

## **Appendix D - Evaluating the Potential Impact of the 2025-26 Budget**

### **Introduction**

This report outlines the results of the impact assessment undertaken alongside the individual budget proposals for the financial year 2025-26. The assessment has two aims:

- to help assess the overall potential impact of the budget on different groups of people within our communities and,
- to identify actions that mitigate against or reduce the potential negative effects of our proposals on vulnerable people and households on the lowest incomes.

The spending proposals for the next financial year – 2025/2026 are informed by the principles set in our Medium-Term Financial Strategy. These include: A citizen facing budget focused on equality and climate change; maintaining reserves of at least 5% of our net revenue budget and only borrowing where it is affordable and sustainable to do so.

Spending on front-line service delivery will rise next year, with double-digit increases in education and social care. Despite this, the growth in the Council's budget will not be enough to keep pace with increasing demand and more complex needs. While inflation has come down, prices are still a lot higher than they were a few years ago. As a result, we are still having to pay more for items such energy and fuel. Our budget is being set within the context of a sustained period of under-investment in public services which means that the base line for this budget process is not ideal.

We have had to take some difficult decisions. These will impact residents in different ways. We recognise, for example, that a reduction in social care could be felt more acutely by older people and disabled people. Increased charges for services, such as leisure centre admissions, will be more of an issue for those on lower incomes. This does not just mean those who are unemployed. People who experience in-work poverty, disabled people or those with protected characteristics may also be affected.

We recognise that there is a correlation between some protected characteristics and an increased risk of poverty. Intersectionality plays a large role; the more protected characteristics a person has, the more likely they are to experience financial hardship.

The development of this impact assessment has been an iterative process and has been developed alongside the budget proposals with further refinement undertaken following the public consultation. This means that we have been able to understand the potential impacts and adjust our thinking. As a result, we have been able to amend some proposals or introduce mitigating actions to lessen the impact of some of the difficult decisions we are faced with, on the most vulnerable in our communities.

We assessed the impact of our proposals through:

- Part 1 - An overall Integrated Impact Assessment which summarises the effects of all budget proposals which could alter a service or the way that service is delivered. This assesses its potential impact on the national well-being goals and the ways of working enshrined in the Well-being of Future Generations Act and the people and groups who possess the protected characteristics specified under the Equality Act 2010.

- Part 2 - A review of the potential cumulative financial impact on households with different income levels. This helps us particularly understand the potential impact on those experiencing socio-economic disadvantage, in line with the socio-economic duty in Wales.

Many of the proposals have their own stand-alone impact assessments. These have been developed and considered by Cabinet as proposals have been developed. Ongoing feedback has been used to refine the options being put forward for public consultation. We recognise that people are the experts in their own lives and this consultation could result in additional issues being identified which will further enhance the impact assessment.

Open and robust scrutiny and challenge has been an essential part of the budget setting process. Cabinet have listened to feedback during public consultation and engagement that was undertaken for a four-week period between January and February 2025. As a result, the proposal to change the opening hours at four community hubs will not be taken forward. The consultation process highlighted the importance and value placed on these facilities within our communities and also highlighted the ancillary impact these changes may have on the wider provision of Council services.

You can read more about the legal basis for this work and the underpinning methodology in the appendices.

## Part 1: Overall Integrated Impact Assessment

This provides an overview of the impact, both positive and negative, of the budget proposals and the mitigating actions we have identified to reduce the effects on vulnerable groups and those with protected characteristics. These mitigations were developed in line with the principles guiding the budget setting process.

The assessment identifies areas where there is a risk that changes resulting from individual budget proposals may have a significantly greater impact on particular groups when looked at together with other proposals. By doing this, we can identify where we may need to mitigate against negative impacts on certain groups of people. Mitigating actions could include re-shaping services to target them more efficiently at certain groups or communities to reduce the potential of disproportionate impacts on groups with protected characteristics as defined by the Equality Act 2010.

This is the same tool that accompanies specific individual budget proposals. It does not highlight every single issue but reveals some of the key impacts of budget proposals and provides scope for continual learning and improvement as proposals are developed. Further details of the assessed impacts of individual proposals are provided in the full budget papers.



## Integrated Impact Assessment document (Incorporating Equalities, Future Generations, Welsh Language and Socio-Economic Duty)

<b>Name of the Officer:</b> Richard Jones  <b>Phone no:</b> 01633 740733 <b>E-mail:</b> richardjones@monmouthshire.gov.uk	<b>Please give a brief description of the aims of the proposal:</b> To deliver a balanced budget while continuing to make progress against the council's longer term aims.
<b>Name of Service area:</b> Chief Executive's	<b>Date:</b> 22/02/25 (version 2.0)

**1. Are your proposals going to affect any people or groups of people with protected characteristics?** Please explain the impact, the evidence you have used and any action you are taking below.

