

Equality Impact Assessment – Screening

Decision/Policy/Service/Function

Fees and Charges Policy 2023-24 – Westmorland and Furness Unitary Authority

Background and summary of Equality Advice

The Council's Fees and Charges Schedules are approved annually as part of the budget setting process.

Harmonisation

Westmorland and Furness Shadow Authority agreed, in November 2022, a principles paper setting out the harmonisation proposals for the three sovereign district councils.

Inflationary Uplift

Where fees and charges are discretionary then a proposed 10% inflationary uplift will be applied unless there is a clear reason or obligation to apply a different increase. This uplift will be to the fees that have been harmonised or to the 2022/23 sovereign fee where there has been no harmonisation.

Proposals to change the decision/policy/service/function

The proposals are outlined in the Fees and Charges Policy 2023-24 at Appendix C of the Cabinet Paper

Feedback from Members and Officers during the consultation stage has been considered. Where exceptions to the proposals have been identified due to service requirements or impact on customers, adjustments have been made to the fees and charges schedules, including the continuation of appropriate concessions and differences to inflationary uplifts.

Consultation

Who	What
Legal Services	Advice on the legal requirements in terms of what fees and charges must or may not be harmonised from Day 1.
<ul style="list-style-type: none"> • Interim Section 151 Officer • Interim Head of Paid Service • Interim Monitoring Officer • Shadow Cabinet Members 	Consultation on the Fees and Charges Principles paper (11 November 2022)
<ul style="list-style-type: none"> • Interim Section 151 Officer • Shadow Cabinet Members 	Consultation on categories requiring member decisions.

<ul style="list-style-type: none"> • Interim Section 151 Officer • Shadow Cabinet Members • LGR Work Package leads and disseminated to relevant officers across all authorities • LGR Project Managers • Lead Finance Officers from Barrow, Eden and South Lakes Councils 	<p>Consultation on the proposed harmonisation and inflationary uplift</p>
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Equality screening

Equality characteristic	Impact Y/N	Describe Impact (if Yes)	Measures to address impact (if Yes)	Full EqIA needed Y/N
General	Unknown	Due to changes in service delivery following vesting day and move to the new unitary authorities, impacts may be unknown at present.	The Fees and Charges Policy includes the following measures: <ul style="list-style-type: none"> • Section 6.6 – The Budget Report where the annual charges are agreed, will seek to delegate authority to approve any amendments (from the levels set within the Budget Report), up to a maximum of a 10% increase/decrease for any individual fee or a maximum of £50 increase/decrease, to the Section 151 Officer. Any proposed changes outside of these thresholds should be approved by Executive. In year revised charges should be reviewed in the next budget planning cycle. • Section 6.7 - Consideration should be given, and advice sought where required, in relation to the need for an Equality Impact Assessment for any significant changes to existing fees and charges or the introduction of new fees and charges. 	Yes – It is recommended that a Full EqIA is carried out after 6 months to inform future budgets and the Mid-Term Financial Plan. This should review data on protected characteristic of service users, take up of concessions and complaints. Consideration should be given to how information on new fees and charges can be communicated to households and businesses in different formats. This should include how to access concessions or welfare support and
	Yes – neutral	Impacts of harmonisation - Households may pay more or less than prior to 1 April 2023, depending on how fees and charges have been harmonised.		
	Yes – negative	General impact of 10% inflationary increase on fees and charges, increasing costs on households. The government is increasing benefits by 10.1% in line with inflation, measured by the September (CPI) Consumer Price Index ¹ , however specific groups are more likely to be affected by increases in the		

¹ [Autumn Statement 2022 HTML - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/statements/autumn-statement-2022)

