

[HR Analytics: Power BI reports \(sharepoint.com\)](#) [internal link only]

The Workforce Diversity Report shows Bristol City Council Workforce Diversity statistics for Headcount, Sickness, Starters and Leavers data. The report is updated once a month with data as at the end of the previous month. It excludes data for locally

[Equality and Inclusion annual progress report 2021-22 \(bristol.gov.uk\)](https://www.bristol.gov.uk/equality-and-inclusion-annual-progress-report-2021-22)

Appendix – Workforce Diversity Data – summary analysis

Additional sources of useful workforce evidence include the [Employee Staff Survey Report](#) and [Stress Risk Assessment Form](#) completed by individuals and teams [internal links only]

managed schools/nurseries, councillors, casual, seasonal and external agency employees. The report is based on the sensitive information that staff add to Employee Self Service on iTrent (ESS).

Summary of Bristol City Council workforce diversity

	BCC headcount % (19 Nov 2023)	Bristol Working Age Population (16-64)
Age 16-29	11.9%	39.0%
Age 30-39	21.9%	24.0%
Age 40-49	25.2%	16.0%
Age 50-64	41.2%	21.0%
Disabled	8.5%	12%
Asian / Asian British	2.9%	5.8%
Black / Black British	5.1%	5.3%
Mixed ethnicity	3.5%	2.9%
Other ethnic groups	1.7%	1.0%
White	77.2%	85.0%
Female	61.3%	49.1%
Male	38.7%	50.9%
Use another gender term	0.2%	-
Christian	25.2%	43.5%
Other religion/belief	18.2%	7.4%
No religion/belief	32.2%	41.5%
Lesbian, Gay or Bisexual	6.4%	9.1%
Trans	0.2%	-

[Nomis - Official Labour Market Statistics \(nomisweb.co.uk\)](https://www.nomisweb.co.uk/)

[Business demography, UK - Office for National Statistics \(ons.gov.uk\)](https://www.ons.gov.uk/business-demography)

84% of all people in Bristol are economically active which is higher than nationally (78.6%) and in the South West (80.7%). Of economically active people in Bristol 6.9% are self-employed, compared to 9.5% nationally. Of those who are economically inactive in Bristol, 33% are Students, 29% are 'long-term sick' and 16% are looking after family/home, as well as 9.2% who are retired. The percentage of 'workless households' in Bristol is 12.1%, compared to 13.6% nationally, and the proportion of working age people who are benefit claimants is 11.2%. Bristol has a higher proportion of people working in 'professional occupations' (36.2) than for the South West (24.4%) and nationally (25.8%).

In 2020 (most recent data) the South West continued to have the highest five-year 'survival rate' in the UK of businesses that survived into 2020 (this has been the case since 2012). The largest proportion of these surviving businesses, 22%, was in the professional, scientific and technical industry.

Bristol One City: Cost of Living Crisis –
Bristol’s One City approach to
supporting citizens and communities
(Oct 2022)

The rising cost of living is not impacting on everyone equally. People who are already experiencing inequity and poverty will be disproportionately impacted:

- **People on the lowest incomes** - will have less available income but also pay more for the same services. For example, people unable to pay their bills by Direct Debit and those borrowing money are subject to higher costs and interest rates. This is what anti-poverty campaign group Fair by Design has referred to as a Poverty Premium
- **Households with pre-payment energy meters** - households with pre-payment meters often pay above-average costs for their fuel. They will face a significant rise in their monthly bills in autumn and winter with increased energy usage as they do not benefit from the “smoothing” effect of Direct Debits, which spread usage costs evenly across the year
- **Parents and young families** – parents of young children are more likely to seek credit and alternative support as they are less able, on average, to afford an unexpected expense. Single parents will be disproportionately affected; and one in four single parents find it difficult to manage financially (28.6%).
- **Disabled people** – just under half of all people in poverty in the UK are Disabled people or someone living with a Disabled person. Disabled people have higher living costs, and tend to pay more for their heating, travel, food/diet, prescription payments, and specialist equipment. It is estimated that UK households that include Disabled children pay on average £600 more for their energy bills than an average household
- **Black and Minoritised people** – A higher proportion of Black and minoritised ethnic groups reported finding it difficult to manage financially (14.9%) in 2021. In 2020 the Social Metrics Commission found that almost half of people living in a family in the UK where the head of the household is Black are in poverty. Age UK report that poverty among older Black and minoritised ethnic groups is twice as high as for white pensioners
- **People in rented accommodation** – it is estimated that 69% of low-income private renters in England will be forced to go without food and heating at least one day per week to meet rising housing and living cost. Almost three in ten homes in Bristol are privately rented
- **Underserved populations** - It is likely that populations that are not typically well represented in data and research are likely to also face increased risk from rising cost of living. For example, refugees and asylum seekers, people experiencing homelessness, and Gypsy/Roma/Traveller groups.

<p><u>An evaluation of the Bristol Race Equality Covid-19 Steering Group</u></p> <p><u>Designing a new social reality - Research on the impact of covid-19 on Bristol's VCSE sector and what the future should be – Black South West Network 2020</u></p> <p><u>Delivering an inclusive economy post COVID-19</u></p>	<p>Report focusing on how co-production using a One City approach has been used to respond to the disproportionate impact of the Covid-19 pandemic on our marginalized ethnic communities.</p> <p>Local research has highlighted how long-term underinvestment and lack of equity in funding and procurement has eroded the local Voluntary and community sector.</p> <p>Our local partners have conducted research into the ongoing impact of COVID-19 for women and have provided recommendations on what service providers can do to reduce impact further impact.</p>
<p><u>HR Analytics: Power BI reports (sharepoint.com)</u> [internal link only]</p> <p><u>Pay Gap Report</u> [internal link only]</p>	<p>The Workforce Diversity Report shows Bristol City Council Workforce Diversity statistics for Headcount, Sickness, Starters and Leavers data. The report is updated once a month with data as at the end of the previous month. It excludes data for Locally Managed Schools/Nurseries, Councillors, Casual, Seasonal and External Agency employees. The report is based on the sensitive information that staff add to Employee Self Service on iTrent (ESS).</p> <p>Age 11.9% of staff aged 16–29 compared with 39% of the Bristol Working Age population.</p> <p>41.2% of staff are over 50.</p> <p>Disability - We have an under-representation of disabled staff: 8.5% compared to the Bristol Working Age population at 12%.</p> <p>Ethnicity - Some particular minoritised ethnic groups are underrepresented within the Council workforce compared to Bristol working age population: • Asian or Asian British 2.9% versus 5.8% • Black or Black British 5.1% versus 5.3%. There is a higher representation of Black, Asian and Minority Ethnic staff in lower pay-brackets within the council as set out in our Race Pay Gap report.</p> <p>Sex – Women are over-represented as staff: 61.3% versus the Bristol Working Age population of 49%. The council's gender pay gap analysis indicates that mean pay for men is 3.02% higher than that of women and the median pay for men is 7.78% higher than that of women. The difference between the median and the mean figures is due to the high proportion of women in the top quartile of employees. There is a negative gender pay gap for women in senior roles within the pay structure, which means that women are more likely to be paid more than men.</p> <p>Religion/Belief – 43.4% of our workforce say they have religion/belief compared with 51% in the Bristol Working Age population.</p>

	<p>Sexual Orientation- 6.4% of our workforce have told us they are lesbian, gay or bisexual, which compares with 9.1% for the Bristol Working Age population.</p> <p>Marital Status – 18.1% of our workforce are Married, in a Declared Partnership or Civil Partnership. However, we do not have this data for 58.4% of staff and there is currently no comparative data for the Bristol Working Age population.</p> <p>Pregnancy/Maternity – 2.3% of our colleagues are currently pregnant or on maternity leave.</p> <p>Trans – 0.2% of our colleagues have recorded they are trans, however very few employees have made a declaration on this and there is no comparative data for the Bristol Working Age population.</p> <p>Socio-Economic (deprivation) – 8.1% of the Council’s workforce live within Bristol’s most deprived areas.</p>
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2.2 Do you currently monitor relevant activity by the following protected characteristics?

<input checked="" type="checkbox"/> Age	<input checked="" type="checkbox"/> Disability	<input checked="" type="checkbox"/> Gender Reassignment
<input checked="" type="checkbox"/> Marriage and Civil Partnership	<input checked="" type="checkbox"/> Pregnancy/Maternity	<input checked="" type="checkbox"/> Race
<input checked="" type="checkbox"/> Religion or Belief	<input checked="" type="checkbox"/> Sex	<input checked="" type="checkbox"/> Sexual Orientation

2.3 Are there any gaps in the evidence base?

Where there are gaps in the evidence, or you don’t have enough information about some equality groups, include an equality action to find out in section 4.2 below. This doesn’t mean that you can’t complete the assessment without the information, but you need to follow up the action and if necessary, review the assessment later. If you are unable to fill in the gaps, then state this clearly with a justification.

For workforce related proposals all relevant characteristics may not be included in HR diversity reporting (e.g. pregnancy/maternity). For smaller teams diversity data may be redacted. A high proportion of not known/not disclosed may require an action to address under-reporting.

Although our corporate approach is to collect diversity monitoring for all relevant characteristics, there are gaps in the available local diversity data for some characteristics, especially where this has not always historically been included in census and statutory reporting e.g. for sexual orientation. We also know there are some under-reporting gaps in our workforce diversity information - where personal and confidential information is voluntarily requested from staff.

2.4 How have you involved communities and groups that could be affected?

You will nearly always need to involve and consult with internal and external stakeholders during your assessment. The extent of the engagement will depend on the nature of the proposal or change. This should usually include individuals and groups representing different relevant protected characteristics. Please include details of any completed engagement and consultation and how representative this had been of Bristol’s diverse communities.

Include the main findings of any engagement and consultation in Section 2.1 above.

If you are managing a workforce change process or restructure please refer to [Managing change or restructure \(sharepoint.com\)](#) for advice on consulting with employees etc. Relevant stakeholders for engagement about workforce changes may include e.g. staff-led groups and trades unions as well as affected staff.

We launched a public consultation on our budget proposals between 09th November 2023 to the 21st December 2023. This consultation set out all the savings proposals we had identified to produce a balanced budget in the context of reduced available funding and increasing financial pressures.

The Annual Leave Top-Up (ALTU) Scheme has been running for more than a decade. In some years, one application window has been used (in the Spring); in other years, two application windows have been used (Spring and Autumn). Trade unions and the forerunners of the current staff-led groups were consulted on the proposals at the outset, and again periodically since where particular queries or concerns have been raised. Going forward we will work more closely with our Disabled Colleagues Network to ensure all communications relating to this scheme are accessible.

This proposal adds an additional application window to a pre-existing scheme; it does not alter the parameters of the scheme in any way. Since the scheme has been in place, feedback has included the potential inconstant application of scheme by managers, there hasn't been concerns raised with HR in relation to colleagues being expected to cover the work of others who are taking leave purchased through the ALTU scheme.

2.5 How will engagement with stakeholders continue?

Explain how you will continue to engage with stakeholders throughout the course of planning and delivery. Please describe where more engagement and consultation is required and set out how you intend to undertake it. Include any targeted work to seek the views of under-represented groups. If you do not intend to undertake it, please set out your justification. You can ask the Equality and Inclusion Team for help in targeting particular groups.

All responses to the Budget Consultation will be analysed and included in the Council's Budget report that will be published on the Bristol City Council website in early 2023. We will take Budget consultation responses into account when developing this and other final proposals to put to the Cabinet and a meeting of the Full Council for approval. The final decision will be taken by Full Council at its budget setting meeting in February / March 2024.

We will continue our dialogue with trade unions and staff led groups so that we continue to assess and mitigate any impact on those from protected groups.

Step 3: Who might the proposal impact?

Analysis of impacts must be rigorous. Please demonstrate your analysis of any impacts of the proposal in this section, referring to evidence you have gathered above, and the characteristics protected by the Equality Act 2010. Also include details of existing issues for particular groups that you are aware of and are seeking to address or mitigate through this proposal. See detailed guidance documents for advice on identifying potential impacts etc. [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#)

3.1 Does the proposal have any potentially adverse impacts on people based on their protected or other relevant characteristics?

Consider sub-categories (different kinds of disability, ethnic background etc.) and how people with combined characteristics (e.g. young women) might have particular needs or experience particular kinds of disadvantage.

Where mitigations indicate a follow-on action, include this in the 'Action Plan' Section 4.2 below.

GENERAL COMMENTS (highlight any potential issues that might impact all or many groups)

Even when we plan to consult in more detail on specific service delivery proposals at a later time, we must ensure that any budget setting decisions that are likely to affect future services are informed by sufficient consultation and proper analysis. This is so that decision makers can have due regard to any likely disproportionate or negative impact on the basis of their protected and other relevant characteristics at the time the budget is approved – not afterwards¹.

Decision makers will have the ability to make changes to the individual spending plans following further consultation as appropriate and detailed evaluation of the impact of specific proposals. Within the proposed budget envelope there will be financial mitigation put aside for any non-delivery or amendments to proposals which may occur due to future consideration of equalities issues or other factors.

As well as identifying whether budget changes will have a disproportionate impact on particular groups (e.g., because they are over-represented in a particular cohort), we need to pay particular attention to the risk of indirect discrimination: when an apparently neutral decision puts members of a given group at a particular disadvantage compared with other people because of their different needs and circumstances.

We are also aware of existing structural inequalities and particular considerations, issues, and disparities for people in Bristol based on their characteristics, which we will take into account.

PROTECTED CHARACTERISTICS

Age: Young People	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none">• Younger staff are significantly under-represented within our workforce and the council has a much older age profile compared to Bristol Working Age population. In 2023/24, 7.3% of staff who purchased additional leave were aged 16-29, compared with representation in the BCC workforce at 11.7%.• Young people are often under-represented in engagement and consultation in Bristol and are less satisfied than average with the way the council runs things.• Children and young people in Bristol are considerably more ethnically diverse than the overall population of Bristol.• Children and young people from the most deprived areas of Bristol have the poorest outcomes in health and education in terms of health, education and future employment etc.• Young people in Bristol are more likely to:<ul style="list-style-type: none">○ have poor emotional health and wellbeing○ find inaccessible public transport prevents them from leaving their home when they want to○ 6.8% of 16-17 year olds (2020/21) were “not in education, employment or training” (NEET), worse than the national average (5.5%)• Young adults are most likely to have lost work or seen their income drop because of COVID-19 and the cost of living crisis
Mitigations:	Opportunities to promote this benefit to staff under the age of 40 should be explored.
Age: Older People	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none">• Older people are significantly over-represented in the Council’s workforce: 41.2% of BCC staff are aged 50-64 versus 20.7% in the Bristol Working Age population. In 2023/24, 46.2% of employees who purchased additional leave were aged 50-64.

	<ul style="list-style-type: none"> • Older people in Bristol are: <ul style="list-style-type: none"> ○ less likely to be comfortable using digital services ○ more reliant on public and community transport ○ more likely to be an unpaid carer ○ more likely to help out or volunteer in their community ○ less likely to have formal qualifications • Bristol Ageing Better estimated at least 11,000 older people are experiencing isolation in the city. • We must factor aging and the needs of older people into long term budgeting and service design
Mitigations:	Opportunities to promote this benefit to staff under the age of 40 should be explored.
Disability	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • At 8.6%, Disabled BCC employees are under-represented in the workforce as compared with 12.4% in the Bristol Working Age population. However, in 2023/24 11.4% of Disabled staff purchased additional leave. • 17% of Bristol’s population are disabled. There are more disabled women than men living in Bristol. • In 2021, the disability pay gap was 13.8% with disabled employees earning a median of £12.10 per hour and non-disabled employees a median of £14.03 per hour. • Disabled people are less likely to be employed in a managerial or professional occupation • the national disability employment rate was 52.7% in Q2 2021, compared to 81.0% for non-disabled people. • Disabled workers move out of work at nearly twice the rate (8.8%) of non-disabled workers (4.9%). Workless disabled people move into work at nearly one-third of the rate (11.0%) of workless non-disabled people (26.9%) • Disability increases with age: 4.1% of all children, for the working age population it increases to 12.3% and for people aged 65 and over it increases to 55.9%. • Disabled people on average have lower qualification levels than the population as a whole. • A higher proportion of disabled people rent from a social provider (local authority or housing association) • Disabled people have lower car ownership levels • Disabled people experience higher rates of hate crime and domestic abuse compared to the general population • Disabled people should be empowered to make independent living choices and have a say in access to service provision. • Budget setting needs to provide sufficient resource and flexibility to meet our legal duty to make anticipatory and responsive reasonable adjustments for disabled people including: <ul style="list-style-type: none"> ○ changing the way things are done e.g. opening / working times; ○ changes to overcome barriers created by the physical features of premises. ○ providing auxiliary aids e.g. extra equipment or a different or additional service. ○ is ‘anticipatory’ so we must think in advance and ongoing about what disabled people might reasonably need.

	<ul style="list-style-type: none"> Disabled people must not be charged for their reasonable adjustments, accessible formats or other adaptations. It is a legal requirement under the Equalities Act to ensure information is accessible to disabled employees and service users.
Mitigations:	We will work more closely with our Disabled Colleagues Network to ensure all communications relating to this scheme are accessible.
Sex	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> At 61.3%, women are over-represented amongst the BCC workforce when compared with the Bristol Working Age population of 49.1% However, in 2023/24 66.4% of staff who purchased additional leave were women. Data shows that women are more likely to be primary carers, whether for children or older relatives. This could be why they are opting to buy additional annual leave and therefore being paid less. The average UK pay gap is 15.4% in favour of men. The South West average is 16.6% with women paid 83p for every £1 earned by male counterparts. Women still bear the majority of caring responsibilities for both children and older relatives. Women are more likely to be excluded from conversations which affect decision making due to lack of representation in boards / organisational leadership. Services and workplace requirements may not take into consideration the impact of women's reproductive life course including menstruation, avoiding pregnancy, pregnancy, childbirth, breastfeeding, and menopause. Young women between the ages of 16 and 24 have higher risk of common mental health problems and higher rates of self-harm and post-traumatic stress disorder etc. Bristol female preventable mortality rates are significantly higher than the England rates Nationally 27% of women experience domestic abuse in their lifetimes. The rate of recorded domestic abuse incidents in Bristol has shown a significant rise over the last two years and 74% of victims were female. Men and boy's health is in general poorer than that of women and girl's Male life expectancy at birth in Bristol is around four years less than for females. On average men in Bristol live 18 years in poor health, women live 22 years in poor health A higher proportion of boys have physical impairments and more boys than girls have diagnosed mental health disorders and learning difficulties. Men in Bristol are more likely than women to have unhealthy lifestyle behaviours including being overweight and obese, smoking, alcohol and substance misuse There are differences between men and women in health practices and the way they use health services

	<ul style="list-style-type: none"> Men are three times more likely than women to take their own lives.
Mitigations:	Ensuring staff are aware of our policies surrounding flexi-time / leave for caring responsibilities and do not feel obliged to purchase additional annual leave to manage caring responsibilities.
Sexual orientation	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> At 6.4%, lesbian gay and bisexual (LGB) staff are under-represented in the Council's workforce – the figure for the Bristol Working Age population being 9.1%. However, in 2023/24 7.2% of colleagues who purchased additional leave were LGB. Lesbian, gay and bisexual people are statistically more vulnerable to verbal and physical abuse 1 in 5 Lesbian, Gay, Bisexual and Trans (LGBT) staff have been the target of negative comments or conduct from work colleagues in the last year because they're LGBT. More than a third of LGBT staff have hidden or disguised that they're LGBT at work in the last year because they were afraid of discrimination. 1 in 10 Black, Asian and Minority Ethnic LGBT staff have similarly been physically attacked because of their sexual orientation and /or gender identity, compared to 3% of White LGBT staff One in four lesbian and bisexual women have experienced domestic abuse in a relationship, one third of them were abused by a man. Almost half of all gay and bisexual men have experienced at least one incident of domestic abuse from either a family member or a partner since the age of 16. Research shows LGBT people face widespread discrimination in healthcare settings and one in seven LGBT people avoid seeking healthcare for fear of discrimination from staff The Stonewall LGBT in Britain - Health Report shows LGBT people are at greater risk of marginalisation during health crises, and those with multiple marginalised identities can struggle even more. In communications we should signpost and refer where possible to mutual aid and community support networks². Research has shown that LGBT people are more likely to be living with long-term health conditions, are more likely to smoke, and have higher rates of drug and alcohol use. Half of LGBT people experienced depression in the last year 14% of LGBT people have avoided treatment for fear of discrimination because they are LGBT.
Mitigations:	None identified at this stage as there is a positive evidence of LGB colleagues accessing the scheme.
Pregnancy / Maternity	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> The Equality Act 2010 applies to those who are pregnant or have given birth in the past 26 weeks, as well as making provisions to protect the rights of breastfeeding mothers. Around 80% of women will give birth and many women will also experience termination, miscarriage and stillbirth In the workplace we need to ensure equal access to recruitment, personal development, promotion and retention for employees who are pregnant or on maternity leave (including briefing and updates for any workforce changes)

	<ul style="list-style-type: none"> • Ensure there is equality of opportunity for services in relation to pregnancy and maternity. This includes e.g. providing physical access when using prams and pushchairs, and availability of toilets and baby-changing facilities etc. , and flexible working patterns and service times for childcare arrangements • Women from minoritised ethnic backgrounds are more likely to experience complications at birth • Without comparative data it's not possible to assess impact in relation to this characteristic
Mitigations:	Ensuring staff are aware of our policies surrounding flexi-time / leave for caring responsibilities.
Gender reassignment	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • As sexual orientation above trans people are statistically more vulnerable to verbal and physical abuse. Trans people regularly face prejudice and discrimination because of the way in which they transgress many of the norms of our culture and society. • 1 in 8 trans people (12%) in the workplace have been physically attacked by customers or colleagues in the last year because they were trans • Without comparative data it's not possible to assess impact in relation to this characteristic
Mitigations:	Ensuring staff are aware of our policies surrounding Annual Leave Top Up scheme
Race	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • At 2.9%, Asian or Asian British colleagues are under-represented in the BCC workforce as compared with Bristol Working Age representation of 5.8%. In 2023/24, 2.1% of those who purchased additional leave were Asian or Asian British. • At 5.1%, Black or Black British colleagues are slightly under-represented in the BCC workforce as compared with Bristol Working Age representation of 5.3%. In 2023/24, 2.9% of those who purchased additional leave were Black or Black British. • At 3.5%, Mixed race colleagues are over-represented in the Council's workforce as compared with Bristol Working Age representation of 2.9%. In 2023/24, 2.7% of those who purchased additional leave were of Mixed race. • At 1.7%, colleagues from Other Ethnic Groups are over-represented in the Council's workforce when compared with Bristol Working Age representation of 1%. In 2023/24, 0.4% of those who purchased additional leave were from Other Ethnic Groups. • Ethnic minorities in Bristol experience greater disadvantage than in England and Wales as a whole in education and employment and this is particularly so for Black African people². • In the last census (2011) 16% of the population belonged to a Black, Asian or minority ethnic group and this is likely to be higher now. • The top three countries of birth outside UK for Bristol residents are Poland, Somalia and India. • Although the race or ethnicity pay gap has narrowed in recent years there are still wide pay differences between particular ethnic groups and most minority ethnic groups earn less on average than White British people. • Bangladeshi, Pakistani, and Black ethnic groups are more likely to live in deprived neighbourhoods; and the same groups and Chinese ethnicities are

	<p>about twice as likely to live on a low income and experience child poverty compared to White groups</p> <ul style="list-style-type: none"> • Black, Asian and minoritised ethnic households are less likely to own their home and more likely to living in overcrowded housing and intergenerational households. Bangladeshi and Pakistani groups are more likely to live in multi-family households. • Black people in the UK are less likely to hold a driving licence and more likely to rely on public transport. • Black, Asian and minority ethnic groups in Bristol are more likely to find inaccessible public transport prevents them from leaving their home when they want to • Black African young people are disadvantaged in education compared to their White peers⁸. A disproportionately high percentage of Bristol school pupils from Black, Asian and minority ethnic backgrounds are excluded from school and In Bristol pupils with the lowest 'Attainment 8' scores are from Black ethnic background (highest from Chinese ethnic background.) • Organisations may lack cultural competence because minoritised ethnic staff are under- represented. • People from Black African, Other, and Black Caribbean groups have persistently high levels of unemployment and almost all ethnic minority groups in Bristol experience employment inequality when compared to White British people. • Black Asian and other minoritised ethnic groups are more likely to be self-employed than the Bristol average and over-represented in low income self-employment including taxis, takeaway restaurants • People from minoritised ethnic backgrounds are underrepresented in political and civic leadership. • People who do not speak English as a main language may require information in plain English and community language translations or videos etc.
Mitigations:	<p>Greater promotion of this benefit to black and racially minoritised staff. Opportunities to remove potential bias from the decision-making process should be explored.</p>
Religion or Belief	<p>Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p>
Potential impacts:	<ul style="list-style-type: none"> • At 25.4%, Christian colleagues are under-represented in the BCC workforce as compared with Bristol Working Age representation of 43.5%. In 2023/24, 27.7% of those who purchased additional leave were Christian. • At 32.1%, colleagues with no religion/belief are under-represented in the BCC workforce as compared with Bristol Working Age representation of 41.5%. In 2023/24, 42.8% of those who purchased additional leave had no religion/belief. • At 18%, colleagues with a religion/belief other than Christianity are over-represented in the Council's workforce as compared with Bristol Working Age representation of 7.4%. In 2023/24, 6.3% of those who purchased additional leave had a religion/belief other than Christianity. • There are at least 45 religions represented in Bristol. Approximately 1 in 20 people in Bristol are Muslim, and Islam is the second religion in Bristol after Christianity • Budget proposals should take into account differing needs because of people's religion and belief (for example different requirements around diet, life events, and holidays)

	<ul style="list-style-type: none"> Having a designated multi-faith room can make environments such as workplaces and shopping centres is more accessible and friendly for people from faith groups where regular prayer is required.
Mitigations:	Greater promotion of this benefit to colleagues with a religion/belief other than Christianity.
Marriage & civil partnership	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> 0.4% of BCC staff are in a civil partnership. 0.5% of those who purchased additional leave in 2023/24 were in a civil partnership. 0.3% of BCC staff are in a declared partnership. 0.1% of those who purchased additional leave in 2023/24 were in a declared partnership. 1.6% of BCC staff are divorced. 1.7% of those who purchased additional leave in 2023/24 were divorced. 18.1% of BCC staff are married. 19.8% of those who purchased additional leave in 2023/24 were married. 7.6% of BCC staff have a partner. 8.2% of those who purchased additional leave in 2023/24 had a partner. 13.5% of BCC staff are single. 10.6% of those who purchased additional leave in 2023/24 were single. 0.2% of BCC staff are widowed. 0.9% of those who purchased additional leave in 2023/24 were widowed.
Mitigations:	Greater promotion of this benefit to staff
OTHER RELEVANT CHARACTERISTICS	
Socio-Economic (deprivation)	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> 8.1% of BCC staff live in the most deprived wards of Bristol. 6.3% of those who purchased additional leave in 2023/24 lived in the most deprived wards of Bristol. 10.4% of BCC staff live in the least deprived wards of Bristol. 4.5% of those who purchased additional leave in 2023/24 lived in the least deprived wards of Bristol. Bristol has 41 areas in the most deprived 10% in England, including 3 in the most deprived 1%. The greatest levels of deprivation are in Hartcliffe & Withywood, Filwood and Lawrence Hill. In Bristol 15% of residents - 70,800 people - live in the 10% most deprived areas in England, including 19,000 children and 7,800 older people. There are an estimated 29,045 households living in fuel poverty in Bristol, 14.4% of all households (BEIS, 2022) 4.6% of households have experienced moderate to severe food insecurity, rising to 11.2% in the most deprived areas of the city (QoL 2021-22) 34.6% of people in Bristol are dissatisfied with the way the Council runs things, but this is 47.5% for people living in the most deprived areas of the city (QoL 2021-22). The inequalities gap in life expectancy between the most and least deprived areas in Bristol is 9.9 years for men and 6.7 years for women.
Mitigations:	Greater promotion of this benefit to colleagues who live in the most deprived wards of Bristol.
Carers	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> Being a carer can be a huge barrier to accessing services and maintaining employment

	<ul style="list-style-type: none"> • We need to consider the timing/availability of services, events etc. to allow flexibility for carers. • As with Disability and Pregnancy and Maternity – policies which aim to restrict driving or parking can have a disproportionate impact on people who are reliant on having their own transport. • Studies show around 65% of adults have provided unpaid care for a loved one. • Women have a 50% likelihood of being an unpaid carer by the age of 46 (by age 57 for men) • Young carers are often hidden and may not recognise themselves as carers • Without comparative data it's not possible to assess impact in relation to this characteristic
Mitigations:	Ensuring staff are aware of our policies surrounding flexi-time / leave for caring responsibilities.

3.2 Does the proposal create any benefits for people based on their protected or other relevant characteristics?

Outline any potential benefits of the proposal and how they can be maximised. Identify how the proposal will support our [Public Sector Equality Duty](#) to:

- ✓ Eliminate unlawful discrimination for a protected group
- ✓ Advance equality of opportunity between people who share a protected characteristic and those who don't
- ✓ Foster good relations between people who share a protected characteristic and those who don't

The scale of the potential gap in our core funding means that there is very limited opportunity to bring genuine additional benefit to equalities groups in the circumstances. However we have considered as far as possible the need to: eliminate discrimination, harassment, victimisation and any other conduct prohibited under the Equality Act 2010; advance equality of opportunity between people from different groups; and foster good relations between people from different groups.

Our budget savings proposals are aligned to our Corporate Strategy and although we have limited resources our future focus will be on achieving those priorities we have identified including tackling poverty and intergenerational inequality.

For this proposal, there is the potential for a positive impact on staff wellbeing by enabling colleagues to purchased additional annual leave as their circumstances may have changed since the application window in the Spring.

Step 4: Impact

4.1 How has the equality impact assessment informed or changed the proposal?

What are the main conclusions of this assessment? Use this section to provide an overview of your findings. This summary can be included in decision pathway reports etc.

If you have identified any significant negative impacts which cannot be mitigated, provide a justification showing how the proposal is proportionate, necessary, and appropriate despite this.

Summary of significant negative impacts and how they can be mitigated or justified:

The impact assessment has identified areas of impacts for individuals with protected characteristics. Mitigation includes ensuring the scheme is promoted widely to all staff and that a consistent approach is

taken by managers in assessing and approving applications. Decisions will need to take account of business needs and the impact on the rest of the team.

In light of the take-up data and potential for bias by managers we will work with staff led groups and trade unions to give active consideration to additional measures to mitigate this.

Summary of positive impacts / opportunities to promote the Public Sector Equality Duty:

There is the potential for a positive impact on staff wellbeing with a more flexible approach to annual leave.

4.2 Action Plan

Use this section to set out any actions you have identified to improve data, mitigate issues, or maximise opportunities etc. If an action is to meet the needs of a particular protected group please specify this.

Improvement / action required	Responsible Officer	Timescale
All relevant EqIAs will be published on the Council’s website https://www.bristol.gov.uk/council-spending-performance/council-budgets and continue to be updated as appropriate.	Head of HR	Ongoing
Explore opportunities to promote the benefits of the scheme to employees who in 2023/24 were under-represented in take-up	Head of HR	By Spring 2024
Explore opportunities to remove potential bias from the decision-making process	Head of HR	By Spring 2024

4.3 How will the impact of your proposal and actions be measured?

How will you know if you have been successful? Once the activity has been implemented this equality impact assessment should be periodically reviewed to make sure your changes have been effective your approach is still appropriate.