<b>Protected Characteristics</b>	<b>Describe any positive impacts your proposal has on the protected characteristic</b>	<b>Describe any negative impacts your proposal has on the protected characteristic</b>	<b>What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?</b>
Age	<p>Local authorities provide universal services such as highways and waste collections which bring benefits to all age groups. However, many of our services such as education and social care are delivered to proportionately higher numbers of younger and older people and as a result these groups are more likely to experience the effects of any changes to services resulting from the budget.</p> <p>The commitment to providing additional funding to support pupils with complex and highly complex Additional Learning Needs (ALN) (CYP P1 &amp; CYP P4) will help ensure that children and young people with complex ALN are provided with appropriate provision to meet their identified needs.</p> <p>The proposal to bring ALN pupils who are currently in maintained and independent specialist placements outside of Monmouthshire back into Council provision at key points of transition (SCYP 4) will support more pupils within their</p>	<p>A small reduction of 0.6 FTE in the workforce in the Monmouthshire specialist teacher team (CYP S1) could have a negative impact on the support received by children and young people.</p> <p>Concessionary home to school transport is a discretionary service over and above that provided to pupils who meet the statutory criteria or have additional learning needs. Neither of these are affected by this budget. Reducing the subsidy provided for concessionary home to school transport (C&amp;P 22) may mean that some children from low-income families will no longer be able to afford the service. It will continue to be subsidised below market levels.</p> <p>The lack of placement choice and availability within Monmouthshire is having an adverse effect on children requiring social care support. Changes to practice in social care (SCH 7) seek to support children and young people who are looked after, or care experienced, to live closer to home and to be</p>	<p>Families will have the option to pay the cost of home to school transport across the academic year (C&amp;P 22).</p> <p>Individual care planning for children is in place. This takes into account their individual needs and personal outcomes in line with their stage of development. (SCH 7)</p>

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	<p>local community which should have a positive effect on their well-being.</p> <p>Monmouthshire is a rural county and the costs of home to school transport is rising. Providing additional funding to meet the increased costs (C&amp;P 3) will ensure that this service can be maintained and children can continue to be provided with transport to school.</p> <p>Monmouthshire has an ageing population. Providing additional money to meet funding pressures in Adult and Children's Social Care resulting from higher demand and more complex cases (SCHP1 &amp; SCHP4), will ensure that both children and young people and older people in receipt of care continue to be supported, helping them to live independently, access vital services, improve their quality of life and maintain close relationships with family and friends.</p> <p>Providing additional funding to uplift social care provider fees (SCH P5) will increase the likelihood that independent care providers can continue to operate in</p>	<p>appropriately supported to develop their independence.</p> <p>Older people, particularly those with care and support needs, and their carers are more likely to be negatively affected by proposed practice change in Adult Social Care (SCH 3). There will be a renewed focus on assessment and review of care and support needs of individuals as part of the proposal to ensure that the impact on individuals is fully understood and considered.</p> <p>This includes a reduction in the workforce within direct care (SCH10). Existing vacancies in home care teams are being held vacant to minimise the impact on the current workforce. A reduced workforce within direct care will have an impact on older / frail adults with care and support needs and their carers. Often older adults are being supported to remain at home with the support of family members who can themselves be of older age.</p> <p>The charge service users pay for Monmouthshire Meals (sometimes known as 'Meals on Wheels') will increase. The service is currently used by 247 people. This could affect users, who are those with an assessed care need, and affect older frail adults and their</p>	<p>There will be a renewed focus on assessment and review of care and support needs for adults requiring social care support. A focus on reablement approaches allows people to maximise their independence that is in line with the requirements of the Social Services and Well Being Act (SCH 3).</p> <p>Existing vacancies within home care teams will be held to minimise impact on the workforce (SCH10).</p> <p>We will ensure the Social Services and Well-being Act charging legislation is adhered to. This ensures that service users are means tested to determine their ability to pay.</p> <p>Increased demand, the fragility of the social care sector and the availability of care staff remain a key risk for Adult Social Care which needs to be considered as part of budget proposals.</p>