		<p>costs of living². These include:</p> <ul style="list-style-type: none"> • Adults on the lowest incomes, those renting their homes or those with no formal qualifications. • Parents of dependent children, adults who are divorced or separated, and disabled adults. • Additional group to be considered include care leavers and armed forces veterans (with regard to the Council's Armed Forces Duty). 	<ul style="list-style-type: none"> • Section 7.7 - It is recommended that where service transformation is undertaken following Day 1, that an Equality Impact Assessment is developed as part of this process, including the review of any changes to fees and charges. • Section 8.2 - Reasonable notice should be given to service users before any new charge is implemented, together with clear advice on discounts or concessions available. • Section 9.0 - Considerations for establishing or reviewing the level of discounts and concessions offered. • Section 12.0 - Recording of Fees and Charges supports the monitoring and evaluation of use to inform fees and charges reviews, and what measures can be introduced to address any impacts. 	<p>advice if negatively impacted.</p>
Age	See General			
Disability	See General			
Gender reassignment	See General			
Marriage or civil partnership	See General			
Pregnancy or maternity	See General			
Race	See General			
Religion or belief	See General			

² [Impact of increased cost of living on adults across Great Britain - Office for National Statistics \(ons.gov.uk\)](https://ons.gov.uk)

Sex	See General			
Sexual orientation	See General			
Transgender	See General			
Care Expenience	See General			
Rurality	See General			
Socio- economic status	See General			
Armed-forces personnel/ veterans	See General			

Equality Impact Assessment – Screening

Decision/Policy/Service/Function

Council Tax Harmonisation and annual Council Tax increase

Background and summary of Equality Advice

As part of the annual budget setting process and in line with Government funding assumptions, Westmorland and Furness Council are proposing to harmonise the Council Tax across all sovereign councils and apply a 2.99% general increase in Council Tax and a 2% Adult Social Care precept for 2023/24.

This will ensure that the Council is able to continue to support the most vulnerable in our communities and provide the services everyone in the community uses.

Proposals to change the decision/policy/service/function

Not applicable

Consultation

A Public Consultation was launched on 13 January 2023 and closed on 13 February 2023.

Equality screening

Equality characteristic	Impact Y/N	Describe Impact (if Yes)	Measures to address impact (if Yes)	Full EqIA needed Y/N
General	Y	All Council Taxpayers will see an increase to their annual Council Tax bill. Possible impact if the individual is unable to pay the increased Council Tax or there is financial hardship	There is a Council Tax Reduction Scheme to support those with lower income. Should individuals not qualify for this support, Ways to Welfare (Household Support Fund) is available for all to access at least until 31 March 2024	N
Age	Y	There is a possible impact of the increase on younger persons and pensioners who could be on low incomes	There is a Council Tax Reduction Scheme to support those with lower income.	N

Equality characteristic	Impact Y/N	Describe Impact (if Yes)	Measures to address impact (if Yes)	Full EqIA needed Y/N
			<p>There is Single Person Discount available for those that a living alone</p> <p>Should individuals not qualify for this support, the Household Support Fund is available for all to access at least until 31 March 2024`</p>	
Disability	Y	There is the potential that those with disabilities are unable to pay the increased Council Tax or there is financial hardship.	<p>Council Tax Reduction Scheme Scheme to support those on lower income</p> <p>Council Tax information should be available in all formats including all electronic versions which should work with all electronic devices and screen readers.</p> <p>Ensure that the Council is ready to respond to requests for the information in different formats</p>	N
Gender reassignment	See General above			N
Marriage or civil partnership	See General above			N
Pregnancy or maternity	See General above			N
Race	Y	There is the potential for those of different ethnicities to be impacted and they are unable to pay the increased Council Tax or there is financial hardship.	<p>Council Tax Reduction Scheme Scheme to support those on lower income</p> <p>Council Tax and Council Tax Reduction Scheme information should be accessible in the key languages spoken in Westmorland and Furness area.</p>	N

Equality characteristic	Impact Y/N	Describe Impact (if Yes)	Measures to address impact (if Yes)	Full EqIA needed Y/N
			Ensure support is available to refugees who are moving away from state support. To ensure that they understand the legal requirements of Council Tax and that they understand their entitlements to support.	
Religion or belief	See General above			N
Sex	See General above			N
Sexual orientation	See General above			N
Care Experience	Y	There is the potential for those with care experience are unable to pay the increased Council Tax or there is financial hardship	<p>There is a Council Tax Reduction Scheme to support those with lower income.</p> <p>The Council has adopted the Cumbria-wide Care Leavers Policy which provides Care Leavers with discounts up to their 25th birthday: These are</p> <ul style="list-style-type: none"> • Care leavers who are solely liable to pay Council Tax in their own right have their bill reduced to nil; • Care leavers who are jointly liable to pay Council tax have the bill reduced in proportion 50% (if 2 adults), 33% (3 adults), 25% (4 adults); • There is no discount where the care leaver is not liable to pay Council Tax, except where the care leaver lives in a household where the liable person would be exempt if the care leaver 	N