Our Equality and Inclusion Annual Progress Reports show what we have done to achieve the aims of our Equality and Inclusion policy and strategy, and the progress we have made including reporting on all relevant KPIs and workforce diversity [Equalities policy - bristol.gov.uk](https://www.bristol.gov.uk/equalities-policy)

Consultation responses

Analysis of 2024/25 scheme take-up by protected characteristic

The Equality and Inclusion Team need at least five working days to comment and feedback on your EqIA. EqIAs should only be marked as reviewed when they provide sufficient information for decision-makers on the equalities impact of the proposal. Please seek feedback and review from the [Equality and Inclusion Team](#) before requesting sign off from your Director¹.

Equality and Inclusion Team Review:
Reviewed by Equality and Inclusion Team

Director Sign-Off:

¹ Review by the Equality and Inclusion Team confirms there is sufficient analysis for decision makers to consider the likely equality impacts at this stage. This is not an endorsement or approval of the proposal.



Steph Griffin, Director of Workforce & Change

Date: 27/11/2023

27/11/2023

Equality Impact Assessment [version 2.10]



Title: GAPCE1 Recruitment and Retention of Foster Carers	
<input checked="" type="checkbox"/> Budget Proposal	<input type="checkbox"/> New <input checked="" type="checkbox"/> Already exists / review <input type="checkbox"/> Changing
Directorate: Children and Education	Lead Officer name: James Beardall
Service Area: Children's 0-25 Through Care	Lead Officer role: Head of Service - Children's 0-25 Through Care

Step 1: What do we want to do?

The purpose of an Equality Impact Assessment is to assist decision makers in understanding the impact of proposals as part of their duties under the Equality Act 2010. Detailed guidance to support completion can be found here [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#).

This assessment should be started at the beginning of the process by someone with a good knowledge of the proposal and service area, and sufficient influence over the proposal. It is good practice to take a team approach to completing the equality impact assessment. Please contact the [Equality and Inclusion Team](#) early for advice and feedback.

1.1 What are the aims and objectives/purpose of this proposal?

Briefly explain the purpose of the proposal and why it is needed. Describe who it is aimed at and the intended aims / outcomes. Where known also summarise the key actions you plan to undertake. Please use plain English, avoiding jargon and acronyms. Equality Impact Assessments are viewed by a wide range of people including decision-makers and the wider public.

Budget context

Every year, the council must agree an annual budget which balances the money we spend with the money we are expecting to receive. Councils across the country are continuing to face financial challenges and based on our current forecasts, we face a funding gap over the next five years (to 2028/29) of up to £81.2 million dependent on the severity of factors such as inflation, funding changes, and unavoidable service pressures. This is in addition to the £17.7 million of savings and efficiencies proposals for 2024-2028 outlined in the 2023/24 budget and assumed delivery of 2023/24 savings in the current year.

The Council has defined statutory responsibilities, but deliver against a far broader agenda, providing universal services benefiting the whole community, and targeted services aimed at individuals, communities with particular needs, and businesses – administered by our workforce, city partners, stakeholder organisations and commissioned services.

To address these challenges, we are looking across all of our services with a focus on:

- maximising our transformation programmes – where we are looking to improve services whilst achieving the best value for money
- income opportunities – where we are looking to improve our external income and most effectively apply that income

- targeted reviews – where we are looking at services that are comparatively high in cost compared to other councils to see where we can do things differently to reduce costs, be more efficient in how we do things and, in some cases, stop doing some things entirely.

This Proposal

This proposal will support the Fostering Service to recruit and retain foster carers, with innovative approaches to encourage and support foster carers with the right skills and experience, to come forward and offer some of our most vulnerable children an opportunity to experience a stable family life.

There are currently 727 children in care, 57% are male and 43% female (compared to 51% and 49% of the overall child population). 9% have a disability (compared to 6.1% of the total Bristol child population) and the majority (73%) are aged 10-17. In relation to ethnicity, 60% of children and young people in care are white (compared to 72% across the total Bristol child population), 16% are mixed race, 12% Other Ethnicity, 9% Black British, 3% Asian/Asian British. We know there are gaps in local diversity data, especially where this is has not historically been included in statutory reporting. The scope of the proposal includes the Fostering Team, the current community of Bristol Foster Carers, Bristol citizens who are potential Foster Carers and Children the in the care of Bristol City Council who need to live in local Foster Care.

This proposal would significantly increase our cohort of local foster carers and reduce the use of more expensive placements, including those out of area, expensive distant placements and the use of Independent Fostering Agencies. We currently have 414 children and young people in external placements of which 181 are in Bristol and 233 are outside of Bristol. By growing our local foster care community, we would increase the opportunities for children to live locally and be able to attend the same school and stay in touch with their friends and family networks. There is no set target figure but increasing the number of foster carers will reduce the number of external placements. Increasing our pool of foster carers would enable children coming into care and children currently in care to be better matched with carers who are best placed to support their needs which may be needs arising from their Disability status, race, religion and culture.

Increasing net foster carers will be promoted via a digital campaign, the Southwest Fostering Recruitment Hub and implementing an extended family model that provides sleepovers and short breaks, peer support, regular joint planning and training, and social activities known as Mockingbird. The outcomes of these initiatives will retain current carers through improved support, the reduction of breakdowns of placements, reduce carer terminations and therefore increase the number of foster carers.

This proposal should have a positive equality impact for children and young people across the city including some minoritized ethnic groups who are over-represented in the children in care population. No negative impacts have been identified at this stage. The proposal should improve equality of opportunity by offering the enhanced financial offer to make those who may be disadvantaged by financial constraints to make the necessary changes to meet the needs of these children and young people. Furthermore, it would have a positive equality impact for children and young people in care across the city by having a more diverse cohort of foster carers.

1.2 Who will the proposal have the potential to affect?

<input type="checkbox"/> Bristol City Council workforce	<input checked="" type="checkbox"/> Service users	<input checked="" type="checkbox"/> The wider community
<input checked="" type="checkbox"/> Commissioned services	<input checked="" type="checkbox"/> City partners / Stakeholder organisations	
Additional comments:		

1.3 Will the proposal have an equality impact?

<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	[please select]
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Could the proposal affect access levels of representation or participation in a service, or does it have the potential to change e.g. quality of life: health, education, or standard of living etc.?

If 'No' explain why you are sure there will be no equality impact, then skip steps 2-4 and request review by Equality and Inclusion Team

If 'Yes' complete the rest of this assessment, or if you plan to complete the assessment at a later stage please state this clearly here and request review by the Equality and Inclusion Team.

An enhanced offer and support for Bristol Foster carers would mean that more people would be able to become carers or remain as a carer for the Council and it should also help us improve equality of opportunity and diversify of our foster carers. Increasing net foster carers (stretch beyond current saving) through digital campaigning, Southwest Fostering Recruitment Hub and implementing an extended family model that provides sleepovers and short breaks, peer support, regular joint planning and training, and social activities known as Mockingbird. The outcomes of these initiatives will retain current carers through improved support, reduce breakdowns of placements, reduce carer terminations and therefore increasing the tenure of our carers and act as a positive for recruitment of carers, including under-represented groups in the cohort of foster carers.

By growing our local foster carer community, we would increase the opportunities for children and young people to live locally and be able to attend the same school and stay in touch with their friends and family networks. In summary the proposal will positively impact via; greater local sufficiency for children in care in fostering services, greater stability for children in residential care and the ability to ensure these homes remain safely at full capacity, ensuring resources are best utilised, reduce the dependence on expensive independent foster agencies and de-escalate the use of residential, and high-cost placements for children in care.

This proposal aligns to the Corporate Strategy: Theme 1: of the Corporate Strategy 2022-27 is Children and Young People with the top-level aim of achieving "a city where every child belongs and every child gets the best start in life, whatever circumstances they were born in to". Child friendly city - Children and young people are supported by the city, their community, and the council to have the best possible start in life. They can reach their full potential and are kept safe from and supported to overcome violence, abuse, and other adverse childhood experiences, whatever the circumstances of their birth. Supported to thrive - Children and young people are supported by the city, their community, and the council to have the best possible start in life. They can reach their full potential and are kept safe from and supported to overcome violence, abuse, and other adverse childhood experiences, whatever the circumstances of their birth. Intergenerational equality - Lead city-wide approaches to tackling the root causes of structural inequality, breaking cycles of disadvantage, poverty, and trauma across generations to improve health and life opportunities. Furthermore, aligns to Bristol's Belonging Strategy. The over-arching vision of the strategy is supported by four pillars which will deliver on the intentions of the Bristol One City Plan, the Bristol Corporate Parenting Strategy, the Bristol Children's Charter and the Bristol Equality Charter. This proposal contributes to the Health and Wellbeing Strategy working with communities, children and families, schools, early years which in turn impacts on demand management.

Step 4: Impact

4.1 How has the equality impact assessment informed or changed the proposal?

What are the main conclusions of this assessment? Use this section to provide an overview of your findings. This summary can be included in decision pathway reports etc.

If you have identified any significant negative impacts which cannot be mitigated, provide a justification showing how the proposal is proportionate, necessary, and appropriate despite this.

Summary of significant negative impacts and how they can be mitigated or justified:
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none

Summary of positive impacts / opportunities to promote the Public Sector Equality Duty:
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This should have a positive equality impact for children and young people across the city including some minoritised ethnic groups who are over-represented in the children in care population. It should also help us improve equality of opportunity and diversity of our foster carers through financial incentives.

4.2 Action Plan

Use this section to set out any actions you have identified to improve data, mitigate issues, or maximise opportunities etc. If an action is to meet the needs of a particular protected group please specify this.

Improvement / action required	Responsible Officer	Timescale
All relevant EqlAs will be published on the Council's website https://www.bristol.gov.uk/council-spending-performance/council-budgets and continue to be updated as appropriate.	James Beardall	Ongoing
Ongoing monitoring of the service with inclusion of voice of young people	James Beardall	Ongoing

4.3 How will the impact of your proposal and actions be measured?

How will you know if you have been successful? Once the activity has been implemented this equality impact assessment should be periodically reviewed to make sure your changes have been effective your approach is still appropriate.

Our Equality and Inclusion Annual Progress Reports show what we have done to achieve the aims of our Equality and Inclusion policy and strategy, and the progress we have made including reporting on all relevant KPIs and workforce diversity Equalities policy - bristol.gov.uk

We will also know if we have been successful through our monthly monitoring and quarterly assurance reports, including:

- | |
|---|
| <ol style="list-style-type: none">1. Measuring the number of Foster Carers, we have recruited and retained,2. Measuring the number of children placed with these Foster Carers3. Measuring the number of children moved from external placements into a foster care home4. Measuring recruitment of Foster Carers from our minoritised ethnic groups |
|---|

The Equality and Inclusion Team need at least five working days to comment and feedback on your EqlA. EqlAs should only be marked as reviewed when they provide sufficient information for decision-makers on the equalities

impact of the proposal. Please seek feedback and review from the [Equality and Inclusion Team](#) before requesting sign off from your Director¹.

Equality and Inclusion Team Review: The Equality and Inclusion Team	Director Sign-Off:  Vanessa Wilson Director of Children & Education Transformation
Date: 19/12/2023	19/12/2023

¹ Review by the Equality and Inclusion Team confirms there is sufficient analysis for decision makers to consider the likely equality impacts at this stage. This is not an endorsement or approval of the proposal.

Equality Impact Assessment [version 2.10]



Title: GAPCE3 Children's Homes	
<input checked="" type="checkbox"/> Budget Proposal	<input type="checkbox"/> New <input checked="" type="checkbox"/> Already exists / review <input type="checkbox"/> Changing
Directorate: Children and Education	Lead Officer name: Gail Rogers
Service Area: Children and Families	Lead Officer role: Head of Service Childrens Commissioning

Step 1: What do we want to do?

The purpose of an Equality Impact Assessment is to assist decision makers in understanding the impact of proposals as part of their duties under the Equality Act 2010. Detailed guidance to support completion can be found here [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#).

This assessment should be started at the beginning of the process by someone with a good knowledge of the proposal and service area, and sufficient influence over the proposal. It is good practice to take a team approach to completing the equality impact assessment. Please contact the [Equality and Inclusion Team](#) early for advice and feedback.

1.1 What are the aims and objectives/purpose of this proposal?

Briefly explain the purpose of the proposal and why it is needed. Describe who it is aimed at and the intended aims / outcomes. Where known also summarise the key actions you plan to undertake. Please use [plain English](#), avoiding jargon and acronyms. Equality Impact Assessments are viewed by a wide range of people including decision-makers and the wider public.

Budget context

Every year, the council must agree an annual budget which balances the money we spend with the money we are expecting to receive. Councils across the country are facing financial challenges and based on our current forecasts, we face a funding gap over the next five years (to 2027/28) of up to £87.6 million dependent on the severity of factors such as rising costs of fuel, energy and inflation. This is in addition to the £34.3 million of savings and efficiencies proposals for 2022-2027 outlined in the 2022/23 budget.

The Council has defined statutory responsibilities, but deliver against a far broader agenda, providing universal services benefiting the whole community, and targeted services aimed at individuals, communities with particular needs, and businesses – administered by our workforce, city partners, stakeholder organisations and commissioned services.

To address these challenges we must look again across all of our services to find where we can do things differently to reduce costs, be more efficient in how we do things and, in some cases, stop doing some things entirely.

This Proposal

Bristol City Council published a sufficiency strategy in September 2022 which outlines plan to grow the number of places available in Bristol for children requiring residential care. In January 2023, Cabinet endorsed proposals to tender for a Strategic partner to run these homes as well as some fostering and 16+ provision. Within this paper, we included a proposal to open two solo homes which would be acquired through our strategic housing partner, Goram Homes.

The two homes will be co-designed internally with children in care and will be supported by Health and Education colleagues to ensure the children living there will have the best possible chance of continuing with existing education, help and support services. It is important to offer solo homes for children with high levels of psycho-social difficulty because past experiences has often led to attachment difficulty and a poor sense of self value and understanding of social dynamics.

We currently have 77 children in external residential provision outside of Bristol. For children with high levels of distress, it can be extremely difficult to find a registered home that will work with them, and these children can sometimes remain in hospital following admissions around their emotional and mental health.

The project is part of the wider work the Council is undertaking to deliver greater sufficiency in or close to Bristol. More children in care will be able to remain living locally, enabling them to maintain family, health and education links.

The mental health home is very specific to a small cohort of young people specifically for females with a diagnosis of autism. So, the addition of this home will meet those equality needs. The children will be allocated based on need. We will commission a strategic partner to run the homes, and Bristol City Council will have responsibility for working in partnership with the Provider to ensure that we are meeting the needs of the children and young people. The services have been co-designed with Health, Education and Social Care and we will ensure the contractual arrangements in place are flexible to meet any changing demographic of children and young people's needs.

As part of the process, providers will be required to demonstrate a good understanding of Equality Act 2010 requirements and the public sector equality duty; including that equality of opportunity is central to internal processes / workforce; and services will be regularly tailored and reviewed to meet the diverse needs of Bristol citizens.

1.2 Who will the proposal have the potential to affect?

<input type="checkbox"/> Bristol City Council workforce	<input checked="" type="checkbox"/> Service users	<input checked="" type="checkbox"/> The wider community
<input checked="" type="checkbox"/> Commissioned services	<input checked="" type="checkbox"/> City partners / Stakeholder organisations	
Additional comments:		

1.3 Will the proposal have an equality impact?

Yes **No** [please select]

Could the proposal affect access levels of representation or participation in a service, or does it have the potential to change e.g. quality of life: health, education, or standard of living etc.?

If 'No' explain why you are sure there will be no equality impact, then skip steps 2-4 and request review by Equality and Inclusion Team.

If 'Yes' complete the rest of this assessment, or if you plan to complete the assessment at a later stage please state this clearly here and request review by the Equality and Inclusion Team.

Step 2: What information do we have?

2.1 What data or evidence is there which tells us who is, or could be affected?

Please use this section to demonstrate an understanding of who could be affected by the proposal. Include general population data where appropriate, and information about people who will be affected with particular reference to protected and other relevant characteristics: [How we measure equality and diversity \(bristol.gov.uk\)](https://www.bristol.gov.uk/what-we-do/equality-diversity)

Use one row for each evidence source and say which characteristic(s) it relates to. You can include a mix of qualitative and quantitative data e.g. from national or local research, available data or previous consultations and engagement activities.

Outline whether there is any over or under representation of equality groups within relevant services - don't forget to benchmark to the local population where appropriate. Links to available data and reports are here [Data, statistics and intelligence \(sharepoint.com\)](https://www.bristol.gov.uk/what-we-do/data-statistics-intelligence). See also: [Bristol Open Data \(Quality of Life, Census etc.\)](https://www.bristol.gov.uk/what-we-do/open-data); [Joint Strategic Needs Assessment \(JSNA\)](https://www.bristol.gov.uk/what-we-do/joint-strategic-needs-assessment); [Ward Statistical Profiles](https://www.bristol.gov.uk/what-we-do/ward-statistical-profiles).

For workforce / management of change proposals you will need to look at the diversity of the affected teams using available evidence such as [HR Analytics: Power BI Reports \(sharepoint.com\)](https://www.bristol.gov.uk/what-we-do/hr-analytics) which shows the diversity profile of council teams and service areas. Identify any over or under-representation compared with Bristol economically active citizens for different characteristics. Additional sources of useful workforce evidence include the [Employee Staff Survey Report](https://www.bristol.gov.uk/what-we-do/employee-staff-survey-report) and [Stress Risk Assessment Form](https://www.bristol.gov.uk/what-we-do/stress-risk-assessment-form)

Data / Evidence Source [Include a reference where known]	Summary of what this tells us
<u>Census 2021</u>	The Census details the demographic profile of Bristol.
<u>The population of Bristol</u> <u>Bristol Key Facts 2022</u>	Updated annually. The report brings together statistics on the current estimated population of Bristol, recent trends in population, future projections and looks at the key characteristics of the people living in Bristol. Population Profiles for Equalities Groups bring together detailed analysis looking at equalities groups and how they differ in relation to age, health, employment, education and housing, and maps the distribution of equalities groups across the city.
<u>Ward profile data (bristol.gov.uk)</u>	The Ward Profiles provide a range of datasets, including population, life expectancy, health and education disparities etc. for each of Bristol's electoral wards.
<u>Bristol Quality of Life Survey 2021-22</u>	The Quality of Life (QoL) survey is an annual randomised sample survey of the Bristol population, mailed to 33,000 households (with online & paper options), and some additional targeting to boost numbers from low responding groups. In brief, the most recent QoL survey indicated that inequality and deprivation continue to affect people's experience in almost every element measured by the survey.

The [Quality of Life 2021/22 data dashboard](#) highlights those indicators, wards and equality and demographic groups which are better or worse than the Bristol average.

For example, there are significant disparities based on people's characteristics and circumstances in the extent to which they find it difficult to manage financially:

Quality of Life Indicator	% who find it difficult to manage financially
16 to 24 years	12.5
50 years and older	6.7
65 years and older	3.2
Female	8.6
Male	8.5
Disabled	21.6
Asian /Asian British	9.9
Black/Black British	19.8
Mixed/Multiple Ethnicity	16.3
White British	7.8
White Minority Ethnic	8.4
Lesbian Gay or Bisexual	12.7
No Religion or Faith	8.0
Christian Religion	8.3
Other Religions	18.2
Carer	10.7
Full Time Carer	14.0
Part Time Carer	9.7
Single Parent	28.6
Two Parent	9.6
Parent (all)	12.0
No Qualifications	10.0
Non-Degree Qualified	12.9
Degree Qualified	6.7
Rented (Council)	20.3
Rented (HA)	20.6
Rented (Private)	14.6
Owner Occupier	4.6
Most Deprived 10%	18.8
Bristol Average	8.7

<p><u>Joint Strategic Needs Assessment (JSNA)</u></p>	<p>The Joint Strategic Needs Assessment reports on the health and wellbeing needs of the people of Bristol. It brings together detailed information on local health and wellbeing needs and looks ahead at emerging challenges and projected future needs. The JSNA is used to provide a comprehensive picture of the health and wellbeing needs of Bristol (now and in the future); to inform decisions about how we design, commission and deliver services, and also about how the urban environment is planned and managed; to improve and protect health and wellbeing outcomes across the city while reducing health inequalities; and to provide partner organisations with information on the changing health and wellbeing needs of Bristol, at a local level, to support better service delivery.</p> <p>Based on national studies estimated number of children and young people in Bristol who are likely to be experiencing mental illness at any one time is:</p> <ul style="list-style-type: none"> • 920 children aged 2-4 (1 in 18 or 5.5%). • 9,600 children and young people aged 5-16 (1 in 6 or 16%). This has increased from 1 in 9 or 10.8% among this age group in 2019, reflecting the impact of COVID 19 and related policy on the children and young people population. • 9,900 young people aged 17-22 (1 in 5 or 20%) <p>Nationally, rates of emotional disorder among 5–19-year-olds are higher among females (10%) than males (6.2%).</p>
<p>BCC Insight, Performance and Intelligence (2021). The Population of Bristol September 2021</p>	<p>The mid-2020 population of Bristol is estimated to be 465,900 with children making up 85,700 of this total (18.4% of the total population).</p> <p>This means almost 1 in every five people living in Bristol is under the age of 16, with the age profile by ward varying significantly. There are 167,035 children and young people aged 0-25 in Bristol. Based on the figures above, this is over a third of the total Bristol population.</p>
<p>Office for National Statistics (ONS) 2018: based population projections</p>	<p>Between 2010 and 2020 the number of children living in Bristol increased by 8,900 (11.6%), higher than the England and Wales increase of 8.6%. The increase has been largely amongst primary school aged children, with the number of 5 - 11-year-olds increasing by 25% over the decade. The trends reflect the substantial increase in numbers of births in Bristol in recent years, although the number of births is now falling. The proposal will specifically support children between the ages of 10-19 which is estimated to be 62,900 currently.</p>
<p>Children in Care Data [internal link only]</p>	<p>There are currently 727 children in care, 57% are male and 43% female (compared to 51% and 49% of the overall child population). 9% have a disability (compared to 6.1% of the total Bristol child population) and the majority (73%) are aged 10-17.</p> <p>Ethnicity:</p>

	<p>60% White (compared to 72% across the total Bristol child population) 16% Mixed Race 12% Other Ethnicity 9% Black British 3% Asian/Asian British</p> <p>It is not possible to add other comparative data for the Bristol average child population due to the size and format of data sets.</p>
<p>Deprivation in Bristol 2019</p>	<p>Bristol continues to have deprivation ‘hot spots’ that are amongst some of the most deprived areas in the country yet are adjacent to some of the least deprived areas in the country. 15% of Bristol’s population live in the most deprived 10% of areas in England in 2019 (16% in 2015) including 18,900 children. More than a quarter of ‘children in need’ (37%) are from the ‘most deprived 10%’ areas of Bristol, whilst 71% are from the ‘most deprived 30%’ areas of Bristol.</p>

2.2 Do you currently monitor relevant activity by the following protected characteristics?

<input checked="" type="checkbox"/> Age	<input checked="" type="checkbox"/> Disability	<input type="checkbox"/> Gender Reassignment
<input type="checkbox"/> Marriage and Civil Partnership	<input type="checkbox"/> Pregnancy/Maternity	<input checked="" type="checkbox"/> Race
<input type="checkbox"/> Religion or Belief	<input checked="" type="checkbox"/> Sex	<input type="checkbox"/> Sexual Orientation

2.3 Are there any gaps in the evidence base?

Where there are gaps in the evidence, or you don’t have enough information about some equality groups, include an equality action to find out in section 4.2 below. This doesn’t mean that you can’t complete the assessment without the information, but you need to follow up the action and if necessary, review the assessment later. If you are unable to fill in the gaps, then state this clearly with a justification.

For workforce related proposals all relevant characteristics may not be included in HR diversity reporting (e.g. pregnancy/maternity). For smaller teams diversity data may be redacted. A high proportion of not known/not disclosed may require an action to address under-reporting.

Although our approach is to collect diversity monitoring for all relevant characteristics, there are gaps in the available local diversity data for some characteristics, especially where this has not always historically been included in census and statutory reporting e.g. for sexual orientation.

There are potentially gaps on our understanding of Disability for children with very complex needs. A recent reverse mapping exercise for children who had been held in an acute hospital setting due to no registered placement coming forwards for them showed that 6 of 8 children had a diagnosis or were pending diagnosis for autism and/or neurodiversity disorders. With this compelling evidence, the new Children’s Homes will ensure that staff are trained in evidence-based interventions for working with autism.

In addition, we do not monitor by gender re-assignment or religion and belief. We will capture religion and belief in our monitoring for the Homes and prevalence of gender re-assignment.

2.4 How have you involved communities and groups that could be affected?

You will nearly always need to involve and consult with internal and external stakeholders during your assessment. The extent of the engagement will depend on the nature of the proposal or change. This should usually include individuals and groups representing different relevant protected characteristics. Please include details of any completed engagement and consultation and how representative this had been of Bristol’s diverse communities.

Include the main findings of any engagement and consultation in Section 2.1 above.

If you are managing a workforce change process or restructure please refer to [Managing change or restructure \(sharepoint.com\)](#) for advice on consulting with employees etc. Relevant stakeholders for engagement about workforce changes may include e.g. staff-led groups and trades unions as well as affected staff.

We launched a public consultation on our budget proposals between 09th November 2023 and 21st December 2024. This consultation set out all the savings proposals we had identified to produce a balanced budget in the context of reduced available funding and increasing financial pressures. The consultation was made accessible through online, paper including an Easy Read version. Furthermore, the public were offered alternative formats such as Braille, large print, British Sign Language, or in another language.

2.5 How will engagement with stakeholders continue?

Explain how you will continue to engage with stakeholders throughout the course of planning and delivery. Please describe where more engagement and consultation is required and set out how you intend to undertake it. Include any targeted work to seek the views of under-represented groups. If you do not intend to undertake it, please set out your justification. You can ask the Equality and Inclusion Team for help in targeting particular groups.

All responses to the Budget Consultation will be analysed and included in the Council's Budget report that will be published on the Bristol City Council website in early 2024. We will take Budget consultation responses into account when developing this and other final proposals to put to the Cabinet and a meeting of the Full Council for approval. The final decision will be taken by Full Council at its budget setting meeting in February / March 2024.

Following the setting of the overall budget envelope there will be extensive engagement, consultation and co-design with affected communities on particular proposals which will inform future decision making prior to implementation. Our approach to public engagement and consultation will proactively target under-represented respondents to increase the participation of people from equality groups and their local representative organisations. This will help to ensure that our services and actions are informed by the views and needs of all our citizens.

Children in care will be engaged in how the properties should be furnished and decorated to best suit their needs via the Children in Care Council. If available, we will also engage with the Barnados engagement groups for marginalised and vulnerable young people. There is an expectation that the successful provider will engage the children and young people living in the service on an ongoing basis around service development and delivery. This will include personalisation of spaces and feeding into delivery of care. Previous consultation has been undertaken as part of Children's Homes Sufficiency strategy.

There will be an expectation that the successful provider for these homes engages children in the property throughout the life of the contract to ensure that the service is child led. This will be monitored as part of contract management.

Step 3: Who might the proposal impact?

Analysis of impacts must be rigorous. Please demonstrate your analysis of any impacts of the proposal in this section, referring to evidence you have gathered above, and the characteristics protected by the Equality Act 2010. Also include details of existing issues for particular groups that you are aware of and are seeking to address or mitigate through this proposal. See detailed guidance documents for advice on identifying potential impacts etc. [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#)

3.1 Does the proposal have any potentially adverse impacts on people based on their protected or other relevant characteristics?

Consider sub-categories (different kinds of disability, ethnic background etc.) and how people with combined characteristics (e.g. young women) might have particular needs or experience particular kinds of disadvantage.

Where mitigations indicate a follow-on action, include this in the 'Action Plan' Section 4.2 below.

GENERAL COMMENTS (highlight any potential issues that might impact all or many groups)	
<p>Even when we plan to consult in more detail on specific service delivery proposals at a later time, we must ensure that any budget setting decisions that are likely to affect future services are informed by sufficient consultation and proper analysis. This is so that decision makers can have due regard to any likely disproportionate or negative impact on the basis of their protected and other relevant characteristics at the time the budget is approved – not afterwards¹.</p> <p>Decision makers will have the ability to make changes to the individual spending plans following further consultation as appropriate and detailed evaluation of the impact of specific proposals. Within the proposed budget envelope there will be financial mitigation put aside for any non-delivery or amendments to proposals which may occur due to future consideration of equalities issues or other factors.</p> <p>As well as identifying whether budget changes will have a disproportionate impact on particular groups (e.g., because they are over-represented in a particular cohort), we need to pay particular attention to the risk of indirect discrimination: when an apparently neutral decision puts members of a given group at a particular disadvantage compared with other people because of their different needs and circumstances.</p> <p>We are also aware of existing structural inequalities and particular considerations, issues, and disparities for people in Bristol based on their characteristics, which we will take into account.</p>	
PROTECTED CHARACTERISTICS	
Age: Young People	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • Children and young people in Bristol are considerably more ethnically diverse than the overall population of Bristol. • Children and young people from the most deprived areas of Bristol have the poorest outcomes in health and education in terms of health, education and future employment etc. • Young people in Bristol are more likely to: <ul style="list-style-type: none"> ○ have poor emotional health and wellbeing ○ find inaccessible public transport prevents them from leaving their home when they want to ○ 6.8% of 16–17-year-olds (2020/21) were “not in education, employment or training” (NEET), worse than the national average (5.5%) • The entire cohort of service users is children and young people so they will be overrepresented on that basis. The homes are for children aged 0-18.
Mitigations:	<p>We anticipate that the new procurement arrangements will lead to an overall improvement to the service so demand for local placements can be met.</p> <p>We anticipate that the new homes will improve provision for a small subsection of children whose needs have been hard to meet.</p>

	As part of wider sufficiency programme, we have another 3-bed home proposed and is currently being renovated, so should be ready for more young people/children in approximately 12 months
Age: Older People	Does your analysis indicate a disproportionate impact? Yes No <input checked="" type="checkbox"/>
Potential impacts:	NA
Mitigations:	NA
Disability	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> Disability increases with age: 4.1% of all children, for the working age population it increases to 12.3% and for people aged 65 and over it increases to 55.9%. Disabled people should be empowered to make independent living choices and have a say in access to service provision. 9.1% of children in care have a disability compared to 6.1% of the child population. 6 of 8 children eligible for this service have been found to have autism or an investigation for autism underway. Disabled children in care could face barriers if proper adjustments are not made to fit their needs. Some children with neurodiversity find change confusing and are facing trauma through inconsistent care. Many of our complex children in care suffer some form of severe psycho-social health issues.
Mitigations:	<p>The purpose of these two homes is for our most complex children, many of whom will suffer some form of severe psycho-social health issues. These homes will have access to health interventions and are adapted to provide a safe environment for this need.</p> <p>These homes will have health intervention and designed with considerations around anti ligature furniture and fittings. The children may require access to the intensive outreach service for mental health urgent access by developing healthy ways to cope with stress, trauma, depression, anxiety, and other mental and physical health conditions by regulating their emotions and improving their relationships with others.</p> <p>Communications with children through the Children in Care Council and sub-groups will explore how to best meet differing needs and ensure the environment is accessible and effective for service-users.</p> <p>There is an expectation that the successful provider providing support to the children/young people in the homes will engage the children/young people living in the service on an ongoing basis around service development and delivery. This will include personalisation of spaces and feeding into delivery of care.</p>
Sex	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> There are currently 727 children in care, 57% are male and 43% female (compared to 51% and 49% of the overall child population). Bristol female preventable mortality rates are significantly higher than the England rates Men and boy's health is in general poorer than that of women and girl's A higher proportion of boys have physical impairments and more boys than girls have diagnosed mental health disorders and learning difficulties. Whereas young females are more adversely impacted by acute mental health presentation including disordered eating or self-harm and these young people are admitted to hospital more frequently than males with concerning mental health presentation

	<ul style="list-style-type: none"> Men are three times more likely than women to take their own lives.
Mitigations:	<p>The two homes will offer provision on the basis of need rather than gender.</p> <p>Ensure that we hear the voices of both boys and females when designing the homes and understand the different needs in terms of staffing and types of intervention.</p> <p>Within our wider children's homes sufficiency programme one of the homes being set up is specifically for males to take account of their over representation in the care population.</p>
Sexual orientation	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	
Mitigations:	See general comments above
Pregnancy / Maternity	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	
Mitigations:	See general comments above
Gender reassignment	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	
Mitigations:	See general comments above
Race	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> Ethnic minorities in Bristol experience greater disadvantage than in England and Wales as a whole in education and employment and this is particularly so for Black African people². The top three countries of birth outside UK for Bristol residents are Poland, Somalia and India. Bangladeshi, Pakistani, and Black ethnic groups are more likely to live in deprived neighbourhoods; and the same groups and Chinese ethnicities are about twice as likely to live on a low income and experience child poverty compared to White groups Black African young people are disadvantaged in education compared to their White peers⁸. A disproportionately high percentage of Bristol school pupils from Black, Asian and minority ethnic backgrounds are excluded from school and In Bristol pupils with the lowest 'Attainment 8' scores are from Black ethnic background (highest from Chinese ethnic background.) Organisations providing support to our children in homes may lack cultural competence because minoritised ethnic staff are under- represented. Need analysis demonstrates an over-representation of non- 'White British' population 40% of the child in care population, compared to 32% of children in Bristol.
Mitigations:	Through our tendering processes and contract management we will ensure providers of these homes are culturally competent and able to foster an environment that is sensitive to, and inclusive of ethnic diversity.
Religion or Belief	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>

Potential impacts:	Homes needing to cater to the differing religious or belief needs of children/young people.
Mitigations:	Consideration of staffing and scheduling in the Homes to adapt to meet the particular religious or belief needs of children being cared for. For example, that they could be supported to attend a place of worship, to access literature or resources related to a belief of their choice and supported to feel confident in expressing their held beliefs.
Marriage & civil partnership	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	NA
Mitigations:	
OTHER RELEVANT CHARACTERISTICS	
Socio-Economic (deprivation)	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	NA
Mitigations:	See general comments above
Carers	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	NA
Mitigations:	See general comments above
Other groups [Please add additional rows below to detail the impact for other relevant groups as appropriate e.g. Asylums and Refugees; Looked after Children / Care Leavers; Homelessness]	
Potential impacts:	
Mitigations:	

3.2 Does the proposal create any benefits for people based on their protected or other relevant characteristics?

Outline any potential benefits of the proposal and how they can be maximised. Identify how the proposal will support our [Public Sector Equality Duty](#) to:

- ✓ Eliminate unlawful discrimination for a protected group
- ✓ Advance equality of opportunity between people who share a protected characteristic and those who don't
- ✓ Foster good relations between people who share a protected characteristic and those who don't

The scale of the potential gap in our core funding means that there is very limited opportunity to bring genuine additional benefit to equalities groups in the circumstances. However, we have considered as far as possible the need to: eliminate discrimination, harassment, victimisation and any other conduct prohibited under the Equality Act 2010; advance equality of opportunity between people from different groups; and foster good relations between people from different groups.