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	<p>our area, helping the council to secure care for vulnerable people.</p> <p>Increasing funding to increase the fees and allowances paid to foster carers (SCH P6) will aid the council's aim of increasing the number of local authority foster carers in the county. This will mean that fewer children are placed in private placements or residential children's homes which can often be far from their familiar community and more costly than in-house provision.</p> <p>The proposal to charge an annual membership of the Grass Routes demand responsive transport scheme (C&amp;P8) will provide vital revenue to help ensure the continued operation of the service providing transport to residents who require it.</p>	<p>cares. Some people may choose to stop receiving the service. However, there are private providers of community meals type services in the county which could potentially mitigate this effect for some users. We recognise that private providers may not deliver to all geographical areas exacerbating issues of geographical inequality.</p> <p>The proposed charge for the Grass Routes membership scheme (C&amp;P8), an annual £10 fee, will result in a small increased cost for scheme members to use the service. Currently the service is used by 250 people, predominantly concessionary bus pass holders. The significant majority of service users are aged 65 or over. Those who do not wish to join the scheme will be able to access public transport services, albeit they will be less flexible than the subsidised demand-responsive service they currently receive.</p> <p>A reduction in the Youth Service budget, and service provision means overall, there would be less youth work taking place across Monmouthshire (MLS4). This may be felt across all protected characteristics but particularly younger people. National research shows that youth clubs are successful</p>	<p>Current and potential users of Grass Routes transport who do not wish to join the scheme will be able to access public transport services, albeit they will be less flexible than the service they currently receive.</p> <p>The initial proposal to reduce Community Hub opening hours was removed following public consultation. These services will remain open. This will protect face-to-face counter service in our largest towns, something that is valued by many people as hubs provide a vital safety net for vulnerable people alongside the provision of universal services for the whole community.</p> <p>The main youth centres, based in the four largest towns, will not be affected (MLS 4). If there is any reduction in youth club provision, the young people will be signposted to one of the four youth centres, in addition to other opportunities in their community.</p>

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		<p>at reaching the most vulnerable, for example, those directly affected by violence are twice as likely to regularly go to a youth club. However, it is likely that many others, sometimes referred to as the 'missing middle' will be affected by reductions in open access youth services.</p>	<p>Where any savings result in compulsory redundancies the process will make a determination in an unbiased and un predetermined way and with due regard for the impact relating to protected characteristics.</p>
Disability	<p>Many of our services, such as social care, are delivered to proportionately higher numbers of disabled people.</p> <p>Providing additional funding to support pupils with complex and highly complex Additional Learning Needs (ALN) (CYP P1 &amp; CYP P4) will help ensure that children and young people with complex ALN are provided with appropriate provision to meet their identified needs.</p> <p>The proposal to bring ALN pupils currently educated in maintained and independent specialist placements outside Monmouthshire back into Council provision at key points of transition (SCYP 4) will enable us to support more pupils within their local community.</p> <p>Providing additional money to meet funding pressures in Adult and Children's Social Care (SCHP1 &amp; SCHP4) will allow</p>	<p>A small reduction of 0.6 FTE in the workforce in the Monmouthshire specialist teacher team (CYP S1) could have a negative impact on the support received by children and young people.</p> <p>Children with more complex needs and disabilities are disproportionately impacted by the lack of suitable placements in Monmouthshire for children requiring social care support. Changing practice in Social Care (SCH 7) seeks to address this through the development of bespoke services and provision which will reduce the reliance on 'for profit' and out-of-county placements.</p> <p>Adults with physical disabilities, and adults with mental health difficulties including dementia, may be negatively impacted by proposed practice changes in Adult Social Care (SCH 3). There will be a renewed focus on the</p>	<p>Individual care planning for children is in place which takes into account their individual needs and personal outcomes in line with their stage of development. (SCH 7)</p> <p>There will be a renewed focus on the assessment and review of care and support needs for adults requiring social care support. A focus on reablement approaches allows people to maximise</p>

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	<p>those experiencing physical and learning disabilities as well as ill-health, both mental and physical, to continue to receive support, to live independently and access vital services.</p> <p>Putting in place additional funds to uplift social care provider fees (SCH P5) will increase the likelihood that independent care providers can continue to operate in our area, helping the council to secure care for vulnerable people.</p>	<p>assessment and review of care and support needs of individuals as part of the proposal.</p> <p>As highlighted in the age category, the charge service users pay for Monmouthshire Meals will increase. The service is currently used by 247 people. This would affect users of the service, including disabled people and their carers. Some people may choose to stop receiving the service. As highlighted in the age category of this assessment we recognise that private providers may not deliver to all geographical areas exacerbating issues of geographical inequality in alternative service provision.</p>	<p>their independence that is in line with the requirements of the Social Services and Well Being Act (SCH 3).</p> <p>We will ensure the Social Services and Well-being Act charging legislation is adhered to. This ensures that service users are means tested to determine their ability to pay.</p> <p>Increased demand, the fragility of the social care sector and challenges recruiting care staff remain a key risk for Adult Social Care which needs to be considered as part of budget proposals.</p> <p>There are private providers of community meals services in the county which could potentially mitigate this effect for some users.</p>