Equality characteristic	Impact Y/N	Describe Impact (if Yes)	Measures to address impact (if Yes)	Full EqIA needed Y/N
			<p>did not reside with them. In this case full discretionary discount will be applied.</p> <p>Discounts are available for care leavers.</p> <p>Single Occupancy Discount is available for when a care leaver is living alone.</p>	
Rurality	See General above			N
Socio-economic status	Y	There is the potential due to the Cost of Living crisis that householders choose not to pay their Council Tax and prioritise other household expenditure	<p>Information should be made available in relation to legal requirement to pay Council Tax. It should clearly indicate that Council Tax is categorised as a priority debt.</p> <p>The Council also works with Citizens Advice and other agencies to help people struggling with priority and non-priority debt.</p>	N
Armed-forces personnel/ veterans	See General above		The Council has adopted the Armed Services Covenant	N

EQUALITY IMPACT ASSESSMENT SCREENING FORM

This form should be used when a strategy/policy/procedure/process/project (SPPPP) has been identified as minimal/low impact.

This may be due to the fact that the overall SPPPP in an area of operation has already been fully Equality Impact Assessed (EIA).

It may also be due to the type of SPPPP and because it has mainstreamed equality, diversity and inclusion.

Title of the SPPPP being assessed	Housing Revenue Account Budget 2023/24 report.	Lead Officer	Rebecca Halton Head of Business Support, People & Place Directorate.
Aims of the SPPPP being assessed	To agree a Housing Revenue Account Budget.	Staff carrying out the EIA screening	Chris Root – External E&D Critical Friend completed this EIA screening.
Date of EIA screening	16th February 2023.	Why is the document being screened?	Part of on-going EIA timetable.
Date for next EIA	2024.	Was this screening process taken as an opportunity to update language and wording of policy?	YES.

This EIA screening process is undertaken by a group of staff and on occasion an internal or external equality and diversity champion/critical friend, considering and discussing the Equality Act 2010 and its Protected Characteristics including: Race, Sex, Gender Reassignment, Disability, Sexual Orientation, Religion or Belief, Marriage or Civil Partner, Age and Pregnancy and Maternity explicitly.

THE EIA SCREENING OUTCOMES AND ACTIONS:

<p>Have actions arisen from the screening process</p>	<p>YES.</p>
	<p>This report will be in line with equality legislation and Westmorland and Furness Council’s equality, diversity and inclusion commitment and requirements if the following are considered:</p> <ol style="list-style-type: none"> 1. The fact that the social rent increase proposed is only for 3.5% will go some way to support the most vulnerable and those with economic hardship. 2. Adelphi Court - Although the proposed increase in rent is 3.5% and not until 1st June 2023, particular attention should be given to the impact on those tenants with a disability or are financially vulnerable. Although Adelphi Court is leased to Richmond Fellowship, some support may be needed though the Council in cases of particular hardship. <i>Richmond Fellowship have on-premises support staff to mitigate any negative financial impact through advice and support, the impact should be minimal due to the benefit covering the increase.</i> 3. Housing Management System - Tenants Hub - The action of developing, testing and implementing the Tenants Hub should be thoroughly equality Impact assessed and a pilot should be developed with vulnerable tenants and those with a variety of disabilities to make sure it is fully accessible. <i>The Council will ensure the Hub is piloted and tested vigorously before being launched to include a range of tenants.</i> 4. The assessment indicated no adverse impact on any of the nine protected characteristics of the Equality Act 2010, however there is some concern that there may be some impact on particular vulnerable individuals and communities who are not identified as having a protected characteristic.