Our budget savings proposals are aligned to our Corporate Strategy and although we have limited resources our future focus will be on achieving those priorities, we have identified including tackling poverty and intergenerational inequality.

The project is part of the wider work the Council is undertaking to deliver greater sufficiency in or close to Bristol. More children in care will be able to remain living locally, enabling them to maintain family, health and education links.

Step 4: Impact

4.1 How has the equality impact assessment informed or changed the proposal?

What are the main conclusions of this assessment? Use this section to provide an overview of your findings. This summary can be included in decision pathway reports etc.

If you have identified any significant negative impacts which cannot be mitigated, provide a justification showing how the proposal is proportionate, necessary, and appropriate despite this.

Summary of significant negative impacts and how they can be mitigated or justified:
None
Summary of positive impacts / opportunities to promote the Public Sector Equality Duty:
<ul style="list-style-type: none">Local high-quality, placement provision for children in careMore children in care will be able to remain living locally, enabling them to maintain family, health and education links.Social care to enable discharge and/or to prevent hospital admission and re-admissionSupport children with mental health needs to live in the community through a collaborative model of delivery with Health, Education and Social Care.

4.2 Action Plan

Use this section to set out any actions you have identified to improve data, mitigate issues, or maximise opportunities etc. If an action is to meet the needs of a particular protected group, please specify this.

Improvement / action required	Responsible Officer	Timescale
All relevant EqIAs will be published on the Council's website https://www.bristol.gov.uk/council-spending-performance/council-budgets and continue to be updated as appropriate.	Gail Rogers	Ongoing
Inclusion of equalities question in tender to ensure provider will be inclusive and work from an equalities perspective	Hannah Gillet	Autumn 24
Ongoing monitoring of the service with inclusion of voice of young people	Hannah Gillet	Ongoing

4.3 How will the impact of your proposal and actions be measured?


How will you know if you have been successful? Once the activity has been implemented this equality impact assessment should be periodically reviewed to make sure your changes have been effective your approach is still appropriate.

Our Equality and Inclusion Annual Progress Reports show what we have done to achieve the aims of our Equality and Inclusion policy and strategy, and the progress we have made including reporting on all relevant KPIs and workforce diversity [Equalities policy - bristol.gov.uk](https://www.bristol.gov.uk/equalities-policy)

There will be regular monitoring meetings with the successful provider of these homes. These meetings will focus on outcomes achieved and the quality of the provision.

The Equality and Inclusion Team need at least five working days to comment and feedback on your EqIA. EqIAs should only be marked as reviewed when they provide sufficient information for decision-makers on the equalities

impact of the proposal. Please seek feedback and review from the [Equality and Inclusion Team](#) before requesting sign off from your Director¹.

Equality and Inclusion Team Review: The Equality and Inclusion Team	Director Sign-Off:  Vanessa Wilson Director of Children and Education Transformation
Date: 19/12/2023	19/12/2023

¹ Review by the Equality and Inclusion Team confirms there is sufficient analysis for decision makers to consider the likely equality impacts at this stage. This is not an endorsement or approval of the proposal.

Equality Impact Assessment [version 2.10]



Title: GAP40 Register Office Fees Increase 2024, 2025	
<input checked="" type="checkbox"/> Budget Proposal	<input type="checkbox"/> New <input type="checkbox"/> Already exists / review <input type="checkbox"/> Changing
Directorate: Resources	Lead Officer name: Caroline Fox
Service Area: Legal and Democratic Services	Lead Officer role: Superintendent Registrar

Step 1: What do we want to do?

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1.1 What are the aims and objectives/purpose of this proposal?

Briefly explain the purpose of the proposal and why it is needed. Describe who it is aimed at and the intended aims / outcomes. Where known also summarise the key actions you plan to undertake. Please use plain English, avoiding jargon and acronyms. Equality Impact Assessments are viewed by a wide range of people including decision-makers and the wider public.

Budget context

Every year, the council must agree an annual budget which balances the money we spend with the money we are expecting to receive. Councils across the country are continuing to face financial challenges and based on our current forecasts, we face a funding gap over the next five years (to 2028/29) of up to £81.2 million dependent on the severity of factors such as inflation, funding changes, and unavoidable service pressures. This is in addition to the £17.7 million of savings and efficiencies proposals for 2024-2028 outlined in the 2023/24 budget and assumed delivery of 2023/24 savings in the current year.

The Council has defined statutory responsibilities, but deliver against a far broader agenda, providing universal services benefiting the whole community, and targeted services aimed at individuals, communities with particular needs, and businesses – administered by our workforce, city partners, stakeholder organisations and commissioned services.

To address these challenges, we are looking across all of our services with a focus on:

- maximising our transformation programmes – where we are looking to improve services whilst achieving the best value for money
- income opportunities – where we are looking to improve our external income and most effectively apply that income
- targeted reviews – where we are looking at services that are comparatively high in cost compared to other councils to see where we can do things differently to reduce costs, be more efficient in how we do things and, in some cases, stop doing some things entirely.

This proposal

The proposal is to increase a range of non-statutory, discretionary fees above the rate of inflation in 2024/25. This is to ensure a full cost recovery. Activities that fall within this proposal are:

- Room hire, and fees to provide registrars for the four ceremony rooms in the Register Office, the Old Council House.
- Fees for registrar attendance and administration at approved premises ceremonies.
- Fees for event room hire at the Old Council House.

Current Fees 2023/2024	Proposed Fee Increase 2024/2025	Percentage Increase (After Costing Exercise)
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Event Room Hire			
Lantern Room - Half Day	£250.00	£300.00	20.00%
Lantern Room - Full Day	£450.00	£500.00	11.11%
Grand Council Chamber Half Day	£300.00	£350.00	16.67%
Grand Council Chamber - Full Day	£500.00	£550.00	10.00%

Current Fees 2023/2024	Proposed Fee Increase 2024/2025	Percentage Increase (After Costing Exercise)
Bristol Room		
Monday and Tuesday	£172.00 £181.00	5.23%
Mayoral Room		
Monday - Friday	£277.00 £341.00	23.10%
Saturday	£328.00 £373.50	13.87%
Lantern Room		
Monday - Friday	£740.00 £906.00	22.43%
Saturday	£869.00 £996.00	14.61%
Sunday	£1,069.00 £1,146.00	7.20%
Bank Holiday	£1,063.00 £1,158.00	8.94%
Grand Council Chamber		
Monday - Friday	£903.00 £1,081.00	19.71%
Saturday	£1,048.00 £1,171.00	11.74%
Sunday	£1,281.00 £1,352.00	5.54%
Bank Holiday	£1,274.00 £1,364.00	7.06%
Approved Premises		
Monday - Saturday	£445.00 £674.00	51.46%
Sunday	£462.00 £695.00	50.43%
Bank Holiday	£553.00 £781.00	41.23%

The new fees will be put on the website. Around 300 couples who have booked for next year were quoted current prices with the provision that pricing next year would be agreed. All these couples will be

contacted directly, it will be ensured that these communications will also be made in an accessible way in line with the Bristol City Council website.

1.2 Who will the proposal have the potential to affect?

<input type="checkbox"/> Bristol City Council workforce	<input checked="" type="checkbox"/> Service users	<input type="checkbox"/> The wider community
<input type="checkbox"/> Commissioned services	<input checked="" type="checkbox"/> City partners / Stakeholder organisations	
Additional comments:		

1.3 Will the proposal have an equality impact?

<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	[please select]
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Could the proposal affect access levels of representation or participation in a service, or does it have the potential to change e.g. quality of life: health, education, or standard of living etc.?

If 'No' explain why you are sure there will be no equality impact, then skip steps 2-4 and request review by Equality and Inclusion Team.

If 'Yes' complete the rest of this assessment, or if you plan to complete the assessment at a later stage please state this clearly here and request review by the Equality and Inclusion Team.

Citizens engaging in civil ceremonies take part in either an opposite sex, or same sex ceremony. There is no difference in price between opposite sex and same sex ceremonies. 9% of Bristol's working age population is LGBTQ+ and 5% of all ceremonies were same sex in April – December 2023. Therefore, the LGBTQ+ community will not be disproportionately affected by the price increase as they are not over-represented in civil ceremonies compared to the population.

All couples have the option of statutory ceremony at a nationally set low price in the Register Office, this is not impacted by the fee increases. The four other approved premises rooms at the Register Office are on a sliding scale of pricing allowing couples to make appropriate choices to suit their budget.

Step 4: Impact

4.1 How has the equality impact assessment informed or changed the proposal?

What are the main conclusions of this assessment? Use this section to provide an overview of your findings. This summary can be included in decision pathway reports etc.

If you have identified any significant negative impacts which cannot be mitigated, provide a justification showing how the proposal is proportionate, necessary, and appropriate despite this.

Summary of significant negative impacts and how they can be mitigated or justified:
Summary of positive impacts / opportunities to promote the Public Sector Equality Duty:

4.2 Action Plan

Use this section to set out any actions you have identified to improve data, mitigate issues, or maximise opportunities etc. If an action is to meet the needs of a particular protected group please specify this.

Improvement / action required	Responsible Officer	Timescale
All relevant EqlAs will be published on the Council’s website https://www.bristol.gov.uk/council-spending-performance/council-budgets and continue to be updated as appropriate.		

4.3 How will the impact of your proposal and actions be measured?

How will you know if you have been successful? Once the activity has been implemented this equality impact assessment should be periodically reviewed to make sure your changes have been effective your approach is still appropriate.

Our Equality and Inclusion Annual Progress Reports show what we have done to achieve the aims of our Equality and Inclusion policy and strategy, and the progress we have made including reporting on all relevant KPIs and workforce diversity [Equalities policy - bristol.gov.uk](https://www.bristol.gov.uk/equalities-policy)



The Equality and Inclusion Team need at least five working days to comment and feedback on your EqlA. EqlAs should only be marked as reviewed when they provide sufficient information for decision-makers on the equalities impact of the proposal. Please seek feedback and review from the [Equality and Inclusion Team](#) before requesting sign off from your Director¹.

Equality and Inclusion Team Review: Reviewed by the Equality and Inclusion Team	Director Sign-Off: Tim O’Gara
Date: 03/01/2023	4/1/23

¹ Review by the Equality and Inclusion Team confirms there is sufficient analysis for decision makers to consider the likely equality impacts at this stage. This is not an endorsement or approval of the proposal.

Equality Impact Assessment [version 2.10]



Title: Bristol Bus Fund	
<input checked="" type="checkbox"/> Budget Proposal	<input checked="" type="checkbox"/> New <input type="checkbox"/> Already exists / review <input type="checkbox"/> Changing
Directorate: Growth and Regeneration	Lead Officer name: Adam Crowther
Service Area: City Transport	Lead Officer role: Head of City Transport

Step 1: What do we want to do?

The purpose of an Equality Impact Assessment is to assist decision makers in understanding the impact of proposals as part of their duties under the Equality Act 2010. Detailed guidance to support completion can be found here [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#).

This assessment should be started at the beginning of the process by someone with a good knowledge of the proposal and service area, and sufficient influence over the proposal. It is good practice to take a team approach to completing the equality impact assessment. Please contact the [Equality and Inclusion Team](#) early for advice and feedback.

1.1 What are the aims and objectives/purpose of this proposal?

Briefly explain the purpose of the proposal and why it is needed. Describe who it is aimed at and the intended aims / outcomes. Where known also summarise the key actions you plan to undertake. Please use [plain English](#), avoiding jargon and acronyms. Equality Impact Assessments are viewed by a wide range of people including decision-makers and the wider public.

Budget context

Every year, the council must agree an annual budget which balances the money we spend with the money we are expecting to receive. Councils across the country are continuing to face financial challenges and based on our current forecasts, we face a funding gap over the next five years (to 2028/29) of up to £81.2 million dependent on the severity of factors such as inflation, funding changes, and unavoidable service pressures. This is in addition to the £17.7 million of savings and efficiencies proposals for 2024-2028 outlined in the 2023/24 budget and assumed delivery of 2023/24 savings in the current year.

The Council has defined statutory responsibilities, but deliver against a far broader agenda, providing universal services benefiting the whole community, and targeted services aimed at individuals, communities with particular needs, and businesses – administered by our workforce, city partners, stakeholder organisations and commissioned services.

To address these challenges we are looking across all of our services with a focus on:

- maximising our transformation programmes – where we are looking to improve services whilst achieving the best value for money
- income opportunities – where we are looking to improve our external income and most effectively apply that income
- targeted reviews – where we are looking at services that are comparatively high in cost compared to other councils to see where we can do things differently to reduce costs, be more efficient in how we do things and, in some cases, stop doing some things entirely.

This proposal: Bristol Bus Fund

This proposal is to replace existing general fund budget allocation for the West of England combined Authority (WECA) levy with net proceeds of the Clean Air Zone (CAZ) scheme. The WECA levy funds concessionary fares, Real Time Information, supported bus services and various other public transport related activities. This proposal related to the supported bus services element of the WECA levy. There would be no change to funding provision for supported buses but it would be funded by CAZ rather than the general fund. There will be additionality provided from CAZ funding to enable additional investment into bus services as part of the wider proposal that will be supplement this funding but this will be approved elsewhere.

1.2 Who will the proposal have the potential to affect?

<input type="checkbox"/> Bristol City Council workforce	<input type="checkbox"/> Service users	<input type="checkbox"/> The wider community
<input type="checkbox"/> Commissioned services	<input type="checkbox"/> City partners / Stakeholder organisations	
Additional comments: No impacts as no changes		

1.3 Will the proposal have an equality impact?

Yes No [please select]

Could the proposal affect access levels of representation or participation in a service, or does it have the potential to change e.g. quality of life: health, education, or standard of living etc.?

If 'No' explain why you are sure there will be no equality impact, then skip steps 2-4 and request review by Equality and Inclusion Team.

If 'Yes' complete the rest of this assessment, or if you plan to complete the assessment at a later stage please state this clearly here and request review by the Equality and Inclusion Team.

We have not identified any equality impact from the proposal at this stage, which is limited in scope as funding amount and activities remain the same, funds are just applied from different sources. This will not affect staff or service users.

Step 4: Impact

4.1 How has the equality impact assessment informed or changed the proposal?

What are the main conclusions of this assessment? Use this section to provide an overview of your findings. This summary can be included in decision pathway reports etc.

If you have identified any significant negative impacts which cannot be mitigated, provide a justification showing how the proposal is proportionate, necessary, and appropriate despite this.

Summary of significant negative impacts and how they can be mitigated or justified:

Summary of positive impacts / opportunities to promote the Public Sector Equality Duty:

4.2 Action Plan

Use this section to set out any actions you have identified to improve data, mitigate issues, or maximise opportunities etc. If an action is to meet the needs of a particular protected group please specify this.


Improvement / action required	Responsible Officer	Timescale
All relevant EqlAs will be published on the Council's website https://www.bristol.gov.uk/council-spending-performance/council-budgets and continue to be updated as appropriate.		

4.3 How will the impact of your proposal and actions be measured?

How will you know if you have been successful? Once the activity has been implemented this equality impact assessment should be periodically reviewed to make sure your changes have been effective your approach is still appropriate.

Our Equality and Inclusion Annual Progress Reports show what we have done to achieve the aims of our Equality and Inclusion policy and strategy, and the progress we have made including reporting on all relevant KPIs and workforce diversity [Equalities policy - bristol.gov.uk](https://www.bristol.gov.uk/equalities-policy)

The Equality and Inclusion Team need at least five working days to comment and feedback on your EqlA. EqlAs should only be marked as reviewed when they provide sufficient information for decision-makers on the equalities impact of the proposal. Please seek feedback and review from the [Equality and Inclusion Team](#) before requesting sign off from your Director¹.

<p>Equality and Inclusion Team Review:</p> <p>Reviewed by the Equality and Inclusion Team</p>	<p>Director Sign-Off:</p> 
Date: 10/01/2024	Date: 10.1.2024

¹ Review by the Equality and Inclusion Team confirms there is sufficient analysis for decision makers to consider the likely equality impacts at this stage. This is not an endorsement or approval of the proposal.

Equality Impact Assessment [version 2.10]



Title: Replace Transport Levy with CAZ	
<input checked="" type="checkbox"/> Budget Proposal	<input checked="" type="checkbox"/> New <input type="checkbox"/> Already exists / review <input type="checkbox"/> Changing
Directorate: Growth and Regeneration	Lead Officer name: Alex Hearn
Service Area: Economy Of Place	Lead Officer role: Director

Step 1: What do we want to do?

The purpose of an Equality Impact Assessment is to assist decision makers in understanding the impact of proposals as part of their duties under the Equality Act 2010. Detailed guidance to support completion can be found here [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#).

This assessment should be started at the beginning of the process by someone with a good knowledge of the proposal and service area, and sufficient influence over the proposal. It is good practice to take a team approach to completing the equality impact assessment. Please contact the [Equality and Inclusion Team](#) early for advice and feedback.

1.1 What are the aims and objectives/purpose of this proposal?

Briefly explain the purpose of the proposal and why it is needed. Describe who it is aimed at and the intended aims / outcomes. Where known also summarise the key actions you plan to undertake. Please use [plain English](#), avoiding jargon and acronyms. Equality Impact Assessments are viewed by a wide range of people including decision-makers and the wider public.

Budget context

Every year, Bristol City Council must agree an annual budget which balances the money we spend with the money we are expecting to receive. Councils across the country are continuing to face financial challenges, reflecting the economic context, including the significant inflationary environment, combined with continuing demand pressures and limitations on government funding. Based on our current forecasts, we face a funding gap over the next five years (to 2028/29) of £32.2 million. This is in addition to the £17.7 million of savings and efficiencies proposals for 2024-2028 outlined in the 2023/24 budget and assumed delivery of 2023/24 savings in the current year.

The Council has defined statutory responsibilities, but deliver against a far broader agenda, providing universal services benefiting the whole community, and targeted services aimed at individuals, communities with particular needs, and businesses – administered by our workforce, city partners, stakeholder organisations and commissioned services.

To address these challenges we are looking across all of our services with a focus on:

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- targeted reviews – where we are looking at services that are comparatively high in cost compared to other councils to see where we can do things differently to reduce costs, be more efficient in how we do things and, in some cases, stop doing some things entirely.

This proposal: Replace Transport Levy with Clean Air Zone funds

The proposal is to replace existing General Fund budget allocation for the West of England Combined Authority (WECA) levy with net proceeds of the Clean Air Zone scheme. The WECA levy funds concessionary fares, Real Time Information, supported bus services and various other public transport related activities. This proposal relates to activities helping to ensure bus services can continue to become a more reliable alternative to private car and support sustainable and inclusive economic growth through regeneration, in line with the Joint Local Transport Plan. There would be no change to any of these activities from the change as the funding is the same but comes from a different source.

1.2 Who will the proposal have the potential to affect?

<input type="checkbox"/> Bristol City Council workforce	<input type="checkbox"/> Service users	<input type="checkbox"/> The wider community
<input type="checkbox"/> Commissioned services	<input type="checkbox"/> City partners / Stakeholder organisations	
Additional comments: No impacts as no changes		

1.3 Will the proposal have an equality impact?

Yes No [please select]

Could the proposal affect access levels of representation or participation in a service, or does it have the potential to change e.g. quality of life: health, education, or standard of living etc.?

If 'No' explain why you are sure there will be no equality impact, then skip steps 2-4 and request review by Equality and Inclusion Team.

If 'Yes' complete the rest of this assessment, or if you plan to complete the assessment at a later stage please state this clearly here and request review by the Equality and Inclusion Team.

We have not identified any equality impact from the proposal, which is limited in scope as funding amounts and activities remain the same, funds are just applied from different sources. This will not affect staff or service users.

Step 4: Impact

4.1 How has the equality impact assessment informed or changed the proposal?

What are the main conclusions of this assessment? Use this section to provide an overview of your findings. This summary can be included in decision pathway reports etc.

If you have identified any significant negative impacts which cannot be mitigated, provide a justification showing how the proposal is proportionate, necessary, and appropriate despite this.

Summary of significant negative impacts and how they can be mitigated or justified:
Summary of positive impacts / opportunities to promote the Public Sector Equality Duty:

4.2 Action Plan

Use this section to set out any actions you have identified to improve data, mitigate issues, or maximise opportunities etc. If an action is to meet the needs of a particular protected group please specify this.


Improvement / action required	Responsible Officer	Timescale
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4.3 How will the impact of your proposal and actions be measured?

How will you know if you have been successful? Once the activity has been implemented this equality impact assessment should be periodically reviewed to make sure your changes have been effective your approach is still appropriate.

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Equality and Inclusion Team Review:	Director Sign-Off:
<i>Reviewed by the Equality and Inclusion Team</i>	
Date: 11/01/2023	Date: 11.1.2024

¹ Review by the Equality and Inclusion Team confirms there is sufficient analysis for decision makers to consider the likely equality impacts at this stage. This is not an endorsement or approval of the proposal.



Title: Bristol Local Transport Schemes	
<input checked="" type="checkbox"/> Budget Proposal	<input checked="" type="checkbox"/> New <input type="checkbox"/> Already exists / review <input type="checkbox"/> Changing
Directorate: G&R, EoP	Lead Officer name: Adam Crowther
Service Area: City Transport	Lead Officer role: Head of City Transport

Step 1: What do we want to do?

The purpose of an Equality Impact Assessment is to assist decision makers in understanding the impact of proposals as part of their duties under the Equality Act 2010. Detailed guidance to support completion can be found here [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#).

This assessment should be started at the beginning of the process by someone with a good knowledge of the proposal and service area, and sufficient influence over the proposal. It is good practice to take a team approach to completing the equality impact assessment. Please contact the [Equality and Inclusion Team](#) early for advice and feedback.

1.1 What are the aims and objectives/purpose of this proposal?

Briefly explain the purpose of the proposal and why it is needed. Describe who it is aimed at and the intended aims / outcomes. Where known also summarise the key actions you plan to undertake. Please use [plain English](#), avoiding jargon and acronyms. Equality Impact Assessments are viewed by a wide range of people including decision-makers and the wider public.

Budget context

Every year, the council must agree an annual budget which balances the money we spend with the money we are expecting to receive. Councils across the country are continuing to face financial challenges and based on our current forecasts, we face a funding gap over the next five years (to 2028/29) of up to £81.2 million dependent on the severity of factors such as inflation, funding changes, and unavoidable service pressures. This is in addition to the £17.7 million of savings and efficiencies proposals for 2024-2028 outlined in the 2023/24 budget and assumed delivery of 2023/24 savings in the current year.

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To address these challenges we are looking across all of our services with a focus on:

- maximising our transformation programmes – where we are looking to improve services whilst achieving the best value for money
- income opportunities – where we are looking to improve our external income and most effectively apply that income
- targeted reviews – where we are looking at services that are comparatively high in cost compared to other councils to see where we can do things differently to reduce costs, be more efficient in how we do things and, in some cases, stop doing some things entirely.

This proposal

This proposal is regarding the City Transport service. The proposal assumes funding is provided to deliver local transport schemes such as dropped kerbs, crossing points, waiting restrictions and road closures. This will enable full recharging of staff time to project cost budgets. Restructuring of elements of the City Transport service to deliver said schemes will also result in additional capital recharge income from those projects. This is capital funded work from a variety of sources and some new funding via Clean Air Zone (CAZ) is expected to enable the scheme delivery, outlined above.

The restructuring process will compromise recruiting to vacant posts and introducing some new posts. No current roles will be put at risk. We will use the recruitment process to support wider equality objectives such as 'diversifying the workforce' and try and address under-representations within the service. The restructure is designed to deliver work more effectively through an enhanced capacity, ensuring the efficient use of resources. Recruitment to posts will follow the usual Human Resource processes developed within the council to ensure due diligence and equalities processes are adhered to.

1.2 Who will the proposal have the potential to affect?

<input checked="" type="checkbox"/> Bristol City Council workforce	<input checked="" type="checkbox"/> Service users	<input checked="" type="checkbox"/> The wider community
<input type="checkbox"/> Commissioned services	<input checked="" type="checkbox"/> City partners / Stakeholder organisations	
Additional comments: Impacts mainly through improved and accelerated scheme delivery		

1.3 Will the proposal have an equality impact?

<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	[please select]
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Could the proposal affect access levels of representation or participation in a service, or does it have the potential to change e.g. quality of life: health, education, or standard of living etc.?

If 'No' explain why you are sure there will be no equality impact, then skip steps 2-4 and request review by Equality and Inclusion Team.

If 'Yes' complete the rest of this assessment, or if you plan to complete the assessment at a later stage please state this clearly here and request review by the Equality and Inclusion Team.

The proposed saving is an outcome of fully capturing the capital recharge income from existing staff that is not captured currently. This is where staff time is charged against the a project budget to cover costs. The intention is for additional CAZ income to fund some of the budget required for this recharge work but that is part of a separate proposal. The saving itself does not have any equalities impacts or significant internal staff impacts.

Step 4: Impact

4.1 How has the equality impact assessment informed or changed the proposal?

What are the main conclusions of this assessment? Use this section to provide an overview of your findings. This summary can be included in decision pathway reports.

If you have identified any significant negative impacts which cannot be mitigated, provide a justification showing how the proposal is proportionate, necessary, and appropriate despite this.

Summary of significant negative impacts and how they can be mitigated or justified:
Summary of positive impacts / opportunities to promote the Public Sector Equality Duty:

4.2 Action Plan

Use this section to set out any actions you have identified to improve data, mitigate issues, or maximise opportunities etc. If an action is to meet the needs of a particular protected group please specify this.


Improvement / action required	Responsible Officer	Timescale
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4.3 How will the impact of your proposal and actions be measured?

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The Equality and Inclusion Team need at least five working days to comment and feedback on your EqlA. EqlAs should only be marked as reviewed when they provide sufficient information for decision-makers on the equalities impact of the proposal. Please seek feedback and review from the [Equality and Inclusion Team](#) before requesting sign off from your Director¹.

Equality and Inclusion Team Review:	Director Sign-Off:
Reviewed by the Equality and Inclusion Team	
Date: 08/01/2023	Date: 10.1.2024

¹ Review by the Equality and Inclusion Team confirms there is sufficient analysis for decision makers to consider the likely equality impacts at this stage. This is not an endorsement or approval of the proposal.

Equality Impact Assessment [version 2.10]



Title: GAP046: Communities saving	
<input checked="" type="checkbox"/> Budget Proposal	<input type="checkbox"/> New <input checked="" type="checkbox"/> Already exists / review <input type="checkbox"/> Changing
Directorate: Adults and Communities	Lead Officer name: Penny Germon
Service Area: Communities	Lead Officer role: Communities Head of Service

Step 1: What do we want to do?

The purpose of an Equality Impact Assessment is to assist decision makers in understanding the impact of proposals as part of their duties under the Equality Act 2010. Detailed guidance to support completion can be found here [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#).

This assessment should be started at the beginning of the process by someone with a good knowledge of the proposal and service area, and sufficient influence over the proposal. It is good practice to take a team approach to completing the equality impact assessment. Please contact the [Equality and Inclusion Team](#) early for advice and feedback.

1.1 What are the aims and objectives/purpose of this proposal?

Briefly explain the purpose of the proposal and why it is needed. Describe who it is aimed at and the intended aims / outcomes. Where known also summarise the key actions you plan to undertake. Please use [plain English](#), avoiding jargon and acronyms. Equality Impact Assessments are viewed by a wide range of people including decision-makers and the wider public.

Budget context

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This proposal

This is an operational budget supporting the capacity and delivery of the city councils Communities annual service plan . The Communities service is about taking positive action to advance equity, build strong empowered communities and facilitate collaboration between the council and Bristol's diverse communities.

The service includes Community Development which has two teams – North and South of the city working in 12 priority neighbourhoods and with citywide equality communities through asset based community development which includes connecting people to each other and to opportunities such as Black History events and welcoming spaces supporting social action on community priorities, training people in community development and engaging communities in shaping where they live e.g. Temple Quarter and making Safer Streets. The team supports the wider council to connect with communities and involve people and community organisations in the work of the council.

The service plays a role in understanding the needs of local communities and feeding this learning back into the council. The 12 neighbourhoods the team works with include; – Lawrence Weston, Henbury, St Pauls, Easton, Oldbury Court and Hillfields, Redcliffe, Bedminster (East and South), Knowle West/Filwood, Hartcliffe, Withywood and Stockwood. Some of these neighbourhoods are known to be the most deprived areas in Bristol (Hartcliffe, Knowle West and Filwood – [Deprivation 2019](#)).