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	<p>The proposal to charge an annual membership fee for the Grass Routes scheme (C&amp;P8) will help support the continued operation of the scheme providing demand-responsive transport to residents who require it.</p>	<p>The proposed charge for the Grass Routes membership scheme (C&amp;P8), an annual £10, fee will result in an increased cost for scheme members to use the service, Currently the service is used by 250 people. Those who do not wish to join the scheme will be able to access public transport services, albeit they will be less flexible than the service they currently receive.</p>	<p>Those who do not wish to join the scheme (C&amp;P8) will be able to access public transport services, albeit they will be less flexible than the demand-responsive subsidised service they currently receive.</p> <p>As highlighted in the age category, following public consultation there will be no changes to Community Hub opening hours. This will protect face-to-face counter service in our largest towns. These services provide a vital safety net for vulnerable people including disabled people.</p> <p>Where any savings result in compulsory redundancies, the process will make a determination in an unbiased and un predetermined way and with due regard for the impact relating to protected characteristics.</p>
Gender reassignment	<p>At this stage proposals haven't identified a particular overall impact, either positive or negative, on people who have undergone or are considering gender reassignment.</p>	<p>At this stage proposals haven't identified a particular overall impact, either positive or negative, on people who have undergone or are considering gender reassignment.</p>	<p>None identified at this stage.</p> <p>Where any savings result in compulsory redundancies, the process will make a determination in an unbiased and un predetermined way and with due regard</p>

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		We know from research, that people with some protected characteristics are likely to be disproportionately represented in the lower income bands. This means they could be proportionality more likely to be affected by any increases in fees and charges.	for the impact relating to protected characteristics.
Marriage or civil partnership	<p>At this stage proposals haven't identified a particular overall impact, either positive or negative.</p> <p>Same-sex couples who register as civil partners have the same rights as married couples in employment and must be provided with the same benefits available to married couples, such as survivor pensions, flexible working, maternity/paternity pay and healthcare insurance.</p>	<p>At this stage proposals haven't identified a particular overall impact, either positive or negative.</p> <p>We know from research, that people with some protected characteristics are likely to be disproportionately represented in the lower income bands. This means they could be proportionality more likely to be affected by any increases in fees and charges.</p>	<p>None identified at this stage.</p> <p>Where any savings result in compulsory redundancies, the process will make a determination in an unbiased and un predetermined way and with due regard for the impact relating to protected characteristics.</p>
Pregnancy or maternity	<p>At this stage proposals haven't identified a particular overall impact, either positive or negative.</p> <p>In the provision of services, goods and facilities, recreational or training facilities, a woman is protected from discrimination during the period of her pregnancy and</p>	<p>At this stage proposals haven't identified a particular overall impact, either positive or negative.</p> <p>We know from research, that people with some protected characteristics are likely to be disproportionately represented in the lower income bands. This means they could be</p>	<p>None identified at this stage.</p> <p>Where any savings result in compulsory redundancies, the process will make a determination in an unbiased and un predetermined way and with due regard for the impact relating to protected characteristics.</p>

<b>Protected Characteristics</b>	<b>Describe any positive impacts your proposal has on the protected characteristic</b>	<b>Describe any negative impacts your proposal has on the protected characteristic</b>	<b>What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?</b>
	the period of 26 weeks beginning with the day on which she gives birth.	proportionality more likely to be affected by any increases in fees and charges.	
<b>Race</b>	At this stage proposals haven't identified a particular overall impact, either positive or negative, that will differ by race.	At this stage proposals haven't identified a particular overall impact, either positive or negative, that will differ by race.  We know from research, that people with some protected characteristics are likely to be disproportionately represented in the lower income bands. This means they could be proportionality more likely to be affected by any increases in fees and charges.	None identified at this stage.  Where any savings result in compulsory redundancies, the process will make a determination in an unbiased and un predetermined way and with due regard for the impact relating to protected characteristics.
<b>Religion or Belief</b>	At this stage proposals haven't identified a particular overall impact, either positive or negative, that will differ by religion or belief.	At this stage proposals haven't identified a particular overall impact, either positive or negative.  We know from research, that people with some protected characteristics are likely to be disproportionately represented in the lower income bands. This means they could be proportionality more likely to be affected by any increases in fees and charges.	None identified at this stage.  Where any savings result in compulsory redundancies, the process will make a determination in an unbiased and un predetermined way and with due regard for the impact relating to protected characteristics.
<b>Sex</b>	The council has already carried out a full pay evaluation exercise.	Women make up the majority of both paid and unpaid caring roles. Any reduction in services available for adults with care and support needs will negatively impact on carers; and therefore, the impact will be felt	Existing vacancies with home care teams are being held vacant to minimise the potential impact on the current workforce (SCH10).

