

Equality Impact Assessment [version 2.12]



Title: Medium Term Financial Strategy and Capital Strategy 2025-26	
<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: Cross-BCC	Lead Officer name: Tony Kirkham
Service Area: Cross-BCC	Lead Officer role: 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.

The Medium Term Financial Strategy and Capital Strategy are integrated key parts of the Council’s financial planning process. They set out the Council’s strategic approach to the management of its finances and provide a framework within which delivery of the Council’s priorities will be progressed.

The refresh of the Medium Term Financial Strategy considers the financial outlook for the Council over the next five years 2025/26 – 2029/30, taking into account national and local changes which may impact on the Council, ongoing financial uncertainty associated to cost of living crisis and local government funding, delays to funding reforms, savings measures agreed in the past year and not delivered, emerging demands, pressures and opportunities.

The Capital Strategy 2025/26 – 2034/35 details the high-level approach and framework that will underpin the development of the Capital Programme. It sets out the governance framework required to ensure that the Capital Programme can be delivered and, in a balanced way, it supports the delivery of the Council’s objectives in spite of key issues and risks that may impact on the delivery of the programme. It supports the principle that capital investment remains sustainable and affordable.

The reports have been prepared in compliance with the relevant codes and in developing the financial outlook various assumptions have been made. These are modelling / planning assumptions which will be kept under constant review given the increased level of uncertainty in the financial and economic climate. At the point at which specific service or project proposals are made regarding these assumptions, a full equalities impact will be undertaken.

The Council is required by law to set a balanced budget and even before the cost of living crisis, finding solutions to balance the Council’s annual budget was becoming ever more challenging, particularly while seeking to manage the impact on those with the greatest need for our support.

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 type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	[please select]
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We have not identified any significant equality impact from the Medium Term Financial Strategy and Capital Strategy at this stage. This is because the MTFP and Capital Strategy report is intended to provide context for activities which may be initiated in response to the indicative funding gap identified at this time. There are no final decisions at this time and any future individual proposals will be subject to their own separate Equality Impact Assessment, consultation (if required) at the relevant time; and because decision makers will have the ability to make changes to the individual spending plans following consultation (where necessary) and detailed evaluation of the impact of proposals.

The Medium Term Financial Strategy and Capital Strategy will form the financial framework and set the parameters for the overall budget envelope (the monies available) for the Council, which will enable capital borrowing for investments and the delivery of the Council's priorities. They are set against the uncertain backdrop of local government financing, climate and ecological emergency, economic recovery, cost of living crisis, increase in demand for already hard-pressed services such as adult and children's services and High Needs.

However, the impact of the Council budget proposals cannot be seen in isolation. The challenging economic climate is also likely to impact on some groups on the basis of their protected and other relevant characteristics and add to the cumulative impact of Council proposals.

We are conscious of the impact of price and Council Tax increases on Bristol residents and that this provides a difficult balancing act between income generation and reductions in valued services.

The final position will be decided as part of the annual budget setting process and will be subject to a specific equalities impact assessment at that point.

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 Equality and Inclusion Team</i>	Director Sign-Off: <i>Tony Kirkham S151</i>
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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: 24 September 2024

Date: 26 September 2024