The team also works with city wide communities experiencing inequity including Black and minoritised communities, Disabled people, LGBTQ+ communities, women and younger adults. This includes supporting communities to come together where they live, supporting one another and taking action on the things they care about, for example, a group of Disabled people meet in Bedminster, working with Bristol Disability Equality Forum and Black Southwest Network, and supporting a network of community champions and faith leaders.

We work with a wide and diverse network of citizens and organise to respond to challenges and emergencies such as the cost of living crisis ensuring those who are most excluded and disenfranchised are involved and supported. The service supports the development of community infrastructure through grants for example funding a network of community hubs.

This is an operational budget which supports the delivery of the annual service plan and developed through our work with communities. It can include work which helps the capacity of the team for example buying in expertise and collaborating with communities on projects, for example, People Power.

To make this saving we will not deliver planned new community development programmes in 24/25. No work will stop as a result of this saving.

Although no specific disproportionate, negative impacts have been identified at this stage due to work priorities not being set, there is likely to be an impact on equalities. This cannot be determined at this stage due to work streams not being identified. Overall, the Communities Service has a key focus on improving equalities. The service works with neighbourhoods and communities who experience inequity supporting them to connect with each other, take action on the things they care about and involve them in decisions which impact on their lives. This also enables the council to connect with communities and understand emerging issues that are relevant for service users. The future impact of this work no

longer being delivered cannot be determined at this stage, and will be additionally captured in the cumulative impact for the budget proposals 2024/25.

1.2 Who will the proposal have the potential to affect?

<input type="checkbox"/> Bristol City Council workforce	<input type="checkbox"/> Service users	<input checked="" type="checkbox"/> The wider community
<input type="checkbox"/> Commissioned services	<input checked="" type="checkbox"/> City partners / Stakeholder organisations	
Additional comments:		

1.3 Will the proposal have an equality impact?

Yes **No** [please select]

Could the proposal affect access levels of representation or participation in a service, or does it have the potential to change e.g. quality of life: health, education, or standard of living etc.?

If 'No' explain why you are sure there will be no equality impact, then skip steps 2-4 and request review by Equality and Inclusion Team.

If 'Yes' complete the rest of this assessment, or if you plan to complete the assessment at a later stage please state this clearly here and request review by the Equality and Inclusion Team.

Step 2: What information do we have?

2.1 What data or evidence is there which tells us who is, or could be affected?

Please use this section to demonstrate an understanding of who could be affected by the proposal. Include general population data where appropriate, and information about people who will be affected with particular reference to protected and other relevant characteristics: [How we measure equality and diversity \(bristol.gov.uk\)](http://bristol.gov.uk)

Use one row for each evidence source and say which characteristic(s) it relates to. You can include a mix of qualitative and quantitative data e.g. from national or local research, available data or previous consultations and engagement activities.

Outline whether there is any over or under representation of equality groups within relevant services - don't forget to benchmark to the local population where appropriate. Links to available data and reports are here [Data, statistics and intelligence \(sharepoint.com\)](#). See also: [Bristol Open Data \(Quality of Life, Census etc.\)](#); [Joint Strategic Needs Assessment \(JSNA\)](#); [Ward Statistical Profiles](#).

For workforce / management of change proposals you will need to look at the diversity of the affected teams using available evidence such as [HR Analytics: Power BI Reports \(sharepoint.com\)](#) which shows the diversity profile of council teams and service areas. Identify any over or under-representation compared with Bristol economically active citizens for different characteristics. Additional sources of useful workforce evidence include the [Employee Staff Survey Report](#) and [Stress Risk Assessment Form](#)

Data / Evidence Source [Include a reference where known]	Summary of what this tells us
Census 2021	The Census details the demographic profile of Bristol.

<p><u>The population of Bristol</u></p> <p><u>Bristol Key Facts 2022</u></p>	<p>Updated annually. The report brings together statistics on the current estimated population of Bristol, recent trends in population, future projections and looks at the key characteristics of the people living in Bristol.</p> <p>Population Profiles for Equalities Groups bring together detailed analysis looking at equalities groups and how they differ in relation to age, health, employment, education and housing, and maps the distribution of equalities groups across the city.</p>																				
<p><u>Ward profile data (bristol.gov.uk)</u></p>	<p>The Ward Profiles provide a range of data-sets, including population, life expectancy, health and education disparities etc. for each of Bristol’s electoral wards.</p>																				
<p><u>Bristol Quality of Life Survey 2021-22</u></p>	<p>The Quality of Life (QoL) survey is an annual randomised sample survey of the Bristol population, mailed to 33,000 households (with online & paper options), and some additional targeting to boost numbers from low responding groups. In brief, the most recent QoL survey indicated that inequality and deprivation continue to affect people’s experience in almost every element measured by the survey.</p> <p>The <u>Quality of Life 2021/22 data dashboard</u> highlights those indicators, wards and equality and demographic groups which are better or worse than the Bristol average.</p> <p>For example there are significant disparities based on people’s characteristics and circumstances in the extent to which they find it difficult to manage financially:</p> <table border="1" data-bbox="655 1265 1501 2121"> <thead> <tr> <th>Quality of Life Indicator</th> <th>% who find it difficult to manage financially</th> </tr> </thead> <tbody> <tr> <td>16 to 24 years</td> <td>12.5</td> </tr> <tr> <td>50 years and older</td> <td>6.7</td> </tr> <tr> <td>65 years and older</td> <td>3.2</td> </tr> <tr> <td>Female</td> <td>8.6</td> </tr> <tr> <td>Male</td> <td>8.5</td> </tr> <tr> <td>Disabled</td> <td>21.6</td> </tr> <tr> <td>Asian /Asian British</td> <td>9.9</td> </tr> <tr> <td>Black/Black British</td> <td>19.8</td> </tr> <tr> <td>Mixed/Multiple Ethnicity</td> <td>16.3</td> </tr> </tbody> </table>	Quality of Life Indicator	% who find it difficult to manage financially	16 to 24 years	12.5	50 years and older	6.7	65 years and older	3.2	Female	8.6	Male	8.5	Disabled	21.6	Asian /Asian British	9.9	Black/Black British	19.8	Mixed/Multiple Ethnicity	16.3
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	White British	7.8
	White Minority Ethnic	8.4
	Lesbian Gay or Bisexual	12.7
	No Religion or Faith	8.0
	Christian Religion	8.3
	Other Religions	18.2
	Carer	10.7
	Full Time Carer	14.0
	Part Time Carer	9.7
	Single Parent	28.6
	Two Parent	9.6
	Parent (all)	12.0
	No Qualifications	10.0
	Non-Degree Qualified	12.9
	Degree Qualified	6.7
	Rented (Council)	20.3
	Rented (HA)	20.6
	Rented (Private)	14.6
	Owner Occupier	4.6
	Most Deprived 10%	18.8
	Bristol Average	8.7

Joint Strategic Needs Assessment (JSNA)

The Joint Strategic Needs Assessment reports on the health and wellbeing needs of the people of Bristol. It brings together detailed information on local health and wellbeing needs and looks ahead at emerging challenges and projected future needs. The JSNA is used to provide a comprehensive picture of the health and wellbeing needs of Bristol (now and in the future); to inform decisions about how we design, commission and deliver services, and also about how the urban environment is planned and managed; to improve and protect health and wellbeing outcomes across the city while reducing health inequalities; and to provide partner organisations with information on the changing health and wellbeing needs of Bristol, at a local level, to support better service delivery.

Nomis - Official Labour Market Statistics (nomisweb.co.uk)
Business demography, UK - Office for National Statistics (ons.gov.uk)

84% of all people in Bristol are economically active which is higher than nationally (78.6%) and in the South West (80.7%). Of economically active people in Bristol 6.9% are self-employed, compared to 9.5% nationally. Of those who are economically inactive in Bristol, 33% are Students, 29% are 'long-term sick' and 16% are looking after family/home, as well as 9.2% who are retired. The percentage of 'workless households' in Bristol is 12.1%, compared to 13.6% nationally, and the proportion of working age people who are benefit claimants is 11.2%. Bristol has a higher proportion of people working in 'professional

	<p>occupations’ (36.2) than for the South West (24.4%) and nationally (25.8%).</p> <p>In 2020 (most recent data) the South West continued to have the highest five-year ‘survival rate’ in the UK of businesses that survived into 2020 (this has been the case since 2012). The largest proportion of these surviving businesses, 22%, was in the professional, scientific and technical industry.</p>
<p><u>Bristol One City: Cost of Living Crisis – Bristol’s One City approach to supporting citizens and communities (Oct 2022)</u></p>	<p>The rising cost of living is not impacting on everyone equally. People who are already experiencing inequity and poverty will be disproportionately impacted:</p> <ul style="list-style-type: none"> • People on the lowest incomes - will have less available income but also pay more for the same services. For example, people unable to pay their bills by Direct Debit and those borrowing money are subject to higher costs and interest rates. This is what anti-poverty campaign group Fair by Design has referred to as a Poverty Premium • Households with pre-payment energy meters - households with pre-payment meters often pay above-average costs for their fuel. They will face a significant rise in their monthly bills in autumn and winter with increased energy usage as they do not benefit from the “smoothing” effect of Direct Debits, which spread usage costs evenly across the year • Parents and young families – parents of young children are more likely to seek credit and alternative support as they are less able, on average, to afford an unexpected expense. Single parents will be disproportionately affected; and one in four single parents find it difficult to manage financially (28.6%). • Disabled people – just under half of all people in poverty in the UK are Disabled people or someone living with a Disabled person. Disabled people have higher living costs, and tend to pay more for their heating, travel, food/diet, prescription payments, and specialist equipment. It is estimated that UK households that include Disabled children pay on average £600 more for their energy bills than an average household • Black and Minoritised people – A higher proportion of Black and minoritised ethnic groups reported finding it difficult to manage financially (14.9%) in 2021. In 2020 the Social Metrics Commission found that almost half of people living in a family in the UK where the head of the household is Black are in poverty. Age UK report that poverty among older Black and minoritised ethnic groups is twice as high as for white pensioners • People in rented accommodation – it is estimated that 69% of low-income private renters in England will be forced to go without food and heating at least one day per week to meet rising housing and living cost. Almost three in ten homes in Bristol are privately rented • Underserved populations - It is likely that populations that are not typically well represented in data and research are

	likely to also face increased risk from rising cost of living. For example, refugees and asylum seekers, people experiencing homelessness, and Gypsy/Roma/Traveller groups.
<p><u>An evaluation of the Bristol Race Equality Covid-19 Steering Group</u></p> <p><u>Designing a new social reality - Research on the impact of covid-19 on Bristol's VCSE sector and what the future should be – Black South West Network 2020</u></p> <p><u>Delivering an inclusive economy post COVID-19</u></p>	<p>Report focusing on how co-production using a One City approach has been used to respond to the disproportionate impact of the Covid-19 pandemic on our marginalized ethnic communities.</p> <p>Local research has highlighted how long-term underinvestment and lack of equity in funding and procurement has eroded the local Voluntary and community sector.</p> <p>Our local partners have conducted research into the ongoing impact of COVID-19 for women and have provided recommendations on what service providers can do to reduce impact further impact.</p>
<p>Additional comments:</p> <p>The service works with all communities experiencing inequity.</p>	

2.2 Do you currently monitor relevant activity by the following protected characteristics?

<input type="checkbox"/> Age	<input type="checkbox"/> Disability	<input type="checkbox"/> Gender Reassignment
<input type="checkbox"/> Marriage and Civil Partnership	<input type="checkbox"/> Pregnancy/Maternity	<input type="checkbox"/> Race
<input type="checkbox"/> Religion or Belief	<input type="checkbox"/> Sex	<input type="checkbox"/> Sexual Orientation

2.3 Are there any gaps in the evidence base?

Where there are gaps in the evidence, or you don't have enough information about some equality groups, include an equality action to find out in section 4.2 below. This doesn't mean that you can't complete the assessment without the information, but you need to follow up the action and if necessary, review the assessment later. If you are unable to fill in the gaps, then state this clearly with a justification.

For workforce related proposals all relevant characteristics may not be included in HR diversity reporting (e.g. pregnancy/maternity). For smaller teams diversity data may be redacted. A high proportion of not known/not disclosed may require an action to address under-reporting.

Although our corporate approach is to collect diversity monitoring for all relevant characteristics, there are gaps in the available local diversity data for some characteristics, especially where this has not always historically been included in census and statutory reporting e.g. for sexual orientation.

2.4 How have you involved communities and groups that could be affected?

You will nearly always need to involve and consult with internal and external stakeholders during your assessment. The extent of the engagement will depend on the nature of the proposal or change. This should usually include individuals and groups representing different relevant protected characteristics. Please include details of any completed engagement and consultation and how representative this had been of Bristol's diverse communities.

Include the main findings of any engagement and consultation in Section 2.1 above.

If you are managing a workforce change process or restructure please refer to [Managing change or restructure \(sharepoint.com\)](#) for advice on consulting with employees etc. Relevant stakeholders for engagement about workforce changes may include e.g. staff-led groups and trades unions as well as affected staff.

We launched a public consultation on our budget proposals between 09th November 2023 to the 21st December 2023. This consultation set out all the savings proposals we had identified to produce a balanced budget in the context of reduced available funding and increasing financial pressures.

There has been no further consultation or engagement about this proposal. The saving will mean there is less capacity to work with equality groups to support their empowerment and self-determination.

2.5 How will engagement with stakeholders continue?

Explain how you will continue to engage with stakeholders throughout the course of planning and delivery. Please describe where more engagement and consultation is required and set out how you intend to undertake it. Include any targeted work to seek the views of under-represented groups. If you do not intend to undertake it, please set out your justification. You can ask the Equality and Inclusion Team for help in targeting particular groups.

All responses to the Budget Consultation will be analysed and included in the Council's Budget report that will be published on the Bristol City Council website in early 2023. We will take Budget consultation responses into account when developing this and other final proposals to put to the Cabinet and a meeting of the Full Council for approval. The final decision will be taken by Full Council at its budget setting meeting in February / March 2024.

Step 3: Who might the proposal impact?

Analysis of impacts must be rigorous. Please demonstrate your analysis of any impacts of the proposal in this section, referring to evidence you have gathered above, and the characteristics protected by the Equality Act 2010. Also include details of existing issues for particular groups that you are aware of and are seeking to address or mitigate through this proposal. See detailed guidance documents for advice on identifying potential impacts etc. [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#)

3.1 Does the proposal have any potentially adverse impacts on people based on their protected or other relevant characteristics?

Consider sub-categories (different kinds of disability, ethnic background etc.) and how people with combined characteristics (e.g. young women) might have particular needs or experience particular kinds of disadvantage.

Where mitigations indicate a follow-on action, include this in the 'Action Plan' Section 4.2 below.

GENERAL COMMENTS (highlight any potential issues that might impact all or many groups)

Even when we plan to consult in more detail on specific service delivery proposals at a later time, we must ensure that any budget setting decisions that are likely to affect future services are informed by sufficient consultation and proper analysis. This is so that decision makers can have due regard to any likely disproportionate or negative impact on the basis of their protected and other relevant characteristics at the time the budget is approved – not afterwards¹.

Decision makers will have the ability to make changes to the individual spending plans following further consultation as appropriate and detailed evaluation of the impact of specific proposals. Within the proposed budget envelope there will be financial mitigation put aside for any non-delivery or amendments to proposals which may occur due to future consideration of equalities issues or other factors.

As well as identifying whether budget changes will have a disproportionate impact on particular groups (e.g., because they are over-represented in a particular cohort), we need to pay particular attention to the risk of indirect discrimination: when an apparently neutral decision puts members of a given group at a particular disadvantage compared with other people because of their different needs and circumstances.

We are also aware of existing structural inequalities and particular considerations, issues, and disparities for people in Bristol based on their characteristics, which we will take into account.

This saving reduces the capacity of the Communities Service to carry out work which promotes and facilitates positive action and empowerment of equality communities. The specific equalities impact and mitigations cannot be determined at this stage due to work streams not being identified. Overall, the community development team has a key focus on improving equalities. The community development team works with neighbourhoods and communities who experience inequity supporting them to connect with each other, take action on the things they care about and involve them in decisions which impact on their lives. The future impact of this work no longer being delivered and any mitigations cannot be determined at this stage.

PROTECTED CHARACTERISTICS

Age: Young People	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • Young people are often under-represented in engagement and consultation in Bristol and are less satisfied than average with the way the council runs things. • Children and young people in Bristol are considerably more ethnically diverse than the overall population of Bristol. • Children and young people from the most deprived areas of Bristol have the poorest outcomes in health and education in terms of health, education and future employment etc. • Young people in Bristol are more likely to: <ul style="list-style-type: none"> ○ have poor emotional health and wellbeing ○ find inaccessible public transport prevents them from leaving their home when they want to ○ 6.8% of 16-17 year olds (2020/21) were “not in education, employment or training” (NEET), worse than the national average (5.5%) • Young adults are most likely to have lost work or seen their income drop because of COVID-19 and the cost of living crisis
Mitigations:	See general comments above
Age: Older People	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • Older people in Bristol are: <ul style="list-style-type: none"> ○ less likely to be comfortable using digital services ○ more reliant on public and community transport ○ more likely to be an unpaid carer ○ more likely to help out or volunteer in their community ○ less likely to have formal qualifications • Bristol Ageing Better estimated at least 11,000 older people are experiencing isolation in the city. • We must factor aging and the needs of older people into long term budgeting and service design
Mitigations:	See general comments above
Disability	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • 17% of Bristol’s population are disabled. There are more disabled women than men living in Bristol. • In 2021, the disability pay gap was 13.8% with disabled employees earning a median of £12.10 per hour and non-disabled employees a median of £14.03 per hour.

	<ul style="list-style-type: none"> • Disabled people are less likely to be employed in a managerial or professional occupation • the national disability employment rate was 52.7% in Q2 2021, compared to 81.0% for non-disabled people. • Disabled workers move out of work at nearly twice the rate (8.8%) of non-disabled workers (4.9%). Workless disabled people move into work at nearly one-third of the rate (11.0%) of workless non-disabled people (26.9%) • Disability increases with age: 4.1% of all children, for the working age population it increases to 12.3% and for people aged 65 and over it increases to 55.9%. • Disabled people on average have lower qualification levels than the population as a whole. • A higher proportion of disabled people rent from a social provider (local authority or housing association) • Disabled people have lower car ownership levels • Disabled people experience higher rates of hate crime and domestic abuse compared to the general population • Disabled people should be empowered to make independent living choices and have a say in access to service provision. • Budget setting needs to provide sufficient resource and flexibility to meet our legal duty to make anticipatory and responsive reasonable adjustments for disabled people including: <ul style="list-style-type: none"> ○ changing the way things are done e.g. opening / working times; ○ changes to overcome barriers created by the physical features of premises. ○ providing auxiliary aids e.g. extra equipment or a different or additional service. ○ is 'anticipatory' so we must think in advance and ongoing about what disabled people might reasonably need. • Disabled people must not be charged for their reasonable adjustments, accessible formats or other adaptations. It is a legal requirement under the Equalities Act to ensure information is accessible to disabled employees and service users.
Mitigations:	See general comments above
Sex	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • The average UK pay gap is 15.4% in favour of men. The South West average is 16.6% with women paid 83p for every £1 earned by male counterparts. • Women still bear the majority of caring responsibilities for both children and older relatives. • Women are more likely to be excluded from conversations which affect decision making due to lack of representation in boards / organisational leadership. • Services and workplace requirements may not take into consideration the impact of women's reproductive life course including menstruation, avoiding pregnancy, pregnancy, childbirth, breastfeeding, and menopause. • Young women between the ages of 16 and 24 have higher risk of common mental health problems and higher rates of self-harm and post-traumatic stress disorder etc. • Bristol female preventable mortality rates are significantly higher than the England rates • Nationally 27% of women experience domestic abuse in their lifetimes. The rate of recorded domestic abuse incidents in Bristol has shown a significant rise over the last two years and 74% of victims were female. • Men and boy's health is in general poorer than that of women and girl's • Male life expectancy at birth in Bristol is around four years less than for females.

	<ul style="list-style-type: none"> • On average men in Bristol live 18 years in poor health, women live 22 years in poor health • A higher proportion of boys have physical impairments and more boys than girls have diagnosed mental health disorders and learning difficulties. • Men in Bristol are more likely than women to have unhealthy lifestyle behaviours including being overweight and obese, smoking, alcohol and substance misuse • There are differences between men and women in health practices and the way they use health services • Men are three times more likely than women to take their own lives.
Mitigations:	See general comments above
Sexual orientation	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • Lesbian, gay and bisexual people are statistically more vulnerable to verbal and physical abuse • 1 in 5 Lesbian, Gay, Bisexual and Trans (LGBT) staff have been the target of negative comments or conduct from work colleagues in the last year because they're LGBT. • More than a third of LGBT staff have hidden or disguised that they're LGBT at work in the last year because they were afraid of discrimination. • 1 in 10 Black, Asian and Minority Ethnic LGBT staff have similarly been physically attacked because of their sexual orientation and /or gender identity, compared to 3% of White LGBT staff • One in four lesbian and bisexual women have experienced domestic abuse in a relationship, one third of them were abused by a man. Almost half of all gay and bisexual men have experienced at least one incident of domestic abuse from either a family member or a partner since the age of 16. • Research shows LGBT people face widespread discrimination in healthcare settings and one in seven LGBT people avoid seeking healthcare for fear of discrimination from staff • The Stonewall LGBT in Britain - Health Report shows LGBT people are at greater risk of marginalisation during health crises, and those with multiple marginalised identities can struggle even more. In communications we should signpost and refer where possible to mutual aid and community support networks². • Research has shown that LGBT people are more likely to be living with long-term health conditions, are more likely to smoke, and have higher rates of drug and alcohol use. • Half of LGBT people experienced depression in the last year • 14% of LGBT people have avoided treatment for fear of discrimination because they are LGBT.
Mitigations:	See general comments above
Pregnancy / Maternity	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • The Equality Act 2010 applies to those who are pregnant or have given birth in the past 26 weeks, as well as making provisions to protect the rights of breastfeeding mothers. • Around 80% of women will give birth and many women will also experience termination, miscarriage and stillbirth • In the workplace we need to ensure equal access to recruitment, personal development, promotion and retention for employees who are pregnant or on maternity leave (including briefing and updates for any workforce changes) • Ensure there is equality of opportunity for services in relation to pregnancy and maternity. This includes e.g. providing physical access when using prams and pushchairs, and availability of toilets and baby-changing facilities etc. , and flexible working patterns and service times for childcare arrangements • Women from minoritised ethnic backgrounds are more likely to experience complications at birth

Mitigations:	See general comments above
Gender reassignment	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> As sexual orientation above trans people are statistically more vulnerable to verbal and physical abuse. Trans people regularly face prejudice and discrimination because of the way in which they transgress many of the norms of our culture and society. 1 in 8 trans people (12%) in the workplace have been physically attacked by customers or colleagues in the last year because they were trans
Mitigations:	See general comments above
Race	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> Ethnic minorities in Bristol experience greater disadvantage than in England and Wales as a whole in education and employment and this is particularly so for Black African people². In the last census (2011) 16% of the population belonged to a Black, Asian or minority ethnic group and this is likely to be higher now. The top three countries of birth outside UK for Bristol residents are Poland, Somalia and India. Although the race or ethnicity pay gap has narrowed in recent years there are still wide pay differences between particular ethnic groups and most minority ethnic groups earn less on average than White British people. Bangladeshi, Pakistani, and Black ethnic groups are more likely to live in deprived neighbourhoods; and the same groups and Chinese ethnicities are about twice as likely to live on a low income and experience child poverty compared to White groups Black, Asian and minoritised ethnic households are less likely to own their home and more likely to living in overcrowded housing and intergenerational households. Bangladeshi and Pakistani groups are more likely to live in multi-family households. Black people in the UK are less likely to hold a driving licence and more likely to rely on public transport. Black, Asian and minority ethnic groups in Bristol are more likely to find inaccessible public transport prevents them from leaving their home when they want to Black African young people are disadvantaged in education compared to their White peers⁸. A disproportionately high percentage of Bristol school pupils from Black, Asian and minority ethnic backgrounds are excluded from school and In Bristol pupils with the lowest 'Attainment 8' scores are from Black ethnic background (highest from Chinese ethnic background.) Organisations may lack cultural competence because minoritised ethnic staff are under- represented. People from Black African, Other, and Black Caribbean groups have persistently high levels of unemployment and almost all ethnic minority groups in Bristol experience employment inequality when compared to White British people. Black Asian and other minoritised ethnic groups are more likely to be self-employed than the Bristol average and over-represented in low income self-employment including taxis, takeaway restaurants People from minoritised ethnic backgrounds are underrepresented in political and civic leadership. People who do not speak English as a main language may require information in plain English and community language translations or videos etc.
Mitigations:	See general comments above
Religion or Belief	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> There are at least 45 religions represented in Bristol. Approximately 1 in 20 people in Bristol are Muslim, and Islam is the second religion in Bristol after Christianity

	<ul style="list-style-type: none"> Budget proposals should take into account differing needs because of people's religion and belief (for example different requirements around diet, life events, and holidays) Having a designated multi-faith room can make environments such as workplaces and shopping centres is more accessible and friendly for people from faith groups where regular prayer is required.
Mitigations:	See general comments above
Marriage & civil partnership	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	
Mitigations:	
OTHER RELEVANT CHARACTERISTICS	
Socio-Economic (deprivation)	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> Bristol has 41 areas in the most deprived 10% in England, including 3 in the most deprived 1%. The greatest levels of deprivation are in Hartcliffe & Withywood, Filwood and Lawrence Hill. In Bristol 15% of residents - 70,800 people - live in the 10% most deprived areas in England, including 19,000 children and 7,800 older people. There are an estimated 29,045 households living in fuel poverty in Bristol, 14.4% of all households (BEIS, 2022) 4.6% of households have experienced moderate to severe food insecurity, rising to 11.2% in the most deprived areas of the city (QoL 2021-22) 34.6% of people in Bristol are dissatisfied with the way the Council runs things, but this is 47.5% for people living in the most deprived areas of the city (QoL 2021-22). The inequalities gap in life expectancy between the most and least deprived areas in Bristol is 9.9 years for men and 6.7 years for women.
Mitigations:	See general comments above
Carers	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> Being a carer can be a huge barrier to accessing services and maintaining employment We need to consider the timing/availability of services, events etc. to allow flexibility for carers. As with Disability and Pregnancy and Maternity – policies which aim to restrict driving or parking can have a disproportionate impact on people who are reliant on having their own transport. Studies show around 65% of adults have provided unpaid care for a loved one. Women have a 50% likelihood of being an unpaid carer by the age of 46 (by age 57 for men) Young carers are often hidden and may not recognise themselves as carers.
Mitigations:	See general comments above
Other groups [Please add additional rows below to detail the impact for other relevant groups as appropriate e.g. Asylums and Refugees; Looked after Children / Care Leavers; Homelessness]	
Potential impacts:	
Mitigations:	

3.2 Does the proposal create any benefits for people based on their protected or other relevant characteristics?

Outline any potential benefits of the proposal and how they can be maximised. Identify how the proposal will support our [Public Sector Equality Duty](#) to:

- ✓ Eliminate unlawful discrimination for a protected group
- ✓ Advance equality of opportunity between people who share a protected characteristic and those who don't

- ✓ Foster good relations between people who share a protected characteristic and those who don't

The scale of the potential gap in our core funding means that there is very limited opportunity to bring genuine additional benefit to equalities groups in the circumstances. However we have considered as far as possible the need to: eliminate discrimination, harassment, victimisation and any other conduct prohibited under the Equality Act 2010; advance equality of opportunity between people from different groups; and foster good relations between people from different groups.

Our budget savings proposals are aligned to our Corporate Strategy and although we have limited resources our future focus will be on achieving those priorities we have identified including tackling poverty and intergenerational inequality.

Step 4: Impact

4.1 How has the equality impact assessment informed or changed the proposal?

What are the main conclusions of this assessment? Use this section to provide an overview of your findings. This summary can be included in decision pathway reports etc.

If you have identified any significant negative impacts which cannot be mitigated, provide a justification showing how the proposal is proportionate, necessary, and appropriate despite this.

Summary of significant negative impacts and how they can be mitigated or justified:
--

No mitigations have been identified due to work streams not yet being set.
--

Summary of positive impacts / opportunities to promote the Public Sector Equality Duty:
--

4.2 Action Plan

Use this section to set out any actions you have identified to improve data, mitigate issues, or maximise opportunities etc. If an action is to meet the needs of a particular protected group please specify this.

Improvement / action required	Responsible Officer	Timescale
All relevant EqlAs will be published on the Council's website https://www.bristol.gov.uk/council-spending-performance/council-budgets and continue to be updated as appropriate.		

4.3 How will the impact of your proposal and actions be measured?

How will you know if you have been successful? Once the activity has been implemented this equality impact assessment should be periodically reviewed to make sure your changes have been effective your approach is still appropriate.

Our Equality and Inclusion Annual Progress Reports show what we have done to achieve the aims of our Equality and Inclusion policy and strategy, and the progress we have made including reporting on all relevant KPIs and workforce diversity Equalities policy - bristol.gov.uk

The Equality and Inclusion Team need at least five working days to comment and feedback on your EqlA. EqlAs should only be marked as reviewed when they provide sufficient information for decision-makers on the equalities

impact of the proposal. Please seek feedback and review from the [Equality and Inclusion Team](#) before requesting sign off from your Director¹.

Equality and Inclusion Team Review: <i>Reviewed by the Equality and Inclusion Team</i>	Director Sign-Off: Christina Gray
Date: 03/01/2023	Date: 11.1.24

¹ Review by the Equality and Inclusion Team confirms there is sufficient analysis for decision makers to consider the likely equality impacts at this stage. This is not an endorsement or approval of the proposal.

Equality Impact Assessment [version 2.10]



Title: Professional Services & Consultancy Contract Rebate	
<input checked="" type="checkbox"/> Budget Proposal	<input checked="" type="checkbox"/> New <input type="checkbox"/> Already exists / review <input type="checkbox"/> Changing
Directorate: Resources	Lead Officer name: Niotia Ferguson
Service Area: Procurement & Contract Management	Lead Officer role: Head of Procurement & Contract Management

Step 1: What do we want to do?

The purpose of an Equality Impact Assessment is to assist decision makers in understanding the impact of proposals as part of their duties under the Equality Act 2010. Detailed guidance to support completion can be found here [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#).

This assessment should be started at the beginning of the process by someone with a good knowledge of the proposal and service area, and sufficient influence over the proposal. It is good practice to take a team approach to completing the equality impact assessment. Please contact the [Equality and Inclusion Team](#) early for advice and feedback.

1.1 What are the aims and objectives/purpose of this proposal?

Briefly explain the purpose of the proposal and why it is needed. Describe who it is aimed at and the intended aims / outcomes. Where known also summarise the key actions you plan to undertake. Please use plain English, avoiding jargon and acronyms. Equality Impact Assessments are viewed by a wide range of people including decision-makers and the wider public.

Budget context

Every year, the council must agree an annual budget which balances the money we spend with the money we are expecting to receive. Councils across the country are continuing to face financial challenges and based on our current forecasts, we face a funding gap over the next five years (to 2028/29) of up to £81.2 million dependent on the severity of factors such as inflation, funding changes, and unavoidable service pressures. This is in addition to the £17.7 million of savings and efficiencies proposals for 2024-2028 outlined in the 2023/24 budget and assumed delivery of 2023/24 savings in the current year.

The Council has defined statutory responsibilities, but deliver against a far broader agenda, providing universal services benefiting the whole community, and targeted services aimed at individuals, communities with particular needs, and businesses – administered by our workforce, city partners, stakeholder organisations and commissioned services.