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		<p>disproportionately on women (SCH 3 &amp; SCH 10)</p> <p>A number of proposals include a reduction on the number of jobs through the release of vacant posts. In some cases, there may be redundancies as a result of the proposals. While each department's staffing mix differs, the council's workforce is 70% female and therefore any reductions in staff numbers are likely to have a disproportionate effect on women.</p>	<p>We will ensure that the Protection of Employment Policy is adhered to at all times. This will ensure that we are able to redeploy staff wherever possible. We are applying stringent checks to ensure only essential vacancies are advertised. This will help minimise any redundancies. Trade Unions will be briefed through meeting of the Joint Advisory Group in January.</p>
Sexual Orientation	<p>At this stage proposals haven't identified a particular overall impact, either positive or negative that will differ according to ones sexual orientation.</p>	<p>At this stage, proposals haven't identified a particular overall impact, either positive or negative.</p> <p>We know from research, that people with some protected characteristics are likely to be disproportionately represented in the lower income bands and therefore proportionality more likely to be affected by increases in fees and charges.</p>	<p>None identified at this stage.</p> <p>Where any savings result in compulsory redundancies the process will make a determination in an unbiased and un predetermined way and with due regard for the impact relating to protected characteristics.</p>

## 2. The Socio-economic Duty and Social Justice

The Socio-economic Duty requires public bodies to have due regard to the need to reduce inequalities of outcome which result from socio-economic disadvantage when taking key decisions This duty aligns with our commitment as an authority to Social Justice.

	<b>Describe any positive impacts your proposal has in respect of people suffering socio economic disadvantage</b>	<b>Describe any negative impacts your proposal has in respect of people suffering socio economic disadvantage.</b>	<b>What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?</b>
<b>Socio-economic Duty and Social Justice</b>	<p>The Council provides a range of services that support people experiencing socio-economic disadvantage. Any increase in fees and charges for services will have a higher impact on households with the lowest incomes. Many service areas already have mitigations or discounts in place to reduce the socio-economic impact of charges.</p> <p>Uplifting social care provider fees (SCHP 5) will enable those providing social care to continue pay the real living wage to care workers who are typically on lower incomes. This is in line with the commitment made by the Welsh Government.</p> <p>Children who are looked after and care experienced young people often face socio-economic disadvantages and a paucity of support networks. Practice change in children's services (SCH 7) seeks to provide</p>	<p>As referred to in section one, reducing the subsidy for concessionary home to school transport (C&amp;P 22) may mean that some children will no longer be able to afford the service. We will continue to provide free home-to-school transport in line with statutory requirements. This change affects those who do not qualify for free transport.</p> <p>Adults with care and support needs, and their carers, can often be economically disadvantaged. As highlighted in the</p>	<p>Families will have the option to pay the cost of home to school transport across the academic year (C&amp;P 22).</p> <p>There will be a renewed focus on assessment and review of care and support needs for adults requiring social</p>

	<b>Describe any positive impacts your proposal has in respect of people suffering socio economic disadvantage</b>	<b>Describe any negative impacts your proposal has in respect of people suffering socio economic disadvantage.</b>	<b>What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?</b>
	<p>the best support for young people as they approach adulthood through the provision of appropriate accommodation, support and services that should have a positive effect on their longer-term social and economic well-being.</p> <p>The case to invest in foster carer fees and allowances (SCH P6) should enable more children in care to remain in the local area. This in turn should contribute towards reducing the inequalities across a whole range of outcomes associated with socio-economic disadvantage.</p> <p>As highlighted in section 1, community hubs provide a safety net for the most vulnerable in Monmouthshire and are a place where people access social networks and support. The decision to maintain opening hours following the public consultation will ensure we can continue to provide face-to-face support in communities. This includes access to training to increase skill levels and support to find jobs.</p>	<p>introduction, there is a correlation between some protected characteristics and an increased risk of poverty. The more protected characteristics a person has, the more likely they are to experience financial hardship.</p> <p>People with learning disabilities and physical disabilities can face barriers in accessing work and are more likely to be on low incomes. Practice change in social care (SCH 3) aims to generate savings through a range of approaches including prevention and early intervention that enables people to maximise their independence. Any reduction in the level of care available to an individual would only take place after a review of their individual needs. However, it is conceivable that a reduction in care could impact negatively on adults and their carers and may increase the risk of socio-economic disadvantage, for example, they may also not be able to afford to pay for any additional care and support. Alongside this a focus on reablement approaches</p>	<p>care support. A focus on reablement approaches allows people to maximise their independence that is in line with the requirements of the Social Services and Well Being Act (SCH 3).</p>