To address these challenges we are looking across all of our services with a focus on:

- maximising our transformation programmes – where we are looking to improve services whilst achieving the best value for money
- income opportunities – where we are looking to improve our external income and most effectively apply that income
- targeted reviews – where we are looking at services that are comparatively high in cost compared to other councils to see where we can do things differently to reduce costs, be more efficient in how we do things and, in some cases, stop doing some things entirely.

This Proposal

Bristol City Council (BCC) requires compliantly procured contract to deliver Professional Services requirements across the authority.

Professional services

Professional services are provided by an individual or business to help us achieve a goal or run a project. They're provided by people who have specific knowledge and skills in that area of work to fulfil the responsibilities of particular roles. Individuals will be expected to show certification, registration or a license if they're providing a certain type of service.

Consultancy

Consultants:

- conduct research and collate data to identify issues with an organisation's process
- present their findings to the client
- provide recommendations and implement the changes
- prepare business proposals, manage projects and lead team members

The procured contract has been awarded to Constellia for 2 years expiring in April 2025. One of the terms of the contract award was a cashable benefit to BCC.

As part of their proposal Constellia offered a financial rebate payable to BCC on award of any contract they secure. The rate agreed is 2% of the awarded contract value.

Currently the Council spend is approx. £12 million a year of professional services. This work is often awarded in an inconsistent way without approaching the market to compete their requirements which does not evidence value for money or compliance with Procurement rules/regulations.

Contracts are currently awarded to the same repeated suppliers, reducing the opportunity for other suppliers to quote specifically local, diverse and MSME's (Micro, Small Medium Enterprises) to be awarded contracts. Often contracts are awarded without including Key Performance Indicators or proper Contract Management arrangements which is largely due to time and resource constraints.

The awarded contract will result in:

- Compliantly awarded contract via the SEWTAPS (South East Wales Technical and Professional Services) Framework
- Dedicated resource (extension of Procurement Team)
- No cost to Bristol City Council
- Compliance with BCC procurement rules and procurement regulations
- Increase and focus on awarding to Local and Diverse suppliers, specifically MSME, Voluntary and Social Enterprise
- Online platform to monitor contract delivery and social value

The awarded contract will ensure our spend is compliant but also that there is evidence of value for money and that the spend aligns to all Corporate priorities.

1.2 Who will the proposal have the potential to affect?

<input type="checkbox"/> Bristol City Council workforce	<input type="checkbox"/> Service users	<input checked="" type="checkbox"/> The wider community
<input checked="" type="checkbox"/> Commissioned services	<input type="checkbox"/> City partners / Stakeholder organisations	
Additional comments:		

1.3 Will the proposal have an equality impact?

<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	[please select]
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Could the proposal affect access levels of representation or participation in a service, or does it have the potential to change e.g. quality of life: health, education, or standard of living etc.?

If 'No' explain why you are sure there will be no equality impact, then skip steps 2-4 and request review by Equality and Inclusion Team.

If 'Yes' complete the rest of this assessment, or if you plan to complete the assessment at a later stage please state this clearly here and request review by the Equality and Inclusion Team.

Step 2: What information do we have?

2.1 What data or evidence is there which tells us who is, or could be affected?

Please use this section to demonstrate an understanding of who could be affected by the proposal. Include general population data where appropriate, and information about people who will be affected with particular reference to protected and other relevant characteristics: [How we measure equality and diversity \(bristol.gov.uk\)](https://www.bristol.gov.uk/equality-diversity)

Use one row for each evidence source and say which characteristic(s) it relates to. You can include a mix of qualitative and quantitative data e.g. from national or local research, available data or previous consultations and engagement activities.

Outline whether there is any over or under representation of equality groups within relevant services - don't forget to benchmark to the local population where appropriate. Links to available data and reports are here [Data, statistics and intelligence \(sharepoint.com\)](https://www.sharepoint.com/Data-Statistics-and-Intelligence). See also: [Bristol Open Data \(Quality of Life, Census etc.\)](#); [Joint Strategic Needs Assessment \(JSNA\)](#); [Ward Statistical Profiles](#).

For workforce / management of change proposals you will need to look at the diversity of the affected teams using available evidence such as [HR Analytics: Power BI Reports \(sharepoint.com\)](https://www.sharepoint.com/HR-Analytics-Power-BI-Reports) which shows the diversity profile of council teams and service areas. Identify any over or under-representation compared with Bristol economically active citizens for different characteristics. Additional sources of useful workforce evidence include the [Employee Staff Survey Report](#) and [Stress Risk Assessment Form](#)

Data / Evidence Source [Include a reference where known]	Summary of what this tells us
Census 2021	The Census details the demographic profile of Bristol.
The population of Bristol	Updated annually. The report brings together statistics on the current estimated population of Bristol, recent trends in population, future projections and looks at the key characteristics of the people living in Bristol.
Bristol Key Facts 2022	Population Profiles for Equalities Groups bring together detailed analysis looking at equalities groups and how they differ in relation to age, health, employment, education and housing, and maps the distribution of equalities groups across the city.

<p><u>An evaluation of the Bristol Race Equality Covid-19 Steering Group</u></p> <p><u>Designing a new social reality - Research on the impact of covid-19 on Bristol's VCSE sector and what the future should be – Black South West Network 2020</u></p> <p><u>Delivering an inclusive economy post COVID-19</u></p>	<p>Report focusing on how co-production using a One City approach has been used to respond to the disproportionate impact of the Covid-19 pandemic on our marginalized ethnic communities.</p> <p>Local research has highlighted how long-term underinvestment and lack of equity in funding and procurement has eroded the local Voluntary and community sector.</p> <p>Our local partners have conducted research into the ongoing impact of COVID-19 for women and have provided recommendations on what service providers can do to reduce impact further impact.</p>
<p>SPARNET - Percentage of procurement spend with 'Micro, Small and Medium sized Enterprises' (MSME's)</p>	<p>This measures the percentage of Bristol City Council's overall procurement expenditure committed to Micro, small and medium sized enterprises. (MSMEs). The aim is to support BCCs policy to ensure that SMEs have the opportunity to bid for and win council contracts. BCC's annual target is 40% currently we are reporting as 51.9% which is significantly higher than target.</p>

2.2 Do you currently monitor relevant activity by the following protected characteristics?

<input type="checkbox"/> Age	<input type="checkbox"/> Disability	<input type="checkbox"/> Gender Reassignment
<input type="checkbox"/> Marriage and Civil Partnership	<input type="checkbox"/> Pregnancy/Maternity	<input type="checkbox"/> Race
<input type="checkbox"/> Religion or Belief	<input type="checkbox"/> Sex	<input type="checkbox"/> Sexual Orientation

2.3 Are there any gaps in the evidence base?

Where there are gaps in the evidence, or you don't have enough information about some equality groups, include an equality action to find out in section 4.2 below. This doesn't mean that you can't complete the assessment without the information, but you need to follow up the action and if necessary, review the assessment later. If you are unable to fill in the gaps, then state this clearly with a justification.

For workforce related proposals all relevant characteristics may not be included in HR diversity reporting (e.g. pregnancy/maternity). For smaller teams diversity data may be redacted. A high proportion of not known/not disclosed may require an action to address under-reporting.

Although our corporate approach is to collect diversity monitoring for all relevant characteristics, there are gaps in the available local diversity data for some characteristics, especially where this has not always historically been included in census and statutory reporting e.g. for sexual orientation.

We also know there are some under-reporting gaps in our workforce diversity information - where personal and confidential information is voluntarily requested from staff.

We do not currently record:

- If a supplier is a diverse supplier
- How many Diverse suppliers we contract with

The questions we will be asking bidders are (for information only):

Would you define your company/organisation/charity etc as a diverse supplier?

Definition – (please tick which definition applies to your company/organisation/charity):

- I confirm that I am from a Black, Asian or other minority ethnic background OR our directorship is at least 51% Black, Asian or minority ethnic.
- I confirm that 51% of trustees and governing members are from Black, Asian or minority ethnic

Additional:

- Are you majority-led by Black and minoritized communities (75% Trustees and/or 50% senior staff)?

We are currently working on changing questions asked in our e-tendering portal to capture this data from suppliers.

In order to track the delivery of this proposal and impact on the local community and supply chain this will need to be implemented.

2.4 How have you involved communities and groups that could be affected?

You will nearly always need to involve and consult with internal and external stakeholders during your assessment. The extent of the engagement will depend on the nature of the proposal or change. This should usually include individuals and groups representing different relevant protected characteristics. Please include details of any completed engagement and consultation and how representative this had been of Bristol's diverse communities.

Include the main findings of any engagement and consultation in Section 2.1 above.

If you are managing a workforce change process or restructure please refer to [Managing change or restructure \(sharepoint.com\)](#) for advice on consulting with employees etc. Relevant stakeholders for engagement about workforce changes may include e.g. staff-led groups and trades unions as well as affected staff.

We launched a public consultation on our budget proposals between 09th November 2023 to the 21st December 2023. This consultation set out all the savings proposals we had identified to produce a balanced budget in the context of reduced available funding and increasing financial pressures.

2.5 How will engagement with stakeholders continue?

Explain how you will continue to engage with stakeholders throughout the course of planning and delivery. Please describe where more engagement and consultation is required and set out how you intend to undertake it. Include any targeted work to seek the views of under-represented groups. If you do not intend to undertake it, please set out your justification. You can ask the Equality and Inclusion Team for help in targeting particular groups.

All responses to the Budget Consultation will be analysed and included in the Council's Budget report that will be published on the Bristol City Council website in early 2023. We will take Budget consultation responses into account when developing this and other final proposals to put to the Cabinet and a meeting of the Full Council for approval. The final decision will be taken by Full Council at its budget setting meeting in February / March 2024.

Following the setting of the overall budget envelope We meet quarterly with a local community group of suppliers via the Black South West Network as part of our commitment to make Procurement & Contract Management more accessible.

Full consultation and scrutiny was completed on the Procurement & Contract Management Strategy with input from .

Procurement Engagement workshops will continue to be held quarterly which is held and advertised externally via Black South West Network.

Supplier engagement days are scheduled jointly with Constellia to bring awareness to the contract and help local suppliers register so they can be included in any requests for quotes. This will be advertised via BCC Website, social Media, Federation of Small Businesses and Chamber of Commerce.

This will help to ensure that our services and actions are informed by the views and needs of all our citizens.

Step 3: Who might the proposal impact?

Analysis of impacts must be rigorous. Please demonstrate your analysis of any impacts of the proposal in this section, referring to evidence you have gathered above, and the characteristics protected by the Equality Act 2010. Also include details of existing issues for particular groups that you are aware of and are seeking to address or mitigate through this proposal. See detailed guidance documents for advice on identifying potential impacts etc. [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#)

3.1 Does the proposal have any potentially adverse impacts on people based on their protected or other relevant characteristics?

Consider sub-categories (different kinds of disability, ethnic background etc.) and how people with combined characteristics (e.g. young women) might have particular needs or experience particular kinds of disadvantage.

Where mitigations indicate a follow-on action, include this in the 'Action Plan' Section 4.2 below.

GENERAL COMMENTS (highlight any potential issues that might impact all or many groups)

Even when we plan to consult in more detail on specific service delivery proposals at a later time, we must ensure that any budget setting decisions that are likely to affect future services are informed by sufficient consultation and proper analysis. This is so that decision makers can have due regard to any likely disproportionate or negative impact on the basis of their protected and other relevant characteristics at the time the budget is approved – not afterwards¹.

Decision makers will have the ability to make changes to the individual spending plans following further consultation as appropriate and detailed evaluation of the impact of specific proposals. Within the proposed budget envelope there will be financial mitigation put aside for any non-delivery or amendments to proposals which may occur due to future consideration of equalities issues or other factors.

As well as identifying whether budget changes will have a disproportionate impact on particular groups (e.g., because they are over-represented in a particular cohort), we need to pay particular attention to the risk of indirect discrimination: when an apparently neutral decision puts members of a given group at a particular disadvantage compared with other people because of their different needs and circumstances.

We are also aware of existing structural inequalities and particular considerations, issues, and disparities for people in Bristol based on their characteristics, which we will take into account.

Whilst there is no direct impact on people with protected characteristics – there is an impact on the Bristol Local Community and supply chain. The contract has a clear commitment to supporting local workforce and awarding more contracts to local suppliers. As shown above in the Census data we have a diverse population of 18.9% who could all be positively affected by us awarding more contracts locally and to diverse suppliers.

To determine a 'diverse supplier' we ask: *"Would you define your company/organisation/charity etc as a diverse supplier?"*

Definition – (please tick which definition applies to your company/organisation/charity):

- I confirm that I am from a Black, Asian or other minority ethnic background OR our directorship is at least 51% Black, Asian or minority ethnic.
- I confirm that 51% of trustees and governing members are from Black, Asian or minority ethnic
- Are you majority-led by Black and minoritized communities (75% Trustees and/or 50% senior staff)?", hence the considerations made below.

Age: Young People	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	•
Mitigations:	See general comments above
Age: Older People	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	•
Mitigations:	See general comments above
Disability	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	•
Mitigations:	See general comments above
Sex	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	•
Mitigations:	See general comments above
Sexual orientation	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	•
Mitigations:	See general comments above
Pregnancy / Maternity	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	•
Mitigations:	See general comments above
Gender reassignment	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	•
Mitigations:	See general comments above
Race	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • Ethnic minorities in Bristol experience greater disadvantage than in England and Wales as a whole in education and employment and this is particularly so for Black African people². • In the last census (2011) 16% of the population belonged to a Black, Asian or minority ethnic group and this is likely to be higher now. • The top three countries of birth outside UK for Bristol residents are Poland, Somalia and India. • Although the race or ethnicity pay gap has narrowed in recent years there are still wide pay differences between particular ethnic groups and most minority ethnic groups earn less on average than White British people. • Bangladeshi, Pakistani, and Black ethnic groups are more likely to live in deprived neighbourhoods; and the same groups and Chinese ethnicities are about twice as likely to live on a low income and experience child poverty compared to White groups • Black, Asian and minoritised ethnic households are less likely to own their home and more likely to living in overcrowded housing and intergenerational households. Bangladeshi and Pakistani groups are more likely to live in multi-family households. • Black people in the UK are less likely to hold a driving licence and more likely to rely on public transport. • Black, Asian and minority ethnic groups in Bristol are more likely to find inaccessible public transport prevents them from leaving their home when they want to • Black African young people are disadvantaged in education compared to their White peers⁸. A disproportionately high percentage of Bristol school pupils from Black, Asian and minority ethnic backgrounds are excluded from school and In Bristol pupils with the lowest 'Attainment 8' scores are from Black ethnic background (highest from Chinese ethnic background.) • Organisations may lack cultural competence because minoritised ethnic staff are under- represented.

	<ul style="list-style-type: none"> • People from Black African, Other, and Black Caribbean groups have persistently high levels of unemployment and almost all ethnic minority groups in Bristol experience employment inequality when compared to White British people. • Black Asian and other minoritised ethnic groups are more likely to be self-employed than the Bristol average and over-represented in low income self-employment including taxis, takeaway restaurants • People from minoritised ethnic backgrounds are underrepresented in political and civic leadership. • People who do not speak English as a main language may require information in plain English and community language translations or videos etc.
Mitigations:	Hence the focus on increasing suppliers from Black, Asian and Minoritised communities
Religion or Belief	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	•
Mitigations:	See general comments above
Marriage & civil partnership	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	
Mitigations:	
OTHER RELEVANT CHARACTERISTICS	
Socio-Economic (deprivation)	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • Bristol has 41 areas in the most deprived 10% in England, including 3 in the most deprived 1%. The greatest levels of deprivation are in Hartcliffe & Withywood, Filwood and Lawrence Hill. • In Bristol 15% of residents - 70,800 people - live in the 10% most deprived areas in England, including 19,000 children and 7,800 older people. • There are an estimated 29,045 households living in fuel poverty in Bristol, 14.4% of all households (BEIS, 2022) • 4.6% of households have experienced moderate to severe food insecurity, rising to 11.2% in the most deprived areas of the city (QoL 2021-22) • 34.6% of people in Bristol are dissatisfied with the way the Council runs things, but this is 47.5% for people living in the most deprived areas of the city (QoL 2021-22). • The inequalities gap in life expectancy between the most and least deprived areas in Bristol is 9.9 years for men and 6.7 years for women.
Mitigations:	See general comments above
Carers	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	•
Mitigations:	See general comments above
Other groups [Please add additional rows below to detail the impact for other relevant groups as appropriate e.g. Asylums and Refugees; Looked after Children / Care Leavers; Homelessness]	
Potential impacts:	
Mitigations:	

3.2 Does the proposal create any benefits for people based on their protected or other relevant characteristics?

Outline any potential benefits of the proposal and how they can be maximised. Identify how the proposal will support our [Public Sector Equality Duty](#) to:

- ✓ Eliminate unlawful discrimination for a protected group
- ✓ Advance equality of opportunity between people who share a protected characteristic and those who don't
- ✓ Foster good relations between people who share a protected characteristic and those who don't

The scale of the potential gap in our core funding means that there is very limited opportunity to bring genuine additional benefit to equalities groups in the circumstances. However, we have considered as far as possible the need to: eliminate discrimination, harassment, victimisation and any other conduct prohibited under the Equality Act 2010; advance equality of opportunity between people from different groups; and foster good relations between people from different groups.

Our budget savings proposals are aligned to our Corporate Strategy and although we have limited resources our future focus will be on achieving those priorities, we have identified including tackling poverty and intergenerational inequality.

Step 4: Impact

4.1 How has the equality impact assessment informed or changed the proposal?

What are the main conclusions of this assessment? Use this section to provide an overview of your findings. This summary can be included in decision pathway reports etc.

If you have identified any significant negative impacts which cannot be mitigated, provide a justification showing how the proposal is proportionate, necessary, and appropriate despite this.

Summary of significant negative impacts and how they can be mitigated or justified:

None

Summary of positive impacts / opportunities to promote the Public Sector Equality Duty:

- Employment: we believe that local people being in high quality employment can transform the lives of individuals, families and communities.
- Local suppliers: we believe we have highly skilled and competitive suppliers in Bristol, and so trying to use them where possible helps these organisations to grow, develop and create more local employment.
- involve community stakeholders, voluntary and community sector organisations and other interested parties when we consult on what service is needed and how it should be delivered.
- Engagement with suppliers and representative groups to help local suppliers understand our procurement processes, decide if public sector contracts are right for them, if they are ready to tender and how they can submit the best possible bids
- Supplier diversity: we believe it's important that the suppliers who deliver services to Bristol support our equality and diversity aims and reflect our city.
- Partnerships: we believe that as part of our One City Approach, we can only achieve our goals for Bristol by working even more closely with a wide range of private, public and voluntary organisations.

4.2 Action Plan

Use this section to set out any actions you have identified to improve data, mitigate issues, or maximise opportunities etc. If an action is to meet the needs of a particular protected group please specify this.

Improvement / action required	Responsible Officer	Timescale
All relevant EqlAs will be published on the Council's website https://www.bristol.gov.uk/council-spending-performance/council-budgets and continue to be updated as appropriate.		

4.3 How will the impact of your proposal and actions be measured?

How will you know if you have been successful? Once the activity has been implemented this equality impact assessment should be periodically reviewed to make sure your changes have been effective your approach is still appropriate.

Our Equality and Inclusion Annual Progress Reports show what we have done to achieve the aims of our Equality and Inclusion policy and strategy, and the progress we have made including reporting on all relevant KPIs and workforce diversity [Equalities policy - bristol.gov.uk](https://www.bristol.gov.uk/equality-and-inclusion-policy)
[The Procurement And Contract Strategy 2023-2027 action plan will monitor and report progress regularly.](#)

The Equality and Inclusion Team need at least five working days to comment and feedback on your EqIA. EqIAs should only be marked as reviewed when they provide sufficient information for decision-makers on the equalities impact of the proposal. Please seek feedback and review from the [Equality and Inclusion Team](#) before requesting sign off from your Director¹.

Equality and Inclusion Team Review: <i>Reviewed by Equality and Inclusion Team</i>	Director Sign-Off: Denise Murray
Date: 14/12/2023	08/01/2024

¹ Review by the Equality and Inclusion Team confirms there is sufficient analysis for decision makers to consider the likely equality impacts at this stage. This is not an endorsement or approval of the proposal.

Equality Impact Assessment [version 2.10]



Title: GAP048 Increase Direct Lets with Private Sector Landlords for Temporary Accommodation	
<input checked="" type="checkbox"/> Budget Proposal	<input type="checkbox"/> New <input checked="" type="checkbox"/> Already exists / review <input type="checkbox"/> Changing
Directorate: Growth and Regeneration	Lead Officer name: Paul Sylvester
Service Area: Housing and Landlords	Lead Officer role: Head of Housing Options

Step 1: What do we want to do?

The purpose of an Equality Impact Assessment is to assist decision makers in understanding the impact of proposals as part of their duties under the Equality Act 2010. Detailed guidance to support completion can be found here [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#).

This assessment should be started at the beginning of the process by someone with a good knowledge of the proposal and service area, and sufficient influence over the proposal. It is good practice to take a team approach to completing the equality impact assessment. Please contact the [Equality and Inclusion Team](#) early for advice and feedback.

1.1 What are the aims and objectives/purpose of this proposal?

Briefly explain the purpose of the proposal and why it is needed. Describe who it is aimed at and the intended aims / outcomes. Where known also summarise the key actions you plan to undertake. Please use [plain English](#), avoiding jargon and acronyms. Equality Impact Assessments are viewed by a wide range of people including decision-makers and the wider public.

Budget context

Every year, the council must agree an annual budget which balances the money we spend with the money we are expecting to receive. Councils across the country are continuing to face financial challenges and based on our current forecasts, we face a funding gap over the next five years (to 2028/29) of up to £81.2 million dependent on the severity of factors such as inflation, funding changes, and unavoidable service pressures. This is in addition to the £17.7 million of savings and efficiencies proposals for 2024-2028 outlined in the 2023/24 budget and assumed delivery of 2023/24 savings in the current year.

The Council has defined statutory responsibilities, but deliver against a far broader agenda, providing universal services benefiting the whole community, and targeted services aimed at individuals, communities with particular needs, and businesses – administered by our workforce, city partners, stakeholder organisations and commissioned services.

To address these challenges, we are looking across all of our services with a focus on:

- maximising our transformation programmes – where we are looking to improve services whilst achieving the best value for money
- income opportunities – where we are looking to improve our external income and most effectively apply that income
- targeted reviews – where we are looking at services that are comparatively high in cost compared to other councils to see where we can do things differently to reduce costs, be more efficient in how we do things and, in some cases, stop doing some things entirely.

This proposal

The council has a statutory duty to provide accommodation to people who are homeless, and either reach our vulnerability thresholds or have dependent children, and where it hasn't been possible to prevent homelessness.

We would reduce our reliance on our most expensive privately managed Temporary Accommodation, by renting properties direct from landlords. Temporary accommodation can mean staying in a hostel or a private rented room.

This would reduce costs associated with providing Temporary Accommodation by bringing in third party capacity to support with resource for BCC to directly let from landlords, rather than via an accommodation framework which can be costly.

This work already happens within the service, and is now part of how we meet our temporary accommodation needs. We are using existing TA Project Budget to increase capacity to work with more landlords to provide more of this type of accommodation. Quality assurance of temporary accommodation will continue as normal with regular inspections of properties. BCC will work with landlords to ensure accommodation is suitable. BCC takes a person-centred approach when working with service-users to assess needs and allocates based on need where possible. When we ask for landlords to provide their properties for use as Temporary Accommodation, we will seek to target the areas where we have limited supply, in order to meet the specific needs of different groups.

The proposal is anticipated to have a positive equalities impact by increasing the amount of accommodation available for service users. Currently, due to a lack of available accommodation, this may not be in a neighbourhood which is familiar to service-users. Increasing the amount of accommodation would allow for more choice and would increase chances of service-users being in a neighbourhood that may be more familiar and suitable to their individual needs.

1.2 Who will the proposal have the potential to affect?

<input type="checkbox"/> Bristol City Council workforce	<input checked="" type="checkbox"/> Service users	<input type="checkbox"/> The wider community
<input type="checkbox"/> Commissioned services	<input type="checkbox"/> City partners / Stakeholder organisations	
Additional comments:		

1.3 Will the proposal have an equality impact?

<input type="checkbox"/> Yes	<input type="checkbox"/> No
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Could the proposal affect access levels of representation or participation in a service, or does it have the potential to change e.g. quality of life: health, education, or standard of living etc.?

If 'No' explain why you are sure there will be no equality impact, then skip steps 2-4 and request review by Equality and Inclusion Team.

If 'Yes' complete the rest of this assessment, or if you plan to complete the assessment at a later stage please state this clearly here and request review by the Equality and Inclusion Team.

Step 2: What information do we have?

2.1 What data or evidence is there which tells us who is, or could be affected?

Please use this section to demonstrate an understanding of who could be affected by the proposal. Include general population data where appropriate, and information about people who will be affected with particular reference to protected and other relevant characteristics: [How we measure equality and diversity \(bristol.gov.uk\)](https://www.bristol.gov.uk/equality-diversity)

Use one row for each evidence source and say which characteristic(s) it relates to. You can include a mix of qualitative and quantitative data e.g. from national or local research, available data or previous consultations and engagement activities.

Outline whether there is any over or under representation of equality groups within relevant services - don't forget to benchmark to the local population where appropriate. Links to available data and reports are here [Data, statistics and intelligence \(sharepoint.com\)](https://www.bristol.gov.uk/data-statistics-intelligence). See also: [Bristol Open Data \(Quality of Life, Census etc.\)](#); [Joint Strategic Needs Assessment \(JSNA\)](#); [Ward Statistical Profiles](#).

For workforce / management of change proposals you will need to look at the diversity of the affected teams using available evidence such as [HR Analytics: Power BI Reports \(sharepoint.com\)](#) which shows the diversity profile of council teams and service areas. Identify any over or under-representation compared with Bristol economically active citizens for different characteristics. Additional sources of useful workforce evidence include the [Employee Staff Survey Report](#) and [Stress Risk Assessment Form](#)

Data / Evidence Source [Include a reference where known]	Summary of what this tells us
Census 2021	The Census details the demographic profile of Bristol.
The population of Bristol Bristol Key Facts 2022	<p>Updated annually. The report brings together statistics on the current estimated population of Bristol, recent trends in population, future projections and looks at the key characteristics of the people living in Bristol.</p> <p>Population Profiles for Equalities Groups bring together detailed analysis looking at equalities groups and how they differ in relation to age, health, employment, education and housing, and maps the distribution of equalities groups across the city.</p> <p>The population of Bristol has become increasingly diverse and some local communities have changed significantly. There are now at least 45 religions, at least 187 countries of birth and at least 91 main languages spoken.</p> <p>Bristol has a relatively young age profile with more children aged 0-15 than people aged 65 and over.</p> <p>Bristol has 41 areas in the most deprived 10% in England, including 3 in the most deprived 1% (Hartcliffe, Withywood and Lawrence Hill)</p>

Ward profile data (bristol.gov.uk)

The Ward Profiles provide a range of data-sets, including population, life expectancy, health and education disparities etc. for each of Bristol's electoral wards.

Bristol Quality of Life Survey 2021-22

The Quality of Life (QoL) survey is an annual randomised sample survey of the Bristol population, mailed to 33,000 households (with online & paper options), and some additional targeting to boost numbers from low responding groups. In brief, the most recent QoL survey indicated that inequality and deprivation continue to affect people's experience in almost every element measured by the survey.

The Quality of Life 2021/22 data dashboard highlights those indicators, wards and equality and demographic groups which are better or worse than the Bristol average.

For example there are significant disparities based on people's characteristics and circumstances in the extent to which they find it difficult to manage financially:

Quality of Life Indicator	% who find it difficult to manage financially
16 to 24 years	12.5
50 years and older	6.7
65 years and older	3.2
Female	8.6
Male	8.5
Disabled	21.6
Asian /Asian British	9.9
Black/Black British	19.8
Mixed/Multiple Ethnicity	16.3
White British	7.8
White Minority Ethnic	8.4
Lesbian Gay or Bisexual	12.7
No Religion or Faith	8.0
Christian Religion	8.3
Other Religions	18.2
Carer	10.7
Full Time Carer	14.0
Part Time Carer	9.7
Single Parent	28.6
Two Parent	9.6
Parent (all)	12.0
No Qualifications	10.0
Non-Degree Qualified	12.9
Degree Qualified	6.7

	<table border="1"> <tr> <td>Rented (Council)</td> <td>20.3</td> </tr> <tr> <td>Rented (HA)</td> <td>20.6</td> </tr> <tr> <td>Rented (Private)</td> <td>14.6</td> </tr> <tr> <td>Owner Occupier</td> <td>4.6</td> </tr> <tr> <td>Most Deprived 10%</td> <td>18.8</td> </tr> <tr> <td>Bristol Average</td> <td>8.7</td> </tr> </table>	Rented (Council)	20.3	Rented (HA)	20.6	Rented (Private)	14.6	Owner Occupier	4.6	Most Deprived 10%	18.8	Bristol Average	8.7
Rented (Council)	20.3												
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Rented (Private)	14.6												
Owner Occupier	4.6												
Most Deprived 10%	18.8												
Bristol Average	8.7												
<p><u>Joint Strategic Needs Assessment (JSNA)</u></p>	<p>The Joint Strategic Needs Assessment reports on the health and wellbeing needs of the people of Bristol. It brings together detailed information on local health and wellbeing needs and looks ahead at emerging challenges and projected future needs. The JSNA is used to provide a comprehensive picture of the health and wellbeing needs of Bristol (now and in the future); to inform decisions about how we design, commission and deliver services, and also about how the urban environment is planned and managed; to improve and protect health and wellbeing outcomes across the city while reducing health inequalities; and to provide partner organisations with information on the changing health and wellbeing needs of Bristol, at a local level, to support better service delivery.</p>												
<p><u>Bristol One City: Cost of Living Crisis – Bristol’s One City approach to supporting citizens and communities (Oct 2022)</u></p>	<p>The rising cost of living is not impacting on everyone equally. People who are already experiencing inequity and poverty will be disproportionately impacted:</p> <ul style="list-style-type: none"> • People on the lowest incomes - will have less available income but also pay more for the same services. For example, people unable to pay their bills by Direct Debit and those borrowing money are subject to higher costs and interest rates. This is what anti-poverty campaign group Fair by Design has referred to as a Poverty Premium • Households with pre-payment energy meters - households with pre-payment meters often pay above-average costs for their fuel. They will face a significant rise in their monthly bills in autumn and winter with increased energy usage as they do not benefit from the “smoothing” effect of Direct Debits, which spread usage costs evenly across the year • Parents and young families – parents of young children are more likely to seek credit and alternative support as they are less able, on average, to afford an unexpected expense. Single parents will be disproportionately affected; and one in four single parents find it difficult to manage financially (28.6%). • Disabled people – just under half of all people in poverty in the UK are Disabled people or someone living with a Disabled person. Disabled people have higher living costs, and tend to pay more for their heating, travel, food/diet, prescription payments, and specialist equipment. It is estimated that UK 												

households that include Disabled children pay on average £600 more for their energy bills than an average household

- **Black and Minoritised people** – A higher proportion of Black and minoritised ethnic groups reported finding it difficult to manage financially (14.9%) in 2021. In 2020 the Social Metrics Commission found that almost half of people living in a family in the UK where the head of the household is Black are in poverty. Age UK report that poverty among older Black and minoritised ethnic groups is twice as high as for white pensioners
- **People in rented accommodation** – it is estimated that 69% of low-income private renters in England will be forced to go without food and heating at least one day per week to meet rising housing and living cost. Almost three in ten homes in Bristol are privately rented
- **Underserved populations** - It is likely that populations that are not typically well represented in data and research are likely to also face increased risk from rising cost of living. For example, refugees and asylum seekers, people experiencing homelessness, and Gypsy/Roma/Traveller groups.

An evaluation of the Bristol Race Equality Covid-19 Steering Group

Designing a new social reality - Research on the impact of covid-19 on Bristol’s VCSE sector and what the future should be – Black South West Network 2020

Delivering an inclusive economy post COVID-19

Housing Register Data diversity monitoring *(all households who have applied for social housing in Bristol)*

Under 18	0.2%
18-25	11.6%
26-35	29.7%
36-45	26.2%
46-55	15.8%
56-65	10.1%
66-75	4.2%
Over 75	2.3%
Female	58.3%
Male	41.5%
Prefer not to say	0.3%
Asian or Asian British	5.4%
Black or Black British	16.3%
Mixed / multiple ethnicity	5.5%
White British	60.0%
White Other	8.1%
Other Ethnic Background	2.4%
Disabled person	44.2%
LGBQ+	6.4%
Christian	25.5%

	Other faith group	18.5%	
	No religion	37.8%	
	Trans	0.4%	
	Pregnant	1.8%	
Abritas	Case specific database for citywide Homelessness Prevention Service to capture those assessed under the Homelessness Reduction Act - linked to gov.uk HCLIC Homelessness statistics - GOV.UK (www.gov.uk)		
Joint Strategic Needs Assessment	Citywide quarterly data, population, housing, health		
National Statistics (Department of Levelling up Housing and Communities)	National Homelessness Data from quarterly returns by local government through H-CLIC returns		
Rough Sleeping Snapshot	Citywide monthly and annual street count reported to gov.uk		
Population -Bristol Key Facts 2021 (March 2021 Update)	The population of Bristol is estimated to be 465,900 and is expected to increase over the 25-year period (2018-43) to 532,700. This is a 15% increase and is higher than the 10% increase forecast for England. The proportion of the population who are not 'White British' has increased from 12% to 22% of the total population.		
Housing -Bristol Key Facts 2023(November 2023 Update) Bristol Key Facts November 2023	There are 205,270 homes in Bristol, and the average house price £330,000 against an England average of £268,000. Bristol earnings are similar to the national average (£34,215 compared with £33,111) resulting in affordability issues. The high cost of housing drives higher rents, meaning that housing outside of the social rented sector is becoming increasingly unaffordable. Bristol's tenure mix is 55% Owner Occupied, 26% Private Rented and 19% Social Rented		
Housing Register data [Internal use only]	Over representation of Black and minoritised ethnic people – 37.7% of households on the Housing register Over representation of Disabled people – 44.2% of households on the Housing Register identify as having a disability or long-term health condition		

2.2 Do you currently monitor relevant activity by the following protected characteristics?

<input checked="" type="checkbox"/> Age	<input checked="" type="checkbox"/> Disability	<input checked="" type="checkbox"/> Gender Reassignment
<input checked="" type="checkbox"/> Marriage and Civil Partnership	<input checked="" type="checkbox"/> Pregnancy/Maternity	<input checked="" type="checkbox"/> Race
<input checked="" type="checkbox"/> Religion or Belief	<input checked="" type="checkbox"/> Sex	<input checked="" type="checkbox"/> Sexual Orientation

2.3 Are there any gaps in the evidence base?

Where there are gaps in the evidence, or you don't have enough information about some equality groups, include an equality action to find out in section 4.2 below. This doesn't mean that you can't complete the assessment without the information, but you need to follow up the action and if necessary, review the assessment later. If you are unable to fill in the gaps, then state this clearly with a justification.

For workforce related proposals all relevant characteristics may not be included in HR diversity reporting (e.g. pregnancy/maternity). For smaller teams diversity data may be redacted. A high proportion of not known/not disclosed may require an action to address under-reporting.

Although our corporate approach is to collect diversity monitoring for all relevant characteristics, there are gaps in the available local diversity data for some characteristics, especially where this has not always historically been included in census and statutory reporting e.g. for sexual orientation. We also know there are some under-reporting gaps in our workforce diversity information - where personal and confidential information is voluntarily requested from staff.

Data collected for the homelessness review in 2017 indicated that there were gaps in existing ethnicity data, with ethnicity not always stated or recorded. The recording of data has improved, and the data shows that Black, Asian and minority ethnic homelessness applicants are over-represented compared to their relative proportion in the Bristol Community as a whole.

We also know that there are gaps in our data relating to sexual orientation with 13.4% of households on the Housing Register preferring not to say.

In general, we acknowledge that there are gaps in our knowledge about the future demands on homelessness services as it affects a range of equalities groups and will be looking to improve the range of equalities data we gather, both as a local authority and through the homelessness services we commission.

2.4 How have you involved communities and groups that could be affected?

You will nearly always need to involve and consult with internal and external stakeholders during your assessment. The extent of the engagement will depend on the nature of the proposal or change. This should usually include individuals and groups representing different relevant protected characteristics. Please include details of any completed engagement and consultation and how representative this had been of Bristol's diverse communities.

Include the main findings of any engagement and consultation in Section 2.1 above.

If you are managing a workforce change process or restructure please refer to [Managing change or restructure \(sharepoint.com\)](#) for advice on consulting with employees etc. Relevant stakeholders for engagement about workforce changes may include e.g. staff-led groups and trades unions as well as affected staff.

We launched a public consultation on our budget proposals between 09th November 2023 to the 21st of December 2023. This consultation set out all the savings proposals we had identified to produce a balanced budget in the context of reduced available funding and increasing financial pressures.

2.5 How will engagement with stakeholders continue?

Explain how you will continue to engage with stakeholders throughout the course of planning and delivery. Please describe where more engagement and consultation is required and set out how you intend to undertake it. Include any targeted work to seek the views of under-represented groups. If you do not intend to undertake it, please set out your justification. You can ask the Equality and Inclusion Team for help in targeting particular groups.

All responses to the Budget Consultation will be analysed and included in the Council's Budget report that will be published on the Bristol City Council website in early 2023. We will take Budget consultation responses into account when developing this and other final proposals to put to the Cabinet and a meeting of the Full Council for approval. The final decision will be taken by Full Council at its budget setting meeting in February / March 2024.

Following the setting of the overall budget envelope there will be extensive engagement, consultation and co-design with affected communities on particular proposals which will inform future decision making prior to implementation. Our approach to public engagement and consultation will proactively target under-represented respondents to increase the participation of people from equality groups and their local representative organisations. This will help to ensure that our services and actions are informed by the views and needs of all our citizens.

Step 3: Who might the proposal impact?

Analysis of impacts must be rigorous. Please demonstrate your analysis of any impacts of the proposal in this section, referring to evidence you have gathered above, and the characteristics protected by the Equality Act 2010. Also include details of existing issues for particular groups that you are aware of and are seeking to address or mitigate through this proposal. See detailed guidance documents for advice on identifying potential impacts etc. [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#)

3.1 Does the proposal have any potentially adverse impacts on people based on their protected or other relevant characteristics?

Consider sub-categories (different kinds of disability, ethnic background etc.) and how people with combined characteristics (e.g. young women) might have particular needs or experience particular kinds of disadvantage.

Where mitigations indicate a follow-on action, include this in the 'Action Plan' Section 4.2 below.

GENERAL COMMENTS (highlight any potential issues that might impact all or many groups)	
<p>Even when we plan to consult in more detail on specific service delivery proposals at a later time, we must ensure that any budget setting decisions that are likely to affect future services are informed by sufficient consultation and proper analysis. This is so that decision makers can have due regard to any likely disproportionate or negative impact on the basis of their protected and other relevant characteristics at the time the budget is approved – not afterwards¹.</p> <p>Decision makers will have the ability to make changes to the individual spending plans following further consultation as appropriate and detailed evaluation of the impact of specific proposals. Within the proposed budget envelope there will be financial mitigation put aside for any non-delivery or amendments to proposals which may occur due to future consideration of equalities issues or other factors.</p> <p>As well as identifying whether budget changes will have a disproportionate impact on particular groups (e.g., because they are over-represented in a particular cohort), we need to pay particular attention to the risk of indirect discrimination: when an apparently neutral decision puts members of a given group at a particular disadvantage compared with other people because of their different needs and circumstances.</p> <p>We are also aware of existing structural inequalities and particular considerations, issues, and disparities for people in Bristol based on their characteristics, which we will take into account.</p>	
PROTECTED CHARACTERISTICS	
Age: Young People	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • Single households and younger people overrepresented in Bristol homelessness (linked to mortality rates) • Young people are often under-represented in engagement and consultation in Bristol and are less satisfied than average with the way the council runs things. • Children and young people from the most deprived areas of Bristol have the poorest outcomes in health and education in terms of health, education and future employment etc. • Young people in Bristol are more likely to: <ul style="list-style-type: none"> ○ have poor emotional health and wellbeing ○ find inaccessible public transport prevents them from leaving their home when they want to

	<ul style="list-style-type: none"> ○ 6.8% of 16–17-year-olds (2020/21) were “not in education, employment or training” (NEET), worse than the national average (5.5%) • Young adults are most likely to have lost work or seen their income drop because of COVID-19 and the cost-of-living crisis
Mitigations:	Bristol City Council aims to take a person-centred approach to supporting service users in temporary accommodation, and we always seek to consider the needs of the families or individuals when matching them to Temporary Accommodation placements, subject to availability of suitable accommodation
Age: Older People	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • Older people in Bristol are: <ul style="list-style-type: none"> ○ less likely to be comfortable using digital services ○ more reliant on public and community transport ○ more likely to be an unpaid carer ○ more likely to help out or volunteer in their community ○ less likely to have formal qualifications • Bristol Ageing Better estimated at least 11,000 older people are experiencing isolation in the city. • We must factor aging and the needs of older people into long term budgeting and service design
Mitigations:	Bristol City Council aims to take a person-centred approach to supporting service users in temporary accommodation, and we always seek to consider the needs of the families or individuals when matching them to Temporary Accommodation placements, subject to availability of suitable accommodation
Disability	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • 17% of Bristol’s population are disabled. There are more disabled women than men living in Bristol. • A higher proportion of disabled people rent from a social provider (local authority or housing association) • Disabled people experience higher rates of hate crime and domestic abuse compared to the general population • Disabled people should be empowered to make independent living choices and have a say in access to service provision. • Budget setting needs to provide sufficient resource and flexibility to meet our legal duty to make anticipatory and responsive reasonable adjustments for disabled people including: <ul style="list-style-type: none"> ○ changing the way things are done e.g. opening / working times; ○ changes to overcome barriers created by the physical features of premises. ○ providing auxiliary aids e.g. extra equipment or a different or additional service. ○ is ‘anticipatory’ so we must think in advance and ongoing about what disabled people might reasonably need. • Disabled people must not be charged for their reasonable adjustments, accessible formats or other adaptations. It is a legal requirement under the Equalities Act to ensure information is accessible to disabled employees and service users.
Mitigations:	Bristol City Council aims to take a person-centred approach to supporting service users in temporary accommodation, and we always seek to consider the needs of the families or individuals when matching them to Temporary Accommodation

	placements, subject to availability of suitable accommodation including any adjustments based on Disability status.
Sex	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • 58.3% of all applicants for social housing in Bristol are female • In recent years there has been higher levels of women in local homelessness presentation (18-20%) • The average UK pay gap is 15.4% in favour of men. The Southwest average is 16.6% with women paid 83p for every £1 earned by male counterparts. • Women still bear the majority of caring responsibilities for both children and older relatives. • Young women between the ages of 16 and 24 have higher risk of common mental health problems and higher rates of self-harm and post-traumatic stress disorder etc. • Bristol female preventable mortality rates are significantly higher than the England rates • Nationally 27% of women experience domestic abuse in their lifetimes. The rate of recorded domestic abuse incidents in Bristol has shown a significant rise over the last two years and 74% of victims were female. • Men and boy's health is in general poorer than that of women and girl's • Male life expectancy at birth in Bristol is around four years less than for females. • On average men in Bristol live 18 years in poor health, women live 22 years in poor health • A higher proportion of boys have physical impairments and more boys than girls have diagnosed mental health disorders and learning difficulties. • Men in Bristol are more likely than women to have unhealthy lifestyle behaviours including being overweight and obese, smoking, alcohol and substance misuse • There are differences between men and women in health practices and the way they use health services • Men are three times more likely than women to take their own lives.
Mitigations:	Bristol City Council aims to take a person-centred approach to supporting service users in temporary accommodation, and we always seek to consider the needs of the families or individuals when matching them to Temporary Accommodation placements, subject to availability of suitable accommodation.
Sexual orientation	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • Lesbian, gay and bisexual people are statistically more vulnerable to verbal and physical abuse • 1 in 10 Black, Asian and Minority Ethnic LGBT staff have similarly been physically attacked because of their sexual orientation and /or gender identity, compared to 3% of White LGBT staff • One in four lesbian and bisexual women have experienced domestic abuse in a relationship, one third of them were abused by a man. Almost half of all gay and bisexual men have experienced at least one incident of domestic abuse from either a family member or a partner since the age of 16.

	<ul style="list-style-type: none"> • The Stonewall <u>LGBT in Britain - Health Report</u> shows LGBT people are at greater risk of marginalisation during health crises, and those with multiple marginalised identities can struggle even more. In communications we should signpost and refer where possible to mutual aid and community support networks². • Research has shown that LGBT people are more likely to be living with long-term health conditions, are more likely to smoke, and have higher rates of drug and alcohol use. • Half of LGBT people experienced depression in the last year • 14% of LGBT people have avoided treatment for fear of discrimination because they are LGBT.
Mitigations:	Bristol City Council aims to take a person-centred approach to supporting service users in temporary accommodation, and we always seek to consider the needs of the families or individuals when matching them to Temporary Accommodation placements, subject to availability of suitable accommodation.
Pregnancy / Maternity	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • The Equality Act 2010 applies to those who are pregnant or have given birth in the past 26 weeks, as well as making provisions to protect the rights of breastfeeding mothers. • Around 80% of women will give birth and many women will also experience termination, miscarriage and stillbirth • In the workplace we need to ensure equal access to recruitment, personal development, promotion and retention for employees who are pregnant or on maternity leave (including briefing and updates for any workforce changes) • Ensure there is equality of opportunity for services in relation to pregnancy and maternity. This includes e.g. providing physical access when using prams and pushchairs, and availability of toilets and baby-changing facilities etc., and flexible working patterns and service times for childcare arrangements • Women from minoritised ethnic backgrounds are more likely to experience complications at birth
Mitigations:	Bristol City Council aims to take a person-centred approach to supporting service users in temporary accommodation, and we always seek to consider the needs of the families or individuals when matching them to Temporary Accommodation placements, subject to availability of suitable accommodation.
Gender reassignment	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • As sexual orientation above trans people are statistically more vulnerable to verbal and physical abuse. Trans people regularly face prejudice and discrimination because of the way in which they transgress many of the norms of our culture and society.
Mitigations:	Bristol City Council aims to take a person-centred approach to supporting service users in temporary accommodation, and we always seek to consider the needs of the families or individuals when matching them to Temporary Accommodation placements, subject to availability of suitable accommodation.
Race	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • 37.7% of households on the Housing Register are from Black and minoritised ethnic backgrounds • Ethnic minorities in Bristol experience greater disadvantage than in England and Wales as a whole in education and employment and this is particularly so for Black African people².

	<ul style="list-style-type: none"> • In the last census (2011) 16% of the population belonged to a Black, Asian or minority ethnic group and this is likely to be higher now. • Although the race or ethnicity pay gap has narrowed in recent years there are still wide pay differences between particular ethnic groups and most minority ethnic groups earn less on average than White British people. • Bangladeshi, Pakistani, and Black ethnic groups are more likely to live in deprived neighbourhoods; and the same groups and Chinese ethnicities are about twice as likely to live on a low income and experience child poverty compared to White groups • Black, Asian and minoritised ethnic households are less likely to own their home and more likely to living in overcrowded housing and intergenerational households. Bangladeshi and Pakistani groups are more likely to live in multi-family households. • Organisations may lack cultural competence because minoritised ethnic staff are under- represented. • People from Black African, Other, and Black Caribbean groups have persistently high levels of unemployment and almost all ethnic minority groups in Bristol experience employment inequality when compared to White British people. • Black Asian and other minoritised ethnic groups are more likely to be self-employed than the Bristol average and over-represented in low-income self-employment including taxis, takeaway restaurants • People from minoritised ethnic backgrounds are underrepresented in political and civic leadership. • People who do not speak English as a main language may require information in plain English and community language translations or videos etc.
Mitigations:	Bristol City Council aims to take a person-centred approach to supporting service users in temporary accommodation, and we always seek to consider the needs of the families or individuals when matching them to Temporary Accommodation placements, subject to availability of suitable accommodation.
Religion or Belief	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • There are at least 45 religions represented in Bristol. Approximately 1 in 20 people in Bristol are Muslim, and Islam is the second religion in Bristol after Christianity • Budget proposals should take into account differing needs because of people’s religion and belief (for example different requirements around diet, life events, and holidays) • Having a designated multi-faith room can make environments such as workplaces and shopping centres is more accessible and friendly for people from faith groups where regular prayer is required.
Mitigations:	Bristol City Council aims to take a person-centred approach to supporting service users in temporary accommodation, and we always seek to consider the needs of the families or individuals when matching them to Temporary Accommodation placements, subject to availability of suitable accommodation.
Marriage & civil partnership	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	
Mitigations:	
OTHER RELEVANT CHARACTERISTICS	

Socio-Economic (deprivation)	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> Bristol has 41 areas in the most deprived 10% in England, including 3 in the most deprived 1%. The greatest levels of deprivation are in Hartcliffe & Withywood, Filwood and Lawrence Hill. In Bristol 15% of residents - 70,800 people - live in the 10% most deprived areas in England, including 19,000 children and 7,800 older people. There are an estimated 29,045 households living in fuel poverty in Bristol, 14.4% of all households (BEIS, 2022) 4.6% of households have experienced moderate to severe food insecurity, rising to 11.2% in the most deprived areas of the city (QoL 2021-22) 34.6% of people in Bristol are dissatisfied with the way the Council runs things, but this is 47.5% for people living in the most deprived areas of the city (QoL 2021-22). The inequalities gap in life expectancy between the most and least deprived areas in Bristol is 9.9 years for men and 6.7 years for women.
Mitigations:	Bristol City Council aims to take a person-centred approach to supporting service users in temporary accommodation, and we always seek to consider the needs of the families or individuals when matching them to Temporary Accommodation placements, subject to availability of suitable accommodation.
Carers	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> Being a carer can be a huge barrier to accessing services and maintaining employment We need to consider the timing/availability of services, events etc. to allow flexibility for carers. As with Disability and Pregnancy and Maternity – policies which aim to restrict driving or parking can have a disproportionate impact on people who are reliant on having their own transport. Studies show around 65% of adults have provided unpaid care for a loved one. Women have a 50% likelihood of being an unpaid carer by the age of 46 (by age 57 for men) Young carers are often hidden and may not recognise themselves as carers_
Mitigations:	Bristol City Council aims to take a person-centred approach to supporting service users in temporary accommodation, and we always seek to consider the needs of the families or individuals when matching them to Temporary Accommodation placements, subject to availability of suitable accommodation.
Other groups [Please add additional rows below to detail the impact for other relevant groups as appropriate e.g. Asylums and Refugees; Looked after Children / Care Leavers; Homelessness]	
Potential impacts:	
Mitigations:	

3.2 Does the proposal create any benefits for people based on their protected or other relevant characteristics?

Outline any potential benefits of the proposal and how they can be maximised. Identify how the proposal will support our [Public Sector Equality Duty](#) to:

- ✓ Eliminate unlawful discrimination for a protected group
- ✓ Advance equality of opportunity between people who share a protected characteristic and those who don't
- ✓ Foster good relations between people who share a protected characteristic and those who don't

This proposal will benefit groups who are over-represented in Temporary Accommodation. Minoritised ethnic communities, single households, and younger people are over-represented in Temporary Accommodation. Increasing the number of direct lettings with private landlords will benefit these groups, as having a larger pool of temporary accommodation means that we can better match accommodation to the specific needs of families and individuals. When working with landlords, we can target the areas where we have greater need, and where we have gaps in supply, to aim to fill these gaps.

Step 4: Impact

4.1 How has the equality impact assessment informed or changed the proposal?

What are the main conclusions of this assessment? Use this section to provide an overview of your findings. This summary can be included in decision pathway reports etc.

If you have identified any significant negative impacts which cannot be mitigated, provide a justification showing how the proposal is proportionate, necessary, and appropriate despite this.

Summary of significant negative impacts and how they can be mitigated or justified:

Summary of positive impacts / opportunities to promote the Public Sector Equality Duty:

When we ask for landlords to provide their properties for use as Temporary Accommodation, we will seek to target the areas where we have limited supply, in order to meet the specific needs of the groups mentioned above. Bristol City Council aims to take a person-centred approach to supporting service users in temporary accommodation, and we always seek to consider the needs of the families or individuals when matching them to Temporary Accommodation placements, subject to availability of suitable accommodation.

4.2 Action Plan

Use this section to set out any actions you have identified to improve data, mitigate issues, or maximise opportunities etc. If an action is to meet the needs of a particular protected group please specify this.

Improvement / action required	Responsible Officer	Timescale
All relevant EqlAs will be published on the Council's website https://www.bristol.gov.uk/council-spending-performance/council-budgets and continue to be updated as appropriate.		

4.3 How will the impact of your proposal and actions be measured?

How will you know if you have been successful? Once the activity has been implemented this equality impact assessment should be periodically reviewed to make sure your changes have been effective your approach is still appropriate.

Our Equality and Inclusion Annual Progress Reports show what we have done to achieve the aims of our Equality and Inclusion policy and strategy, and the progress we have made including reporting on all relevant KPIs and workforce diversity [Equalities policy - bristol.gov.uk](https://www.bristol.gov.uk/equalities-policy)

The Equality and Inclusion Team need at least five working days to comment and feedback on your EqlA. EqlAs should only be marked as reviewed when they provide sufficient information for decision-makers on the equalities

impact of the proposal. Please seek feedback and review from the [Equality and Inclusion Team](#) before requesting sign off from your Director¹.

Equality and Inclusion Team Review: The Equality and Inclusion Team	Director Sign-Off: Director- Housing and Landlord Services 
Date: 20/12/2023	20/12/2023

¹ Review by the Equality and Inclusion Team confirms there is sufficient analysis for decision makers to consider the likely equality impacts at this stage. This is not an endorsement or approval of the proposal.

Equality Impact Assessment [version 2.10]



Title: Invest in Highway maintenance using CAZ funding to enable long term reduction in revenue spend	
<input checked="" type="checkbox"/> Budget Proposal	<input type="checkbox"/> New <input type="checkbox"/> Already exists / review <input type="checkbox"/> Changing
Directorate: Growth and Regeneration	Lead Officer name: Shaun Taylor
Service Area: Highways and Traffic	Lead Officer role: Head of Highways

Step 1: What do we want to do?

The purpose of an Equality Impact Assessment is to assist decision makers in understanding the impact of proposals as part of their duties under the Equality Act 2010. Detailed guidance to support completion can be found here [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#).

This assessment should be started at the beginning of the process by someone with a good knowledge of the proposal and service area, and sufficient influence over the proposal. It is good practice to take a team approach to completing the equality impact assessment. Please contact the [Equality and Inclusion Team](#) early for advice and feedback.

1.1 What are the aims and objectives/purpose of this proposal?

Briefly explain the purpose of the proposal and why it is needed. Describe who it is aimed at and the intended aims / outcomes. Where known also summarise the key actions you plan to undertake. Please use plain English, avoiding jargon and acronyms. Equality Impact Assessments are viewed by a wide range of people including decision-makers and the wider public.

Budget context

Every year, the council must agree an annual budget which balances the money we spend with the money we are expecting to receive. Councils across the country are continuing to face financial challenges and based on our current forecasts, we face a funding gap over the next five years (to 2028/29) of up to £81.2 million dependent on the severity of factors such as inflation, funding changes, and unavoidable service pressures. This is in addition to the £17.7 million of savings and efficiencies proposals for 2024-2028 outlined in the 2023/24 budget and assumed delivery of 2023/24 savings in the current year.

The Council has defined statutory responsibilities, but deliver against a far broader agenda, providing universal services benefiting the whole community, and targeted services aimed at individuals, communities with particular needs, and businesses – administered by our workforce, city partners, stakeholder organisations and commissioned services.

To address these challenges we are looking across all of our services with a focus on:

- maximising our transformation programmes – where we are looking to improve services whilst achieving the best value for money
- income opportunities – where we are looking to improve our external income and most effectively apply that income
- targeted reviews – where we are looking at services that are comparatively high in cost compared to other councils to see where we can do things differently to reduce costs, be more efficient in how we do things and, in some cases, stop doing some things entirely.

This proposal

The purpose of the proposal is to use Clean Air Zone funding to assist in the repair of the highway assets such as roads, pavements, lights, traffic signals, trees and any physical infrastructure. This will ensure that the existing arrangements to maintain the highway assets are consistent and as such, no new equalities impacts have been identified. This proposal does not contain any new activities.

1.2 Who will the proposal have the potential to affect?

<input type="checkbox"/> Bristol City Council workforce	<input checked="" type="checkbox"/> Service users	<input checked="" type="checkbox"/> The wider community
<input type="checkbox"/> Commissioned services	<input checked="" type="checkbox"/> City partners / Stakeholder organisations	
Additional comments:		

1.3 Will the proposal have an equality impact?

<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	[please select]
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Could the proposal affect access levels of representation or participation in a service, or does it have the potential to change e.g. quality of life: health, education, or standard of living etc.?

If 'No' explain why you are sure there will be no equality impact, then skip steps 2-4 and request review by Equality and Inclusion Team.

If 'Yes' complete the rest of this assessment, or if you plan to complete the assessment at a later stage please state this clearly here and request review by the Equality and Inclusion Team.

We have not identified any equality impact from the proposal, which is limited in scope as funding amounts and activities remain the same. This will not affect staff or service users. It is known that there are concerns regarding equalities groups and the Clean Air Zone, these are considered in a separate EqIA. This EqIA considers only the use of funds.

Step 4: Impact

4.1 How has the equality impact assessment informed or changed the proposal?

What are the main conclusions of this assessment? Use this section to provide an overview of your findings. This summary can be included in decision pathway reports etc.

If you have identified any significant negative impacts which cannot be mitigated, provide a justification showing how the proposal is proportionate, necessary, and appropriate despite this.

Summary of significant negative impacts and how they can be mitigated or justified:

Summary of positive impacts / opportunities to promote the Public Sector Equality Duty:

4.2 Action Plan

Use this section to set out any actions you have identified to improve data, mitigate issues, or maximise opportunities etc. If an action is to meet the needs of a particular protected group please specify this.

Improvement / action required	Responsible Officer	Timescale
All relevant EqlAs will be published on the Council's website https://www.bristol.gov.uk/council-spending-performance/council-budgets and continue to be updated as appropriate.		

4.3 How will the impact of your proposal and actions be measured?

How will you know if you have been successful? Once the activity has been implemented this equality impact assessment should be periodically reviewed to make sure your changes have been effective your approach is still appropriate.

Our Equality and Inclusion Annual Progress Reports show what we have done to achieve the aims of our Equality and Inclusion policy and strategy, and the progress we have made including reporting on all relevant KPIs and workforce diversity [Equalities policy - bristol.gov.uk](https://www.bristol.gov.uk/equalities-policy)



The Equality and Inclusion Team need at least five working days to comment and feedback on your EqlA. EqlAs should only be marked as reviewed when they provide sufficient information for decision-makers on the equalities impact of the proposal. Please seek feedback and review from the [Equality and Inclusion Team](#) before requesting sign off from your Director¹.

<p>Equality and Inclusion Team Review:</p> <p>The Equality and Inclusion Team</p>	<p>Director sign off</p> 
Date: 07/12/2023	7 Dec 2023

¹ Review by the Equality and Inclusion Team confirms there is sufficient analysis for decision makers to consider the likely equality impacts at this stage. This is not an endorsement or approval of the proposal.

Equality Impact Assessment [version 2.10]



Title: GAP058 – Children and Education Operating Model Redesign	
<input checked="" type="checkbox"/> Budget Proposal	<input checked="" type="checkbox"/> New <input type="checkbox"/> Already exists / review <input type="checkbox"/> Changing
Directorate: Children and Education	Lead Officer name: Reena Bhogal-Welsh and Fiona Tudge
Service Area: ALL	Lead Officer role: Director of Education, Skills and Learning and Director of Children and Families

Step 1: What do we want to do?

The purpose of an Equality Impact Assessment is to assist decision makers in understanding the impact of proposals as part of their duties under the Equality Act 2010. Detailed guidance to support completion can be found here [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#).

This assessment should be started at the beginning of the process by someone with a good knowledge of the proposal and service area, and sufficient influence over the proposal. It is good practice to take a team approach to completing the equality impact assessment. Please contact the [Equality and Inclusion Team](#) early for advice and feedback.

1.1 What are the aims and objectives/purpose of this proposal?

Briefly explain the purpose of the proposal and why it is needed. Describe who it is aimed at and the intended aims / outcomes. Where known also summarise the key actions you plan to undertake. Please use plain English, avoiding jargon and acronyms. Equality Impact Assessments are viewed by a wide range of people including decision-makers and the wider public.

Budget context

Every year, the council must agree an annual budget which balances the money we spend with the money we are expecting to receive. Councils across the country are continuing to face financial challenges and based on our current forecasts, we face a funding gap over the next five years (to 2028/29) of up to £81.2 million dependent on the severity of factors such as inflation, funding changes, and unavoidable service pressures. This is in addition to the £17.7 million of savings and efficiencies proposals for 2024-2028 outlined in the 2023/24 budget and assumed delivery of 2023/24 savings in the current year.

The Council has defined statutory responsibilities, but deliver against a far broader agenda, providing universal services benefiting the whole community, and targeted services aimed at individuals, communities with particular needs, and businesses – administered by our workforce, city partners, stakeholder organisations and commissioned services.

To address these challenges, we are looking across all of our services with a focus on:

- maximising our transformation programmes – where we are looking to improve services whilst achieving the best value for money
- income opportunities – where we are looking to improve our external income and most effectively apply that income

- targeted reviews – where we are looking at services that are comparatively high in cost compared to other councils to see where we can do things differently to reduce costs, be more efficient in how we do things and, in some cases, stop doing some things entirely.

This Proposal

This proposal covers the redesign for the Children and Education directorate which will contribute to a balanced budget by enhancing our operational delivery of services, improving quality of practice, retaining and developing the workforce, improving governance and quality assurance and working more effectively with partners. This builds on the transformation programme that focuses largely on changes to the Directorate, which were previously agreed by Cabinet, and are currently being implemented.

The proposed redesign of the structure has also been informed by Local Authority Ofsted “health checks”, Ofsted inspections, independent reviews and best practice.

The Children and Education directorate are experiencing rising demand and receiving information about increasingly complex situations for our children and young people both directly and from referrals from our partners. This is causing capacity within the directorate to become stretched and at levels which are unsustainable.

On top of this, we are having to contend with huge external financial pressures to which we need to adapt - an unprecedented national cost of living, and social care and special education needs crises.

Therefore, the proposed new operating model will enable us to better meet the demands we are experiencing while making the service more financially sustainable long term. It will ensure the efficient use of resources (human and financial) on those things that will deliver the best outcomes for our children, young people and families in Bristol, in alignment with the Corporate Strategy and Belonging Strategy.

The redesign will be phased in two phases:

- Phase 1 Tier 4: November’23 - consultation with Heads of Service on proposed high-level operating model, associated functions and changes to the number of Heads of Service within Education and Children’s.
- Phase 2: January’24 - wider consultation with all staff in scope on the proposed restructure under each Head of Service. The Heads of Service will lead on Phase 2, including the development of proposed new structures under each Head of Service in scope.