	<b>Describe any positive impacts your proposal has in respect of people suffering socio economic disadvantage</b>	<b>Describe any negative impacts your proposal has in respect of people suffering socio economic disadvantage.</b>	<b>What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?</b>
		<p>allows people to maximise their independence.</p> <p>The budget contains a proposal to increase charges for domiciliary care from £20 to £24 per hour. (Fees and Charges report). These are currently capped at £100 per week in Wales, which provides a significant mitigation. A further mitigation is provided in the form of means testing, as only those who are assessed as being able to afford this will pay. There will also be increases in fees for residential care. This will impact on proportionately more older people. These are also means tested providing mitigation to those on the lowest incomes.</p> <p>As highlighted in section one, the price people pay to have Monmouthshire Meals delivered to their homes will increase. Private alternatives are in place for those who cannot or do not want to pay the higher charge. However, we recognise that private providers may not deliver to all geographical areas of our county,</p>	<p>Charges for domiciliary care are currently capped at £100 per week in Wales. Means testing is also in place so only those who are assessed as being able to afford this will pay. See the Fees and Charges report which is part of the budget proposals for more details.</p> <p>Ensuring that practitioners in social care understand the impact of socio-economic disadvantage on individuals with care and support needs and have the right skills and knowledge to be able to support people in such circumstances (across social care).</p>

	<b>Describe any positive impacts your proposal has in respect of people suffering socio economic disadvantage</b>	<b>Describe any negative impacts your proposal has in respect of people suffering socio economic disadvantage.</b>	<b>What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?</b>
		<p>exacerbating issues of geographical inequality.</p> <p>Increases to car park charges (C&amp;P 3) will have a disproportionate effect on those experiencing socio-economic disadvantage who may have to pay a higher proportion of their income to park near their workplace or when accessing services in town centres.</p> <p>The proposal to change the Grass Routes membership scheme to an annual £10 membership fee will create a small financial cost for residents who wish to join the scheme. The fee will support the continued operation of the scheme enabling those who use it to continue to access a range of social and economic opportunities across Monmouthshire (C&amp;P8).</p> <p>The proposal to reduce the operational hours of the Borough Theatre and reductions in staffing hours may reduce the opportunities for the existing team to be involved in community activities offered to those suffering from socio-economic disadvantage. Concessionary</p>	<p>Those who do not wish to join the Grass Routes scheme will be able to access public transport services, albeit they will be less flexible than the subsidised demand-responsive service they currently enjoy (C&amp;P8).</p> <p>A focused and targeted program of events for residents and visitors will increase footfall and overall income to the Borough theatre. Concessionary rates will continue to be available to those who require them. (MLS1)</p>



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		<p>rates to the theatre will continue to be available to those who require them helping maintain access to cultural opportunities. (MLS1)</p> <p>The proposals could result in a reduction of youth service in some communities while maintaining youth centres in towns. Where a young person travels to the youth centre, their journey could include having to travel by vehicle including public transport which could be a barrier to access and participation highlighting issues of geographical inequality that exist in rural counties such as Monmouthshire. (MLS4)</p> <p>As part of the proposal to lease Old Station Tintern to a commercial operator it will be made clear to a new operator that they should offer subsidised rates for those who visit that may be on low/reduced incomes, this cannot be guaranteed. (MLS7).</p> <p>Discontinuing or reducing the use of external translators will negatively impact a small number of micro-businesses in the Welsh language</p>	<p>The youth centres are open immediately after school. This means that any young person who wishes to access the provision can do, straight after school, extending their school day into their free time and preventing them having to make the journey home and return to the centre. (MLS4)</p> <p>To specify to any potential new operator for Old Station Tintern that they offer subsidised rates for those who visit that may be on low/reduced incomes to ensure that the site is open and accessible to all. (MLS7)</p>