Where colleagues are in scope of the restructure, we will carry out consultation in line with our [Managing Change Policy](#) where required. All posts in current structure have been captured and any proposed changes will have assessed against EQIA to understand the impact on any persons in those posts.

As the consultation is in two phases the EQIA will continued to be updated during the lifecycle of changes.

1.2 Who will the proposal have the potential to affect?

<input checked="" type="checkbox"/> Bristol City Council workforce	<input checked="" type="checkbox"/> Service users	<input type="checkbox"/> The wider community
<input type="checkbox"/> Commissioned services	<input type="checkbox"/> City partners / Stakeholder organisations	
Additional comments:		

1.3 Will the proposal have an equality impact?

Yes **No** [please select]

Could the proposal affect access levels of representation or participation in a service, or does it have the potential to change e.g. quality of life: health, education, or standard of living etc.?

If 'No' explain why you are sure there will be no equality impact, then skip steps 2-4 and request review by Equality and Inclusion Team.

If 'Yes' complete the rest of this assessment, or if you plan to complete the assessment at a later stage please state this clearly here and request review by the Equality and Inclusion Team.

Step 2: What information do we have?

2.1 What data or evidence is there which tells us who is, or could be affected?

Please use this section to demonstrate an understanding of who could be affected by the proposal. Include general population data where appropriate, and information about people who will be affected with particular reference to protected and other relevant characteristics: [How we measure equality and diversity \(bristol.gov.uk\)](https://www.bristol.gov.uk/how-we-measure-equality-and-diversity)

Use one row for each evidence source and say which characteristic(s) it relates to. You can include a mix of qualitative and quantitative data e.g. from national or local research, available data or previous consultations and engagement activities.

Outline whether there is any over or under representation of equality groups within relevant services - don't forget to benchmark to the local population where appropriate. Links to available data and reports are here [Data, statistics and intelligence \(sharepoint.com\)](#). See also: [Bristol Open Data \(Quality of Life, Census etc.\)](#); [Joint Strategic Needs Assessment \(JSNA\)](#); [Ward Statistical Profiles](#).

For workforce / management of change proposals you will need to look at the diversity of the affected teams using available evidence such as [HR Analytics: Power BI Reports \(sharepoint.com\)](#) which shows the diversity profile of council teams and service areas. Identify any over or under-representation compared with Bristol economically active citizens for different characteristics. Additional sources of useful workforce evidence include the [Employee Staff Survey Report](#) and [Stress Risk Assessment Form](#)

Data / Evidence Source [Include a reference where known]	Summary of what this tells us
Census 2021	The Census details the demographic profile of Bristol.
The population of Bristol Bristol Key Facts 2022	Updated annually. The report brings together statistics on the current estimated population of Bristol, recent trends in population, future projections and looks at the key characteristics of the people living in Bristol. Population Profiles for Equalities Groups bring together detailed analysis looking at equalities groups and how they differ in relation to age, health, employment, education and housing, and maps the distribution of equalities groups across the city.

Ward profile data (bristol.gov.uk)

The Ward Profiles provide a range of data-sets, including population, life expectancy, health and education disparities etc. for each of Bristol's electoral wards.

Bristol Quality of Life Survey 2021-22

The Quality of Life (QoL) survey is an annual randomised sample survey of the Bristol population, mailed to 33,000 households (with online & paper options), and some additional targeting to boost numbers from low responding groups. In brief, the most recent QoL survey indicated that inequality and deprivation continue to affect people's experience in almost every element measured by the survey.

The Quality of Life 2021/22 data dashboard highlights those indicators, wards and equality and demographic groups which are better or worse than the Bristol average.

For example there are significant disparities based on people's characteristics and circumstances in the extent to which they find it difficult to manage financially:

Quality of Life Indicator	% who find it difficult to manage financially
16 to 24 years	12.5
50 years and older	6.7
65 years and older	3.2
Female	8.6
Male	8.5
Disabled	21.6
Asian /Asian British	9.9
Black/Black British	19.8
Mixed/Multiple Ethnicity	16.3
White British	7.8
White Minority Ethnic	8.4
Lesbian Gay or Bisexual	12.7
No Religion or Faith	8.0
Christian Religion	8.3
Other Religions	18.2
Carer	10.7
Full Time Carer	14.0
Part Time Carer	9.7
Single Parent	28.6
Two Parent	9.6
Parent (all)	12.0
No Qualifications	10.0
Non-Degree Qualified	12.9

Degree Qualified	6.7
Rented (Council)	20.3
Rented (HA)	20.6
Rented (Private)	14.6
Owner Occupier	4.6
Most Deprived 10%	18.8
Bristol Average	8.7

Joint Strategic Needs Assessment (JSNA)

The Joint Strategic Needs Assessment reports on the health and wellbeing needs of the people of Bristol. It brings together detailed information on local health and wellbeing needs and looks ahead at emerging challenges and projected future needs. The JSNA is used to provide a comprehensive picture of the health and wellbeing needs of Bristol (now and in the future); to inform decisions about how we design, commission and deliver services, and also about how the urban environment is planned and managed; to improve and protect health and wellbeing outcomes across the city while reducing health inequalities; and to provide partner organisations with information on the changing health and wellbeing needs of Bristol, at a local level, to support better service delivery.

HR Analytics: Power BI reports (sharepoint.com) [internal link only]

Equality and Inclusion annual progress report 2021-22 (bristol.gov.uk)

Appendix – Workforce Diversity Data – summary analysis

Additional sources of useful workforce evidence include the Employee Staff Survey Report and Stress Risk Assessment Form completed by individuals and teams [internal links only]

The Workforce Diversity Report shows Bristol City Council Workforce Diversity statistics for Headcount, Sickness, Starters and Leavers data. The report is updated once a month with data as at the end of the previous month. It excludes data for locally managed schools/nurseries, councillors, casual, seasonal and external agency employees. The report is based on the sensitive information that staff add to Employee Self Service on iTrent (ESS).

Summary of Children and Education Workforce data

	Children & Education Headcount	BCC Headcount	Bristol Working Age %
	%	%	
16-29	12	12	39
30-39	26	22	24
40-49	28	25	16
50-64	34	41	21
Asian or Asian British	2	3	6
Black or Black British	6	5	5
Mixed	3	3	3
Other Ethnic Groups	1	1	1

White	71	78	85
Prefer not to Say	1	2	0
Unknown	16	8	0
Femal	81	61	49
Male	19	38	51
Use another Term	0	0	0
Prefer not to Say	0	1	0
Christian	23	26	44
Other Religion or Belief	6	6	7
No Religion or Belief	41	43	42
Prefer not to Say	14	16	7
Unknown	16	9	0
LGB	6	6	9
Heterosexual	65	70	91
Prefer not to Say	13	16	0
Unknown	16	8	0
Disabled	6	9	12
Not Disabled	57	65	88
Prefer not to Say	3	3	0
Unknown	34	23	0
Civil Partnership	0	0	0
Declared Partnership	0	0	0
Divorced	2	2	0
Married	18	18	0
Partner	9	7	0
Single	13	13	0
Widowed	0	0	0
Prefer not to Say	2	2	0
Unknown	56	58	0

Age - Younger staff are under-represented within Children and Education in comparison to wider Bristol Working Age population, which needs to be addressed through the operating model such as apprenticeships and as part of succession planning. Highest percentage of workforce within Children and Education is 40 to 64 years old.

Ethnicity – Asian/Asian British is under-represented within Children and Education in comparison to BCC and wider Bristol Ethnicity population, which needs to be addressed through its Children and Education Workforce and Talent Management Strategy as part of the operating model. Black or Black British has a good representation when compared to BCC and wider Bristol Ethnicity population. A high representation of Children and Education workforce who have identified as unknown ethnicity in comparison to BCC.

Sex – Identifying as male is significantly under-represented in Children and Education in comparison to BCC and wider Bristol Population

	<p>which needs to be addressed through its Children and Education Workforce and Talent Management Strategy as part of the operating model. The negative gender pay gap seen in Children and Education is due to the higher proportion of women in senior roles within the pay structure, which means that women are more likely to be paid more than men. Women could be disproportionately impacted because they are generally over-represented in the Council’s workforce. This would depend on the demographics of employees affected by changes in roles or loss of jobs.</p> <p>Sexual Orientation - Identifying as LGB in Children and Education is in line with BCC data but still under-represented against Bristol wider population. A high representation of Children and Education workforce who have identified as unknown sexual orientation in comparison to BCC.</p> <p>Trans - Trans people are under-represented in Children and Education and there is no comparative data for the Bristol Working Age population.</p> <p>Disability – staff with a disability is under-represented in Children and Education in comparison to BCC and wider Bristol Population which needs to be addressed through its Children and Education Workforce and Talent Management Strategy as part of the operating model.</p> <p>Demographic data is available for employees but will be used for internal purposes only for sensitivity reasons.</p>
<p><u>Nomis - Official Labour Market Statistics (nomisweb.co.uk)</u></p> <p><u>Business demography, UK - Office for National Statistics (ons.gov.uk)</u></p>	<p>84% of all people in Bristol are economically active which is higher than nationally (78.6%) and in the Southwest (80.7%). Of economically active people in Bristol 6.9% are self-employed, compared to 9.5% nationally. Of those who are economically inactive in Bristol, 33% are Students, 29% are ‘long-term sick’ and 16% are looking after family/home, as well as 9.2% who are retired. The percentage of ‘workless households’ in Bristol is 12.1%, compared to 13.6% nationally, and the proportion of working age people who are benefit claimants is 11.2%. Bristol has a higher proportion of people working in ‘professional occupations’ (36.2) than for the Southwest (24.4%) and nationally (25.8%).</p> <p>In 2020 (most recent data) the Southwest continued to have the highest five-year ‘survival rate’ in the UK of businesses that survived into 2020 (this has been the case since 2012). The largest proportion of these surviving businesses, 22%, was in the professional, scientific and technical industry.</p>

Bristol One City: Cost of Living Crisis – Bristol’s One City approach to supporting citizens and communities (Oct 2022)

The rising cost of living is not impacting on everyone equally. People who are already experiencing inequity and poverty will be disproportionately impacted:

- **People on the lowest incomes** - will have less available income but also pay more for the same services. For example, people unable to pay their bills by Direct Debit and those borrowing money are subject to higher costs and interest rates. This is what anti-poverty campaign group Fair by Design has referred to as a Poverty Premium
- **Households with pre-payment energy meters** - households with pre-payment meters often pay above-average costs for their fuel. They will face a significant rise in their monthly bills in autumn and winter with increased energy usage as they do not benefit from the “smoothing” effect of Direct Debits, which spread usage costs evenly across the year
- **Parents and young families** – parents of young children are more likely to seek credit and alternative support as they are less able, on average, to afford an unexpected expense. Single parents will be disproportionately affected; and one in four single parents find it difficult to manage financially (28.6%).
- **Persons who identify as disabled** – just under half of all people in poverty in the UK identify as a disabled people or someone living with a disabled person. Disabled people have higher living costs, and tend to pay more for their heating, travel, food/diet, prescription payments, and specialist equipment. It is estimated that UK households that include disabled children pay on average £600 more for their energy bills than an average household
- **Black and Minoritised people** – A higher proportion of Black and minoritised ethnic groups reported finding it difficult to manage financially (14.9%) in 2021. In 2020 the Social Metrics Commission found that almost half of people living in a family in the UK where the head of the household is Black are in poverty. Age UK report that poverty among older Black and minoritised ethnic groups is twice as high as for white pensioners
- **People in rented accommodation** – it is estimated that 69% of low-income private renters in England will be forced to go without food and heating at least one day per week to meet rising housing and living cost. Almost three in ten homes in Bristol are privately rented
- **Underserved populations** - It is likely that populations that are not typically well represented in data and research are likely to also face increased risk from rising cost of living. For example, refugees and asylum seekers, people experiencing homelessness, and Gypsy/Roma/Traveller groups.

<p><u>An evaluation of the Bristol Race Equality Covid-19 Steering Group</u></p> <p><u>Designing a new social reality - Research on the impact of covid-19 on Bristol's VCSE sector and what the future should be – Black South West Network 2020</u></p> <p><u>Delivering an inclusive economy post COVID-19</u></p>	<p>Report focusing on how co-production using a One City approach has been used to respond to the disproportionate impact of the Covid-19 pandemic on our marginalized ethnic communities.</p> <p>Local research has highlighted how long-term underinvestment and lack of equity in funding and procurement has eroded the local Voluntary and community sector.</p> <p>Our local partners have conducted research into the ongoing impact of COVID-19 for women and have provided recommendations on what service providers can do to reduce impact further impact.</p>
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2.2 Do you currently monitor relevant activity by the following protected characteristics?

<input checked="" type="checkbox"/> Age <input checked="" type="checkbox"/> Marriage and Civil Partnership <input checked="" type="checkbox"/> Religion or Belief	<input checked="" type="checkbox"/> Disability <input checked="" type="checkbox"/> Pregnancy/Maternity <input checked="" type="checkbox"/> Sex	<input checked="" type="checkbox"/> Gender Reassignment <input checked="" type="checkbox"/> Race <input checked="" type="checkbox"/> Sexual Orientation
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2.3 Are there any gaps in the evidence base?

Where there are gaps in the evidence, or you don't have enough information about some equality groups, include an equality action to find out in section 4.2 below. This doesn't mean that you can't complete the assessment without the information, but you need to follow up the action and if necessary, review the assessment later. If you are unable to fill in the gaps, then state this clearly with a justification.

For workforce related proposals all relevant characteristics may not be included in HR diversity reporting (e.g. pregnancy/maternity). For smaller teams diversity data may be redacted. A high proportion of not known/not disclosed may require an action to address under-reporting.

Although our corporate approach is to collect diversity monitoring for all relevant characteristics, there are gaps in the available local diversity data for some characteristics, especially where this has not always historically been included in census and statutory reporting e.g. for sexual orientation.

We also know there are some under-reporting gaps in our workforce diversity information - where personal and confidential information is voluntarily requested from staff.

2.4 How have you involved communities and groups that could be affected?

You will nearly always need to involve and consult with internal and external stakeholders during your assessment. The extent of the engagement will depend on the nature of the proposal or change. This should usually include individuals and groups representing different relevant protected characteristics. Please include details of any completed engagement and consultation and how representative this had been of Bristol's diverse communities.

Include the main findings of any engagement and consultation in Section 2.1 above.

If you are managing a workforce change process or restructure please refer to [Managing change or restructure \(sharepoint.com\)](#) for advice on consulting with employees etc. Relevant stakeholders for engagement about workforce changes may include e.g. staff-led groups and trades unions as well as affected staff.

For Phase 1 Tier 4 workforce were briefed on the overall proposal and rationale for the redesign and associated savings before the workforce consultation went live. Engagement is underway to discuss options and ideas, and where any colleagues are in scope for a specific saving proposal, we will carry out consultation in line with our Managing Change Policy where required.

For Phase 2, the workforce were briefed on proposal for redesign and rationale. Where any colleagues are in scope for a specific saving proposal, we will carry out consultation in line with our Managing Change Policy where required.

2.5 How will engagement with stakeholders continue?

Explain how you will continue to engage with stakeholders throughout the course of planning and delivery. Please describe where more engagement and consultation is required and set out how you intend to undertake it. Include any targeted work to seek the views of under-represented groups. If you do not intend to undertake it, please set out your justification. You can ask the Equality and Inclusion Team for help in targeting particular groups.

All responses to the Budget Consultation will be analysed and included in the Council's Budget report that will be published on the Bristol City Council website in early 2023. We will take Budget consultation responses into account when developing this and other final proposals to put to the Cabinet and a meeting of the Full Council for approval. The final decision will be taken by Full Council at its budget setting meeting in February / March 2024.

Engagement with workforce as part of the proposed changes:

Phase 2 workforce will be kept apprised on the outcomes of Phase 1 and will be consulted in line with the Managing Change policy as part of Phase 1. Where any jobs are subject to change, we will prioritise redeployment opportunities for affected colleagues.

Engagement will continue throughout the lifecycle of the redesign through Directorate Briefings, Drop-in sessions and 121 meetings.

Step 3: Who might the proposal impact?

Analysis of impacts must be rigorous. Please demonstrate your analysis of any impacts of the proposal in this section, referring to evidence you have gathered above, and the characteristics protected by the Equality Act 2010. Also include details of existing issues for particular groups that you are aware of and are seeking to address or mitigate through this proposal. See detailed guidance documents for advice on identifying potential impacts etc. [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#)

3.1 Does the proposal have any potentially adverse impacts on people based on their protected or other relevant characteristics?

Consider sub-categories (different kinds of disability, ethnic background etc.) and how people with combined characteristics (e.g. young women) might have particular needs or experience particular kinds of disadvantage.

Where mitigations indicate a follow-on action, include this in the 'Action Plan' Section 4.2 below.

GENERAL COMMENTS (highlight any potential issues that might impact all or many groups)

Even when we plan to consult in more detail on specific service delivery proposals at a later time, we must ensure that any budget setting decisions that are likely to affect future services are informed by sufficient consultation and proper analysis. This is so that decision makers can have due regard to any likely disproportionate or negative impact on the basis of their protected and other relevant characteristics at the time the budget is approved – not afterwards¹.

Decision makers will have the ability to make changes to the individual spending plans following further consultation as appropriate and detailed evaluation of the impact of specific proposals. Within the proposed budget envelope there will be financial mitigation put aside for any non-delivery or amendments to proposals which may occur due to future consideration of equalities issues or other factors.

As well as identifying whether budget changes will have a disproportionate impact on particular groups (e.g., because they are over-represented in a particular cohort), we need to pay particular attention to the risk of indirect discrimination: when an apparently neutral decision puts members of a given group at a particular disadvantage compared with other people because of their different needs and circumstances.

We are also aware of existing structural inequalities and particular considerations, issues, and disparities for people in Bristol based on their characteristics, which we will take into account.

Phase 1 of the operating model has been completed, no adverse impacts were identified on members of the workforce based on their protected or other relevant characteristics.

At this stage, for Phase 2 there is insufficient detailed information on who might be impacted by the proposals, however, we are aware that workforce changes can disproportionately affect employees with particular protected characteristics and therefore we are seeking to mitigate impacts through holding vacancies, succession planning, voluntary redundancy where appropriate, and a range of support for staff. Furthermore, any under-representations will be addressed through its Children and Education Workforce and Talent Management strategy as part of the operating model.

Any subsequent proposals for service changes will be subject to their own Equality Impact Assessments to consider detailed issues for employees based on their protected and other relevant characteristics and inequality of pay. Mitigations will be in place for any risks identified regarding indirect discrimination which may arise from changes affecting workers with particular characteristics e.g. because they are over-represented in affected teams.

- The Council’s Managing Change Policy will apply. The policy sets out expectations regarding consultation, who should have priority consideration for vacancies, redeployment to other roles across the Council and pay protection.
- Tight controls on the engagement, extension and conversion of agency and fixed term workers
- Review of funded vacant positions – where those that can be left unfilled either for a period or permanently are be frozen/deleted as appropriate and others will be used as opportunities for those in redeployment.
- Ongoing implementation of the Succession Planning Policy which has enabled managers to apply to leave the council on a voluntary basis. This has reduced the cost of the Council’s management structure and opened up development opportunities for other Council staff.
- A range of support will be made available alongside any workforce changes, including well-being support for all colleagues, job search support for those at risk of redundancy (whether voluntary or compulsory)
- The proposals include the pilot of a bursary scheme to improve long term retention of social work students; social worker academy, international social worker recruitment and Care Leaver apprenticeships as part of our future operating model improving the impact of our entry to social work and other service routes.
- Pro-active matching of redeployees (for those at risk of redundancy or medical redeployment) to Suitable Alternative Employment and support and development plans for those redeployed to other jobs.
- Workforce efficiencies and changes may have a disproportionate impact on specific protected characteristics unless emerging accessibility issues are mitigated through ongoing equality impact assessment and liaison with Staff Led Groups for example the Disabled Colleagues Network prior to implementation.

Further mitigations will be identified during the course of consultation and implementation.

PROTECTED CHARACTERISTICS

Age: Young People

Does your analysis indicate a disproportionate impact? Yes No

Potential impacts:	<p>Younger staff are under-represented within Children and Education in comparison to wider Bristol Working Age population. Highest percentage of workforce within Children and Education is 40 to 64 years old.</p> <p>Reduction in staff number and less recruitment could mean it will take longer to address the under-representation of young people.</p>
Mitigations:	<p>Ensure as part of the operating model includes apprenticeship and graduate roles and as part of succession planning. Refer to general comments above. Further mitigations will be identified during the course of consultation and implementation.</p>
Age: Older People	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	Potential that older staff apply for voluntary redundancy.
Mitigations:	<p>Highest percentage of workforce within Children and Education is 40 to 64 years old.</p> <p>At this stage, please refer to general comments above. Further mitigations will be identified during the course of consultation and implementation.</p>
Disability	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<p>Staff who identify as a Disabled person are under-represented in Children and Education in comparison to BCC and the wider Bristol Population. The representation of Disabled persons in the service could be impacted by changes – for example, if reasonable adjustments are not promptly and properly made in selection processes and redeployment situations</p>
Mitigations:	<p>Mitigations will be in place for any risks identified regarding indirect discrimination which may arise from changes affecting workers with particular characteristics e.g. because they are over-represented in affected teams. Emerging accessibility issues are mitigated through ongoing equality impact assessment and liaison with stakeholders e.g. the Disabled Colleagues Network and Disability and Wellbeing Advisor prior to implementation</p> <p>Prior to any consultation will identify what reasonable adjustments need to be made for any staff impacted by the changes and any considerations that need to be made as part of the consultation process for example Case for Change accessible in large print.</p> <p>Further mitigations will be identified during the course of consultation and implementation.</p>
Sex	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<p>Identifying as male is significantly under-represented in Children and Education in comparison to BCC and wider Bristol Population which needs to be addressed through its Children and Education Workforce and Talent Management Strategy as part of the operating model. The negative gender pay gap seen in Children and Education is due to the higher proportion of women in senior roles within the pay structure, which means that women are more likely to be paid more than men. Women could be disproportionately impacted because they are generally over-represented in the Council's workforce. This would depend on the demographics of employees affected by changes in roles or loss of jobs.</p>
Mitigations:	<p>At this stage, please refer to general comments above. Further mitigations will be identified during the course of consultation and implementation.</p>
Sexual orientation	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<p>Identifying as LGB in Children and Education is in line with BCC data but still under-represented against Bristol wider population. A high representation of Children and Education workforce who have identified as unknown sexual</p>

	orientation in comparison to BCC. Representation of Lesbian, gay and bisexual people in the service could be impacted by workforce changes.
Mitigations:	At this stage, please refer to general comments above. Further mitigations will be identified during the course of consultation and implementation.
Pregnancy / Maternity	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	Colleagues on maternity leave may be less able to engage in change processes and could be overlooked.
Mitigations:	Once staff identified as in scope, will establish any of those staff who may be on maternity leave or paternity leave and agree with those how they would like to be kept informed of changes and how they would like to be engaged during consultation period. Further mitigations will be identified during the course of consultation and implementation.
Gender reassignment	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	People may not disclose gender reassignment and may not be an accurate representation and will be difficult to identify what the impacts might be at this stage. Very few employees have made a declaration around gender reassignment and there is no comparative data for the Bristol Working Age population.
Mitigations:	At this stage, please refer to general comments above. Further mitigations will be identified during the course of consultation and implementation.
Race	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	Asian/Asian British is under-represented within Children and Education in comparison to BCC and wider Bristol Ethnicity population. Black or Black British has a good representation when compared to BCC and wider Bristol Ethnicity population. A concern is the high representation of Children and Education workforce who have identified as unknown ethnicity. Under-representation of Black, Asian and Minority Ethnic staff within the service and the race pay gap could be impacted by this change.
Mitigations:	Mitigations will be in place for any risks identified regarding indirect discrimination which may arise from changes affecting workers with particular characteristics e.g. because they are over-represented in affected teams. Emerging issues are mitigated through ongoing equality impact assessment and liaison with embRACE staff network group. At this stage, please refer to general comments above. Further mitigations will be identified during the course of consultation and implementation.
Religion or Belief	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	This proposal could compound under-representation within the service
Mitigations:	At this stage, please refer to general comments above. Further mitigations will be identified during the course of consultation and implementation.
Marriage & civil partnership	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	Given the limited data available it is difficult to identify what the impacts might be.
Mitigations:	
OTHER RELEVANT CHARACTERISTICS	

Socio-Economic (deprivation)	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	This proposal might further compound the under-representation of staff who live in the most deprived wards.
Mitigations:	At this stage, please refer to general comments above. Further mitigations will be identified during the course of consultation and implementation.
Carers	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	Given the limited data available it is difficult to identify what the impacts might be.
Mitigations:	At this stage, please refer to general comments above. Further mitigations will be identified during the course of consultation and implementation.
Other groups [Please add additional rows below to detail the impact for any other relevant groups as appropriate e.g. asylum seekers and refugees; care experienced; homelessness; armed forces personnel and veterans]	
Potential impacts:	This proposal might further compound the under-representation of staff who are care leavers, homelessness etc
Mitigations:	At this stage, please refer to general comments above. Further mitigations will be identified during the course of consultation and implementation.

3.2 Does the proposal create any benefits for people based on their protected or other relevant characteristics?

Outline any potential benefits of the proposal and how they can be maximised. Identify how the proposal will support our [Public Sector Equality Duty](#) to:

- ✓ Eliminate unlawful discrimination for a protected group
- ✓ Advance equality of opportunity between people who share a protected characteristic and those who don't
- ✓ Foster good relations between people who share a protected characteristic and those who don't

The scale of the potential gap in Children and Education means that there is very limited opportunity to bring genuine additional benefit to equalities groups in the circumstances. However we have considered as far as possible the need to: eliminate discrimination, harassment, victimisation and any other conduct prohibited under the Equality Act 2010; advance equality of opportunity between people from different groups; and foster good relations between people from different groups.

Our budget savings proposals are aligned to our Corporate Strategy and although we have limited resources our future focus will be on achieving those priorities we have identified including tackling poverty and intergenerational inequality.

We are primarily focusing on mitigating the negative impacts of the proposals however we will seek opportunities for developing future leaders and address equality gaps and continue to develop a service that is representative of the city we serve..

Step 4: Impact

4.1 How has the equality impact assessment informed or changed the proposal?

What are the main conclusions of this assessment? Use this section to provide an overview of your findings. This summary can be included in decision pathway reports.

If you have identified any significant negative impacts which cannot be mitigated, provide a justification showing how the proposal is proportionate, necessary, and appropriate despite this.

Summary of significant negative impacts and how they can be mitigated or justified:
Please refer to 3.1 above. Change processes could have a differential impact based on age. Difficulties in recruitment and retainment of staff could compound existing under-representations and mean it will take longer to address them.
Summary of positive impacts / opportunities to promote the Public Sector Equality Duty:
Please refer to 3.2 above.

4.2 Action Plan

Use this section to set out any actions you have identified to improve data, mitigate issues, or maximise opportunities etc. If an action is to meet the needs of a particular protected group please specify this.

Improvement / action required	Responsible Officer	Timescale
All relevant EqlAs will be published on the Council’s website https://www.bristol.gov.uk/council-spending-performance/council-budgets and continue to be updated as appropriate.		
Phase 1: Operating Model Head of Service	Vanessa Wilson	December 2023
Phase 1: Recruitment to Head of Service Vacancies	Fiona Tudge & Reena Bhogal-Welsh	January 2024
Re-grading of our Social Care Social Worker roles to align to market rates	Fiona Tudge	January 2024
Phase 2: Operating Model – Wider Service	Fiona Tudge & Reena Bhogal-Welsh	April 2023
International Social Worker recruitment	Becky Lewis	April 2024
Care-leaver apprentices within our new model	Vanessa Wilson	June 2024
Implementation of Children and Education Workforce and Workplace Strategy	Vanessa Wilson	June 2024

4.3 How will the impact of your proposal and actions be measured?

How will you know if you have been successful? Once the activity has been implemented this equality impact assessment should be periodically reviewed to make sure your changes have been effective your approach is still appropriate.

Our Equality and Inclusion Annual Progress Reports show what we have done to achieve the aims of our Equality and Inclusion policy and strategy, and the progress we have made including reporting on all relevant KPIs and workforce diversity Equalities policy - bristol.gov.uk
Our Equality and Inclusion Annual Progress Reports show what we have done to achieve the aims of our Equality and Inclusion policy and strategy, and the progress we have made including reporting on all relevant KPIs and workforce diversity Equalities policy - bristol.gov.uk Representation levels across the service will be monitored via the HR Dashboard.

The Equality and Inclusion Team need at least five working days to comment and feedback on your EqlA. EqlAs should only be marked as reviewed when they provide sufficient information for decision-makers on the equalities

impact of the proposal. Please seek feedback and review from the [Equality and Inclusion Team](#) before requesting sign off from your Director¹.

Equality and Inclusion Team Review: Reviewed by the Equality and Inclusion Team	Director Sign-Off:  Vanessa Wilson Director of Children and Education Transformation
Date: 22/12/2023	22/12/23

¹ Review by the Equality and Inclusion Team confirms there is sufficient analysis for decision makers to consider the likely equality impacts at this stage. This is not an endorsement or approval of the proposal.

Equality Impact Assessment [version 2.10]



Title: Reduction in discretionary learning and development spend	
<input checked="" type="checkbox"/> Budget Proposal	<input type="checkbox"/> New <input checked="" type="checkbox"/> Already exists / review <input type="checkbox"/> Changing
Directorate: Resources	Lead Officer name: Steph Griffin
Service Area: Workforce and Change	Lead Officer role: James Brereton

Step 1: What do we want to do?

The purpose of an Equality Impact Assessment is to assist decision makers in understanding the impact of proposals as part of their duties under the Equality Act 2010. Detailed guidance to support completion can be found here [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#).

This assessment should be started at the beginning of the process by someone with a good knowledge of the proposal and service area, and sufficient influence over the proposal. It is good practice to take a team approach to completing the equality impact assessment. Please contact the [Equality and Inclusion Team](#) early for advice and feedback.

1.1 What are the aims and objectives/purpose of this proposal?

Briefly explain the purpose of the proposal and why it is needed. Describe who it is aimed at and the intended aims / outcomes. Where known also summarise the key actions you plan to undertake. Please use [plain English](#), avoiding jargon and acronyms. Equality Impact Assessments are viewed by a wide range of people including decision-makers and the wider public.

Budget context

Every year, the council must agree an annual budget which balances the money we spend with the money we are expecting to receive. Councils across the country are continuing to face financial challenges and based on our current forecasts, we face a funding gap over the next five years (to 2028/29) of up to £81.2 million dependent on the severity of factors such as inflation, funding changes, and unavoidable service pressures. This is in addition to the £17.7 million of savings and efficiencies proposals for 2024-2028 outlined in the 2023/24 budget and assumed delivery of 2023/24 savings in the current year.

The Council has defined statutory responsibilities, but deliver against a far broader agenda, providing universal services benefiting the whole community, and targeted services aimed at individuals, communities with particular needs, and businesses – administered by our workforce, city partners, stakeholder organisations and commissioned services.

To address these challenges, we are looking across all of our services with a focus on:

- maximising our transformation programmes – where we are looking to improve services whilst achieving the best value for money
- income opportunities – where we are looking to improve our external income and most effectively apply that income
- targeted reviews – where we are looking at services that are comparatively high in cost compared to other councils to see where we can do things differently to reduce costs, be more efficient in how we do things and, in some cases, stop doing some things entirely.

This proposal

To reduce discretionary spend on learning and development by £50,000. This will be done by prioritising funding for statutory or mandatory training and for learning and development that is in direct support of organisational priorities such as:

- Equality and inclusion
- Leadership development
- Health and wellbeing
- Performance and talent development

Learning and development is one of the ways that we are seeking to improve our equality and inclusion practice and overcome disparity within the workforce. This proposal will protect all equality and inclusion training and development activities in our workforce strategy and equality action plan so we can continue this work. However, there is likely to be some impact on those with particular protected characteristics with a reduction in discretionary spend on core skills training or continuous professional development.

1.2 Who will the proposal have the potential to affect?

<input checked="" type="checkbox"/> Bristol City Council workforce	<input type="checkbox"/> Service users	<input type="checkbox"/> The wider community
<input type="checkbox"/> Commissioned services	<input type="checkbox"/> City partners / Stakeholder organisations	
Additional comments:		

1.3 Will the proposal have an equality impact?

<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	[please select]
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Could the proposal affect access levels of representation or participation in a service, or does it have the potential to change e.g. quality of life: health, education, or standard of living etc.?

If 'No' explain why you are sure there will be no equality impact, then skip steps 2-4 and request review by Equality and Inclusion Team.

If 'Yes' complete the rest of this assessment, or if you plan to complete the assessment at a later stage please state this clearly here and request review by the Equality and Inclusion Team.

Step 2: What information do we have?

2.1 What data or evidence is there which tells us who is, or could be affected?

Please use this section to demonstrate an understanding of who could be affected by the proposal. Include general population data where appropriate, and information about people who will be affected with particular reference to protected and other relevant characteristics: [How we measure equality and diversity \(bristol.gov.uk\)](http://bristol.gov.uk)

Use one row for each evidence source and say which characteristic(s) it relates to. You can include a mix of qualitative and quantitative data e.g. from national or local research, available data or previous consultations and engagement activities.

Outline whether there is any over or under representation of equality groups within relevant services - don't forget to benchmark to the local population where appropriate. Links to available data and reports are here [Data, statistics and intelligence \(sharepoint.com\)](#). See also: [Bristol Open Data \(Quality of Life, Census etc.\)](#); [Joint Strategic Needs Assessment \(JSNA\)](#); [Ward Statistical Profiles](#).

For workforce / management of change proposals you will need to look at the diversity of the affected teams using available evidence such as [HR Analytics: Power BI Reports \(sharepoint.com\)](#) which shows the diversity profile of council teams and service areas. Identify any over or under-representation compared with Bristol economically active citizens for different characteristics. Additional sources of useful workforce evidence include the [Employee Staff Survey Report](#) and [Stress Risk Assessment Form](#)

Data / Evidence Source [Include a reference where known]	Summary of what this tells us																														
Census 2021	The Census details the demographic profile of Bristol.																														
The population of Bristol Bristol Key Facts 2022	Updated annually. The report brings together statistics on the current estimated population of Bristol, recent trends in population, future projections and looks at the key characteristics of the people living in Bristol. Population Profiles for Equalities Groups bring together detailed analysis looking at equalities groups and how they differ in relation to age, health, employment, education and housing, and maps the distribution of equalities groups across the city.																														
<p>HR Analytics: Power BI reports (sharepoint.com) [internal link only]</p> <p>Equality and Inclusion annual progress report 2021-22 (bristol.gov.uk) Appendix – Workforce Diversity Data – summary analysis</p> <p>Additional sources of useful workforce evidence include the Employee Staff Survey Report and Stress Risk Assessment Form completed by individuals and teams [internal links only]</p>	<p>The Workforce Diversity Report shows Bristol City Council Workforce Diversity statistics for Headcount, Sickness, Starters and Leavers data. The report is updated once a month with data as at the end of the previous month. It excludes data for locally managed schools/nurseries, councillors, casual, seasonal and external agency employees. The report is based on the sensitive information that staff add to Employee Self Service on iTrent (ESS).</p> <p>Summary of Bristol City Council workforce diversity</p> <table border="1" data-bbox="655 1644 1511 2119"> <thead> <tr> <th></th> <th>BCC headcount % (31 Oct 2022)</th> <th>Bristol Working Age Population (16-64)</th> </tr> </thead> <tbody> <tr> <td>Age 16-29</td> <td>12.2%</td> <td>39.0%</td> </tr> <tr> <td>Age 30-39</td> <td>22.0%</td> <td>24.0%</td> </tr> <tr> <td>Age 40-49</td> <td>24.4%</td> <td>16.0%</td> </tr> <tr> <td>Age 50-64</td> <td>41.4%</td> <td>21.0%</td> </tr> <tr> <td>Age 65+</td> <td>3.4%</td> <td>-</td> </tr> <tr> <td>Disabled</td> <td>9.0%</td> <td>12%</td> </tr> <tr> <td>Asian / Asian British</td> <td>2.9%</td> <td>5.8%</td> </tr> <tr> <td>Black / Black British</td> <td>5.1%</td> <td>5.3%</td> </tr> <tr> <td>Mixed ethnicity</td> <td>3.6%</td> <td>2.9%</td> </tr> </tbody> </table>		BCC headcount % (31 Oct 2022)	Bristol Working Age Population (16-64)	Age 16-29	12.2%	39.0%	Age 30-39	22.0%	24.0%	Age 40-49	24.4%	16.0%	Age 50-64	41.4%	21.0%	Age 65+	3.4%	-	Disabled	9.0%	12%	Asian / Asian British	2.9%	5.8%	Black / Black British	5.1%	5.3%	Mixed ethnicity	3.6%	2.9%
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	Other ethnic groups	0.4%	1.0%
	White	79.8%	85.0%
	Female	60.1%	49.0%
	Male	39.3%	51.0%
	Use another gender term	0.2%	-
	Christian	25.9%	43.5%
	Other religion/belief	6.6%	7.3%
	No religion/belief	41.9%	41.5%
	Lesbian, Gay or Bisexual	5.9%	9.1%
	Trans	0.1%	-
<p>Nomis - Official Labour Market Statistics (nomisweb.co.uk)</p> <p>Business demography, UK - Office for National Statistics (ons.gov.uk)</p>	<p>84% of all people in Bristol are economically active which is higher than nationally (78.6%) and in the South West (80.7%). Of economically active people in Bristol 6.9% are self-employed, compared to 9.5% nationally. Of those who are economically inactive in Bristol, 33% are Students, 29% are 'long-term sick' and 16% are looking after family/home, as well as 9.2% who are retired. The percentage of 'workless households' in Bristol is 12.1%, compared to 13.6% nationally, and the proportion of working age people who are benefit claimants is 11.2%. Bristol has a higher proportion of people working in 'professional occupations' (36.2) than for the South West (24.4%) and nationally (25.8%).</p> <p>In 2020 (most recent data) the South West continued to have the highest five-year 'survival rate' in the UK of businesses that survived into 2020 (this has been the case since 2012). The largest proportion of these surviving businesses, 22%, was in the professional, scientific and technical industry.</p>		

2.2 Do you currently monitor relevant activity by the following protected characteristics?

<input checked="" type="checkbox"/> Age	<input checked="" type="checkbox"/> Disability	<input checked="" type="checkbox"/> Gender Reassignment
<input type="checkbox"/> Marriage and Civil Partnership	<input type="checkbox"/> Pregnancy/Maternity	<input checked="" type="checkbox"/> Race
<input checked="" type="checkbox"/> Religion or Belief	<input checked="" type="checkbox"/> Sex	<input checked="" type="checkbox"/> Sexual Orientation

2.3 Are there any gaps in the evidence base?

Where there are gaps in the evidence, or you don't have enough information about some equality groups, include an equality action to find out in section 4.2 below. This doesn't mean that you can't complete the assessment without the information, but you need to follow up the action and if necessary, review the assessment later. If you are unable to fill in the gaps, then state this clearly with a justification.

For workforce related proposals all relevant characteristics may not be included in HR diversity reporting (e.g. pregnancy/maternity). For smaller teams diversity data may be redacted. A high proportion of not known/not disclosed may require an action to address under-reporting.

Although our corporate approach is to collect diversity monitoring for all relevant characteristics, there are gaps in the available local diversity data for some characteristics, especially where this has not always historically been included in census and statutory reporting e.g. for sexual orientation. We also know there are some under-reporting gaps in our workforce diversity information - where personal and confidential information is voluntarily requested from staff.

The HR Diversity by training dashboard doesn't include marriage and civil partnership or pregnancy/maternity, so we don't have demographic reporting on access to learning and development from people with these protected characteristics to compare with the overall workforce data. Also, the HR dashboard is limited to corporate courses, so a wide range of learning and development isn't included such as e-learning. Another limitation is that most service specific training and development isn't included in the HR dashboard because it involves less than 50 people, (due to data confidentiality so it can't be included).

2.4 How have you involved communities and groups that could be affected?

You will nearly always need to involve and consult with internal and external stakeholders during your assessment. The extent of the engagement will depend on the nature of the proposal or change. This should usually include individuals and groups representing different relevant protected characteristics. Please include details of any completed engagement and consultation and how representative this had been of Bristol's diverse communities.

Include the main findings of any engagement and consultation in Section 2.1 above.

If you are managing a workforce change process or restructure please refer to [Managing change or restructure \(sharepoint.com\)](#) for advice on consulting with employees etc. Relevant stakeholders for engagement about workforce changes may include e.g. staff-led groups and trades unions as well as affected staff.

We launched a public consultation on our budget proposals between 09th November 2023 to the 21st December 2023. This consultation set out all the savings proposals we had identified to produce a balanced budget in the context of reduced available funding and increasing financial pressures.

We will have regular dialogue with our trade union learning reps and staff led groups as this proposal is developed so that we continue to assess and mitigate the impact on those from equality groups.

2.5 How will engagement with stakeholders continue?

Explain how you will continue to engage with stakeholders throughout the course of planning and delivery. Please describe where more engagement and consultation is required and set out how you intend to undertake it. Include any targeted work to seek the views of under-represented groups. If you do not intend to undertake it, please set out your justification. You can ask the Equality and Inclusion Team for help in targeting particular groups.

All responses to the Budget Consultation will be analysed and included in the Council's Budget report that will be published on the Bristol City Council website in early 2024. We will take Budget consultation responses into account when developing this and other final proposals to put to the Cabinet and a meeting of the Full Council for approval. The final decision will be taken by Full Council at its budget setting meeting in February / March 2024.

We will continue our regular dialogue with our trade union learning reps and staff led groups as this proposal is developed so that we continue to assess and mitigate the impact on those from equality groups.

Step 3: Who might the proposal impact?

Analysis of impacts must be rigorous. Please demonstrate your analysis of any impacts of the proposal in this section, referring to evidence you have gathered above, and the characteristics protected by the Equality Act 2010. Also include details of existing issues for particular groups that you are aware of and are seeking to address or mitigate through this proposal. See detailed guidance documents for advice on identifying potential impacts etc.

3.1 Does the proposal have any potentially adverse impacts on people based on their protected or other relevant characteristics?

Consider sub-categories (different kinds of disability, ethnic background etc.) and how people with combined characteristics (e.g. young women) might have particular needs or experience particular kinds of disadvantage.

Where mitigations indicate a follow-on action, include this in the 'Action Plan' Section 4.2 below.

GENERAL COMMENTS (highlight any potential issues that might impact all or many groups)	
<p>Even when we plan to consult in more detail on specific service delivery proposals at a later time, we must ensure that any budget setting decisions that are likely to affect future services are informed by sufficient consultation and proper analysis. This is so that decision makers can have due regard to any likely disproportionate or negative impact on the basis of their protected and other relevant characteristics at the time the budget is approved – not afterwards¹.</p> <p>Decision makers will have the ability to make changes to the individual spending plans following further consultation as appropriate and detailed evaluation of the impact of specific proposals. Within the proposed budget envelope there will be financial mitigation put aside for any non-delivery or amendments to proposals which may occur due to future consideration of equalities issues or other factors.</p> <p>As well as identifying whether budget changes will have a disproportionate impact on particular groups (e.g., because they are over-represented in a particular cohort), we need to pay particular attention to the risk of indirect discrimination: when an apparently neutral decision puts members of a given group at a particular disadvantage compared with other people because of their different needs and circumstances.</p> <p>We are also aware of existing structural inequalities and particular considerations, issues, and disparities for people in Bristol based on their characteristics, which we will take into account.</p> <p>We will mitigate the impact of this budget reduction proposal by continuing the in-house provision of equality and inclusion learning and development supplemented by external specialist provider training. This includes interactive workshops on Inclusive Leadership and Cultural Intelligence. Corporate Induction and the Team Leader Development Programme will continue to have dedicated sessions focused on equality and inclusion. The e-learning platform and offer of apprenticeships will be unaffected. We will continue to fund council staff on the Diverse Voices development programme.</p> <p>As part of the scrutiny of learning and development plans during the service planning cycle, the learning and development team will ensure that there is no disproportionate impact on any equality group from funding decisions made. They will also ensure funding is prioritised for actions related to learning and development in service Equality and Inclusion action plans.</p> <p>70% of learning is on the job and therefore unaffected by this proposal and is a significant part of learning for people in the age range where the council is most under-represented (aged 16-29). Also, apprenticeships aren't affected by this reduction in spend.</p> <p>Communication about learning and development can be targeted to boost participation levels in open courses evaluated against a framework but the measure of equity of take-up of learning is limited by the workforce demographic.</p>	
PROTECTED CHARACTERISTICS	
Age: Young People	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> Young people are under-represented in the workforce

	<ul style="list-style-type: none"> • Children and young people in Bristol are considerably more ethnically diverse than the overall population of Bristol. • Children and young people from the most deprived areas of Bristol have the poorest outcomes in health and education in terms of health, education and future employment etc. • Young adults are most likely to have lost work or seen their income drop because of COVID-19 and the cost of living crisis • This proposal could impact the availability of core skill training for staff who are in the early stages of their career.
Mitigations:	Line managers of staff will continue to work with employees on an individual basis to support development needs. We will continue to promote the in-house provision of equality and inclusion learning and development to all employees, supplemented by external specialist provider training. As part of the scrutiny of learning and development plans during the service planning cycle, the learning and development team will ensure that there is no disproportionate impact on any equality group.
Age: Older People	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • Older people in Bristol are: <ul style="list-style-type: none"> ○ less likely to be comfortable using digital services ○ more reliant on public and community transport ○ more likely to be an unpaid carer ○ more likely to help out or volunteer in their community ○ less likely to have formal qualifications • We must factor aging and the needs of older people into long term budgeting and service design • This proposal could impact the availability of skills training for staff who may need more help eg: digital skills
Mitigations:	Line managers of staff will continue to work with employees on an individual basis to support development needs. We will continue to promote the in-house provision of equality and inclusion learning and development to all employees, supplemented by external specialist provider training. As part of the scrutiny of learning and development plans during the service planning cycle, the learning and development team will ensure that there is no disproportionate impact on any equality group.
Disability	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • 9% of BCC's workforce have declared they are disabled • 17% of Bristol's population are disabled. There are more disabled women than men living in Bristol. • In 2021, the disability pay gap was 13.8% with disabled employees earning a median of £12.10 per hour and non-disabled employees a median of £14.03 per hour. • Disabled people are less likely to be employed in a managerial or professional occupation • the national disability employment rate was 52.7% in Q2 2021, compared to 81.0% for non-disabled people. • Disabled workers move out of work at nearly twice the rate (8.8%) of non-disabled workers (4.9%). Workless disabled people move into work at nearly one-third of the rate (11.0%) of workless non-disabled people (26.9%) • Disability increases with age: 4.1% of all children, for the working age population it increases to 12.3% and for people aged 65 and over it increases to 55.9%. • Disabled people on average have lower qualification levels than the population as a whole. • Budget setting needs to provide sufficient resource and flexibility to meet our legal duty to make anticipatory and responsive reasonable adjustments for disabled people including

	<ul style="list-style-type: none"> ○ changing the way things are done e.g. opening / working times; ○ changes to overcome barriers created by the physical features of premises. ○ providing auxiliary aids e.g. extra equipment or a different or additional service. ○ is 'anticipatory' so we must think in advance and ongoing about what disabled people might reasonably need. <ul style="list-style-type: none"> ● Disabled people must not be charged for their reasonable adjustments, accessible formats or other adaptations. It is a legal requirement under the Equalities Act to ensure information is accessible to disabled employees and service users. ● For the training included in the HR diversity dashboard – more disabled colleagues participate than the equivalent workforce demographic so there is a potential that this group may be impacted by a reduction in overall L&D spend.
Mitigations:	<p>Line managers of staff will continue to work with employees on an individual basis to support development needs. We will continue to promote the in-house provision of equality and inclusion learning and development to all employees, supplemented by external specialist provider training. As part of the scrutiny of learning and development plans during the service planning cycle, the learning and development team will ensure that there is no disproportionate impact on any equality group.</p>
Sex	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> ● Women are over-represented in BCC's workforce ● Men are under-represented in BCC's workforce ● The average UK pay gap is 15.4% in favour of men. The South West average is 16.6% with women paid 83p for every £1 earned by male counterparts. ● Women still bear the majority of caring responsibilities for both children and older relatives. ● Women are more likely to be excluded from conversations which affect decision making due to lack of representation in boards / organisational leadership. ● Services and workplace requirements may not take into consideration the impact of women's reproductive life course including menstruation, avoiding pregnancy, pregnancy, childbirth, breastfeeding, and menopause. ● Young women between the ages of 16 and 24 have higher risk of common mental health problems and higher rates of self-harm and post-traumatic stress disorder etc. ● Bristol female preventable mortality rates are significantly higher than the England rates ● Nationally 27% of women experience domestic abuse in their lifetimes. The rate of recorded domestic abuse incidents in Bristol has shown a significant rise over the last two years and 74% of victims were female. ● Men and boy's health is in general poorer than that of women and girl's ● Male life expectancy at birth in Bristol is around four years less than for females. ● On average men in Bristol live 18 years in poor health, women live 22 years in poor health ● A higher proportion of boys have physical impairments and more boys than girls have diagnosed mental health disorders and learning difficulties. ● Men in Bristol are more likely than women to have unhealthy lifestyle behaviours including being overweight and obese, smoking, alcohol and substance misuse ● There are differences between men and women in health practices and the way they use health services ● Men are three times more likely than women to take their own lives.

	<ul style="list-style-type: none"> Men are under-represented in take up of training opportunities included in the HR dashboard so may be impacted by a reduction in the availability of skills training.
Mitigations:	Line managers of staff will continue to work with employees on an individual basis to support development needs. We will continue to promote the in-house provision of equality and inclusion learning and development to all employees, supplemented by external specialist provider training. As part of the scrutiny of learning and development plans during the service planning cycle, the learning and development team will ensure that there is no disproportionate impact on any equality group.
Sexual orientation	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> Lesbian, gay and bisexual people are statistically more vulnerable to verbal and physical abuse 1 in 5 Lesbian, Gay, Bisexual and Trans (LGBT) staff have been the target of negative comments or conduct from work colleagues in the last year because they're LGBT. More than a third of LGBT staff have hidden or disguised that they're LGBT at work in the last year because they were afraid of discrimination. 1 in 10 Black, Asian and Minority Ethnic LGBT staff have similarly been physically attacked because of their sexual orientation and /or gender identity, compared to 3% of White LGBT staff One in four lesbian and bisexual women have experienced domestic abuse in a relationship, one third of them were abused by a man. Almost half of all gay and bisexual men have experienced at least one incident of domestic abuse from either a family member or a partner since the age of 16. Research shows LGBT people face widespread discrimination in healthcare settings and one in seven LGBT people avoid seeking healthcare for fear of discrimination from staff The Stonewall LGBT in Britain - Health Report shows LGBT people are at greater risk of marginalisation during health crises, and those with multiple marginalised identities can struggle even more. In communications we should signpost and refer where possible to mutual aid and community support networks². Research has shown that LGBT people are more likely to be living with long-term health conditions, are more likely to smoke, and have higher rates of drug and alcohol use. Half of LGBT people experienced depression in the last year 14% of LGBT people have avoided treatment for fear of discrimination because they are LGBT. Colleagues identifying as LGB have participated in more training than the workforce demographic would suggest so there is a potential that this group may be impacted by a reduction in overall L&D spend.
Mitigations:	Line managers of staff will continue to work with employees on an individual basis to support development needs. We will continue to promote the in-house provision of equality and inclusion learning and development to all employees, supplemented by external specialist provider training. As part of the scrutiny of learning and development plans during the service planning cycle, the learning and development team will ensure that there is no disproportionate impact on any equality group.
Pregnancy / Maternity	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> The Equality Act 2010 applies to those who are pregnant or have given birth in the past 26 weeks, as well as making provisions to protect the rights of breastfeeding mothers. Around 80% of women will give birth and many women will also experience termination, miscarriage and stillbirth

	<ul style="list-style-type: none"> • In the workplace we need to ensure equal access to recruitment, personal development, promotion and retention for employees who are pregnant or on maternity leave (including briefing and updates for any workforce changes) • Ensure there is equality of opportunity for services in relation to pregnancy and maternity. This includes e.g. providing physical access when using prams and pushchairs, and availability of toilets and baby-changing facilities etc. , and flexible working patterns and service times for childcare arrangements • Women from minoritised ethnic backgrounds are more likely to experience complications at birth • Those returning from maternity, shared parental or adoption leave may have missed training opportunities, but data isn't available on this through the HR dashboard
Mitigations:	Line managers of staff will continue to work with employees on an individual basis to support development needs. We will continue to promote the in-house provision of equality and inclusion learning and development to all employees, supplemented by external specialist provider training. As part of the scrutiny of learning and development plans during the service planning cycle, the learning and development team will ensure that there is no disproportionate impact on any equality group.
Gender reassignment	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • As sexual orientation above trans people are statistically more vulnerable to verbal and physical abuse. Trans people regularly face prejudice and discrimination because of the way in which they transgress many of the norms of our culture and society. • 1 in 8 trans people (12%) in the workplace have been physically attacked by customers or colleagues in the last year because they were trans • The data shows participation in training by colleagues who identify as Trans is in line with the workforce demographic so there is a potential that this group may be impacted by a reduction in overall L&D spend.
Mitigations:	Line managers of staff will continue to work with employees on an individual basis to support development needs. We will continue to promote the in-house provision of equality and inclusion learning and development to all employees, supplemented by external specialist provider training. As part of the scrutiny of learning and development plans during the service planning cycle, the learning and development team will ensure that there is no disproportionate impact on any equality group.
Race	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • Ethnic minorities in Bristol experience greater disadvantage than in England and Wales as a whole in education and employment and this is particularly so for Black African people². • In the last census (2011) 16% of the population belonged to a Black, Asian or minority ethnic group and this is likely to be higher now. • The top three countries of birth outside UK for Bristol residents are Poland, Somalia and India. • Although the race or ethnicity pay gap has narrowed in recent years there are still wide pay differences between particular ethnic groups and most minority ethnic groups earn less on average than White British people. • Bangladeshi, Pakistani, and Black ethnic groups are more likely to live in deprived neighbourhoods; and the same groups and Chinese ethnicities are about twice as likely to live on a low income and experience child poverty compared to White groups • Black, Asian and minoritised ethnic households are less likely to own their home and more likely to living in overcrowded housing and intergenerational households. Bangladeshi and Pakistani groups are more likely to live in multi-family households.

	<ul style="list-style-type: none"> • Black people in the UK are less likely to hold a driving licence and more likely to rely on public transport. • Black, Asian and minority ethnic groups in Bristol are more likely to find inaccessible public transport prevents them from leaving their home when they want to • Black African young people are disadvantaged in education compared to their White peers⁸. A disproportionately high percentage of Bristol school pupils from Black, Asian and minority ethnic backgrounds are excluded from school and In Bristol pupils with the lowest 'Attainment 8' scores are from Black ethnic background (highest from Chinese ethnic background.) • Organisations may lack cultural competence because minoritised ethnic staff are under- represented. • People from Black African, Other, and Black Caribbean groups have persistently high levels of unemployment and almost all ethnic minority groups in Bristol experience employment inequality when compared to White British people. • Black Asian and other minoritised ethnic groups are more likely to be self-employed than the Bristol average and over-represented in low income self-employment including taxis, takeaway restaurants • People from minoritised ethnic backgrounds are underrepresented in political and civic leadership. • People who do not speak English as a main language may require information in plain English and community language translations or videos etc. • The data shows participation in training by racially minoritised colleagues is in line with the workforce demographic so there is a potential that this group may be impacted by a reduction in overall L&D spend.
Mitigations:	Line managers of staff will continue to work with employees on an individual basis to support development needs. We will continue to promote the in-house provision of equality and inclusion learning and development to all employees, supplemented by external specialist provider training. As part of the scrutiny of learning and development plans during the service planning cycle, the learning and development team will ensure that there is no disproportionate impact on any equality group.
Religion or Belief	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • There are at least 45 religions represented in Bristol. Approximately 1 in 20 people in Bristol are Muslim, and Islam is the second religion in Bristol after Christianity • Budget proposals should take into account differing needs because of people's religion and belief (for example different requirements around diet, life events, and holidays) • Having a designated multi-faith room can make environments such as workplaces and shopping centres is more accessible and friendly for people from faith groups where regular prayer is required.
Mitigations:	Line managers of staff will continue to work with employees on an individual basis to support development needs. We will continue to promote the in-house provision of equality and inclusion learning and development to all employees, supplemented by external specialist provider training. As part of the scrutiny of learning and development plans during the service planning cycle, the learning and development team will ensure that there is no disproportionate impact on any equality group.
Marriage & civil partnership	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	
Mitigations:	
OTHER RELEVANT CHARACTERISTICS	

Socio-Economic (deprivation)	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • Bristol has 41 areas in the most deprived 10% in England, including 3 in the most deprived 1%. The greatest levels of deprivation are in Hartcliffe & Withywood, Filwood and Lawrence Hill. • In Bristol 15% of residents - 70,800 people - live in the 10% most deprived areas in England, including 19,000 children and 7,800 older people. • There are an estimated 29,045 households living in fuel poverty in Bristol, 14.4% of all households (BEIS, 2022) • 4.6% of households have experienced moderate to severe food insecurity, rising to 11.2% in the most deprived areas of the city (QoL 2021-22) • 34.6% of people in Bristol are dissatisfied with the way the Council runs things, but this is 47.5% for people living in the most deprived areas of the city (QoL 2021-22). • The inequalities gap in life expectancy between the most and least deprived areas in Bristol is 9.9 years for men and 6.7 years for women.
Mitigations:	Line managers of staff will continue to work with employees on an individual basis to support development needs. We will continue to promote the in-house provision of equality and inclusion learning and development to all employees, supplemented by external specialist provider training. As part of the scrutiny of learning and development plans during the service planning cycle, the learning and development team will ensure that there is no disproportionate impact on any equality group.
Carers	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<ul style="list-style-type: none"> • Being a carer can be a huge barrier to accessing services and maintaining employment • We need to consider the timing/availability of services, events etc. to allow flexibility for carers. • As with Disability and Pregnancy and Maternity – policies which aim to restrict driving or parking can have a disproportionate impact on people who are reliant on having their own transport. • Studies show around 65% of adults have provided unpaid care for a loved one. • Women have a 50% likelihood of being an unpaid carer by the age of 46 (by age 57 for men) • Young carers are often hidden and may not recognise themselves as carers_
Mitigations:	Line managers of staff will continue to work with employees on an individual basis to support development needs. We will continue to promote the in-house provision of equality and inclusion learning and development to all employees, supplemented by external specialist provider training. As part of the scrutiny of learning and development plans during the service planning cycle, the learning and development team will ensure that there is no disproportionate impact on any equality group.
Other groups [Please add additional rows below to detail the impact for other relevant groups as appropriate e.g. Asylums and Refugees; Looked after Children / Care Leavers; Homelessness]	
Potential impacts:	
Mitigations:	

3.2 Does the proposal create any benefits for people based on their protected or other relevant characteristics?

Outline any potential benefits of the proposal and how they can be maximised. Identify how the proposal will support our [Public Sector Equality Duty](#) to:

- ✓ Eliminate unlawful discrimination for a protected group
- ✓ Advance equality of opportunity between people with a protected characteristic and those who don't

- ✓ Foster good relations between people who share a protected characteristic and those who don't

The scale of the potential gap in our core funding means that there is very limited opportunity to bring genuine additional benefit to equalities groups in the circumstances. However we have considered as far as possible the need to: eliminate discrimination, harassment, victimisation and any other conduct prohibited under the Equality Act 2010; advance equality of opportunity between people from different groups; and foster good relations between people from different groups.

Our budget savings proposals are aligned to our Corporate Strategy and although we have limited resources our future focus will be on achieving those priorities we have identified including tackling poverty and intergenerational inequality.

Step 4: Impact

4.1 How has the equality impact assessment informed or changed the proposal?

What are the main conclusions of this assessment? Use this section to provide an overview of your findings. This summary can be included in decision pathway reports etc.

If you have identified any significant negative impacts which cannot be mitigated, provide a justification showing how the proposal is proportionate, necessary, and appropriate despite this.

Summary of significant negative impacts and how they can be mitigated or justified:

There is likely to be some impact on those with particular protected characteristics with a reduction in discretionary spend on core skills training or continuous professional development.

We will mitigate the impact of this budget reduction by continuing the in-house provision of equality and inclusion learning and development supplemented by external specialist provider training. This includes interactive workshops on Inclusive Leadership and Cultural Intelligence. Corporate Induction and the Team Leader Development Programme will continue to have dedicated sessions focused on equality and inclusion. The e-learning platform and offer of apprenticeships will be unaffected. We will continue to fund council staff on the Diverse Voices development programme.

As part of the scrutiny of learning and development plans during the service planning cycle, the learning and development team will ensure that there is no disproportionate impact on any equality group from funding decisions made. They will also ensure funding is prioritised for actions related to learning and development in service Equality and Inclusion action plans.

70% of learning is on the job and therefore unaffected by this proposal and is a significant part of learning for people in the age range where the council is most under-represented (aged 16-29). Also, apprenticeships aren't affected by this reduction in spend.

Communication about learning and development can be targeted to boost participation levels in open courses evaluated against a framework but the measure of equity of take-up of learning is limited by the workforce demographic.

Summary of positive impacts / opportunities to promote the Public Sector Equality Duty:

None identified

4.2 Action Plan

Use this section to set out any actions you have identified to improve data, mitigate issues, or maximise opportunities etc. If an action is to meet the needs of a particular protected group please specify this.

Improvement / action required	Responsible Officer	Timescale
All relevant EqlAs will be published on the Council’s website https://www.bristol.gov.uk/council-spending-performance/council-budgets and continue to be updated as appropriate.	Steph Griffin	Dec 2023
Ensure learning and development plans are reviewed for potential impact on equality groups with mitigation action	Steph Griffin	April 2024

4.3 How will the impact of your proposal and actions be measured?

How will you know if you have been successful? Once the activity has been implemented this equality impact assessment should be periodically reviewed to make sure your changes have been effective your approach is still appropriate.

Our Equality and Inclusion Annual Progress Reports show what we have done to achieve the aims of our Equality and Inclusion policy and strategy, and the progress we have made including reporting on all relevant KPIs and workforce diversity [Equalities policy - bristol.gov.uk](https://www.bristol.gov.uk/equalities-policy)

We will monitor the impact through our HR diversity dashboard, our Training by Diversity dashboard and feedback through the L&D programmes themselves and the annual staff survey – with a question specifically about access to learning and development opportunities.

The Equality and Inclusion Team need at least five working days to comment and feedback on your EqlA. EqlAs should only be marked as reviewed when they provide sufficient information for decision-makers on the equalities impact of the proposal. Please seek feedback and review from the [Equality and Inclusion Team](#) before requesting sign off from your Director¹.

Equality and Inclusion Team Review: Reviewed by the Equality and Inclusion Team	Director Sign-Off: Steph Griffin
Date: 08/01/2023	22 December 23

¹ Review by the Equality and Inclusion Team confirms there is sufficient analysis for decision makers to consider the likely equality impacts at this stage. This is not an endorsement or approval of the proposal.