	<b>Describe any positive impacts your proposal has in respect of people suffering socio economic disadvantage</b>	<b>Describe any negative impacts your proposal has in respect of people suffering socio economic disadvantage.</b>	<b>What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?</b>
		<p>sector. These businesses may struggle to find alternative work. This challenge is compounded by advancements in AI translation technologies, which may already be reducing the demand for their services. (CEO2)</p> <p>An increase in Council Tax will have a financial impact on all households on lower incomes, as any bills will form a higher proportion of their household expenditure. As a result they are likely to feel the impact more acutely. Those who are eligible, are able to apply for a reduction in council tax through the Council Tax reduction scheme which will mitigate the effects of the increase.</p> <p>There is a risk that any budget proposals that increase discretionary charges will have a disproportionate impact on people on low incomes and therefore will widen economic inequality.</p> <p>A number of proposals include reducing staffing, through reducing employment hours, vacant posts or possible redundancies. This will have a socio-</p>	<p>The Council Tax reduction scheme offers some mitigation, council tax is means tested and those who qualify are able to apply for a reduction. Single person households are eligible for a 25% reduction on council tax.</p> <p>We will ensure that the Protection of Employment Policy is adhered to at all times. This will ensure that we are able to redeploy staff wherever possible. We are applying stringent checks to ensure only essential vacancies are advertised. This will help minimise any redundancies. Trade Unions will be briefed through the Joint Advisory Group.</p> <p>It is important to assess and understand the impact of our proposals on those in poverty, especially if there is a cumulative impact from a number of proposals. The evidence in this paper helps assess the overall potential impact of the budget on different people within our communities and looks to establish</p>

	<b>Describe any positive impacts your proposal has in respect of people suffering socio economic disadvantage</b>	<b>Describe any negative impacts your proposal has in respect of people suffering socio economic disadvantage.</b>	<b>What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?</b>
		economic impact on those council employees affected.	the cumulative financial impact of the budget.

### 3. Policy making and the Welsh language.

How does your proposal impact on the following aspects of the Council's Welsh Language Standards:	Describe the positive impacts of this proposal	Describe the negative impacts of this proposal	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts
<b>Policy Making</b> Effects on the use of the Welsh language, Promoting Welsh language Treating the Welsh language no less favourably.	<p>Welsh medium youth clubs will not be impacted by proposals to reduce the youth service budget and provisions. However, the URDD youth clubs are 100% funded by an external grant. (MLS4)</p> <p>All proposals will comply with the Welsh Language standards applicable to the authority.</p>	<p>Discontinuing or reducing the use of external translators will negatively impact a small number of micro-businesses in the Welsh language sector. These businesses may struggle to find alternative work at the same rate they have been receiving from the council for many years. This challenge is compounded by advancements in AI translation technologies, which may already be reducing the demand for their services. (CEO2)</p>	<p>Ensure collaboration with partners to look at ways of sustaining Youth Service provisions, post grant funding and in the event of a reduction in grant funding. (MLS4)</p> <p>All signage and material arising from budget proposals will be compliant with the Welsh Language (Wales) Measure 2011 and Welsh Language Standards.</p>
<b>Operational</b> Recruitment & Training of workforce	<p>We will ensure that new vacancies are assessed and where possible advertised as 'Welsh essential' to increase opportunities for people to engage with the council through the medium of Welsh.</p>	<p>Budget proposals identify potential redundancies. In some instances, these could result in a reduction in the number of Welsh speakers employed and could decrease opportunities for the current workforce to improve their Welsh language skills due to a reduction in staffing.</p>	<p>Ensure that new roles are assessed to determine Welsh language requirements. Active promotion of vacancies in Welsh language publications and websites as well as targeted promotion via LinkedIn.</p> <p>Continue to promote and fund language courses to increase the number of learners in line with the aspirations in our Welsh Language Strategy</p>

			Where there are proposed reductions to staffing hours in Community Hubs rotas will be looked at with a view to reducing risks of losing Welsh speaking staff. (MLS3)
<b>Service delivery</b> Use of Welsh language in service delivery Promoting use of the language	Proposals to employ internal translators or outsource translations to other local authorities will allow the council to establish a more standardised approach to translations across the authority which will have a positive impact on the quality and consistency of translations. Reducing the cost of translation will also enable the authority to prioritise its language budget on training opportunities and language promotion, contributing to the commitments of our Welsh Language Strategy. (CEO2)	Proposals to lease sites to a commercial operator, to reduce operating costs, could make it more difficult for the council to ensure that bilingual services are being provided. (MLS7)	Ensure that appropriate mitigations are put in place at a service level to mitigate the loss of any individuals on our overall ability to provide services in Welsh.  Where there are proposals to lease sites to commercial operators, Welsh language requirements would need to be specified in contracts (MLS 7).

**4. Does your proposal deliver any of the well-being goals below?** Please explain the impact (positive and negative) you expect, together with suggestions of how to mitigate negative impacts or better contribute to the goal.

Well-being Goal	Does the proposal contribute to this goal? Describe the positive and negative impacts.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
<p><b>A prosperous Wales</b> Efficient use of resources, skilled, educated people, generates wealth, provides jobs</p>	<p>Overall spending on services will increase as a result of this budget. This will ensure that the council is able to continue to run services that meet the needs of people, communities and businesses contributing to all of the national well-being goals as well as the aspirations of our Community and Corporate Plan for Monmouthshire to be a thriving and ambitious place.</p> <p>There are however a number of downsides as the increase in spending is insufficient to keep pace with higher prices and increased demand for services. A number of proposals involve redundancies, which will reduce the total number of jobs in the county having a potential negative impact on this goal, albeit a very small one when considering the size of the workforce as a whole.</p> <p>Several pressure mandates set out additional resource requirements for specialist education support in order to ensure that young people are able to receive the support they require. This could support their future job prospects.</p> <p>A small reduction in the workforce in the Monmouthshire specialist teacher team (CYP S1) could have a negative impact on the support received by some children and young people.</p>	<p>Wherever possible, posts that are deleted will be vacant posts, reducing the number of compulsory redundancies necessary.</p>




Well-being Goal	Does the proposal contribute to this goal? Describe the positive and negative impacts.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
<p><b>A resilient Wales</b> Maintain and enhance biodiversity and ecosystems that support resilience and can adapt to change (e.g. climate change)</p>	<p>Tackling climate change is one of the biggest priorities of our organisation. This budget recognises the need for increased spending in a number of areas that will enable us to continue this work.</p> <p>As part of the proposal to lease Old Station Tintern to a commercial operator, the potential impact on the biodiversity of Old Station Tintern needs to be considered and requirements of the new operator to have adequate ecological expertise assessed (MLS7).</p>	<p>To specify within the terms of the lease the necessary ecological expertise and understanding of responsibilities for Old Station Tintern (MLS 7).</p>
<p><b>A healthier Wales</b> People's physical and mental wellbeing is maximised, and health impacts are understood</p>	<p>Our Community and Corporate Plan commits us to taking action to create healthy and sustainable places where the health inequalities that exist within and between communities have been reduced. The budget continues to invest in a wide range of services that make it possible for us to achieve this.</p> <p>A number of proposals which involve redundancies may have a negative impact on the mental health of those staff affected. This may also affect the well-being of remaining staff due to additional workload and pressure. We are applying stringent checks to ensure only essential vacancies are advertised. This will help minimise any redundancies.</p> <p>Reducing some services, for example Borough Theatre hours (MLS1) and youth service provision (MLS4) may also have a negative impact on the</p>	<p>Where staff are put at risk of redundancy, measures will be put in place to help them, such as guaranteed interviews for internal posts for suitable candidates and employment and skills support.</p>


Well-being Goal	Does the proposal contribute to this goal? Describe the positive and negative impacts.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
	<p>mental health of the users of those services, as well as staff and volunteers.</p> <p>A number of pressure proposals also require investment in order to maintain existing levels of service in social care and health which will have a positive impact on well-being (e.g. SCH P1, P2, P4).</p>	
<p><b>A Wales of cohesive communities</b> Communities are attractive, viable, safe and well connected</p>	<p>We are committed to investing in a range of services that contribute to our policy aspirations for Monmouthshire to be a thriving safe and well-connected county where people feel part of their community.</p> <p>Finding ways to ensure that the Grass Routes service (C&amp;P8) remains viable could make a positive contribution towards enabling older people to stay in their homes and communities. Grass Routes is an important way of connecting rural communities with local services.</p>	<p>The decision to maintain opening hours at our community hubs will protect face-to-face counter service in our largest towns, something that is valued by many people as these services provide a vital safety net for vulnerable people alongside the provision of universal services for the whole community (MLS 3)</p>
<p><b>A globally responsible Wales</b> Taking account of impact on global well-being when considering local social, economic and environmental wellbeing</p>	<p>Our commitment to tackling climate change by decarbonising our operations is a small part of a wider global effort.</p> <p>A number of service areas will see an additional investment as a result of these proposals. This includes recycling (C&amp;P5) and transitioning to low emission fleet (C&amp;P4), ensuring that services that reduce our climate emissions are able to be maintained.</p>	<p>None identified at this stage</p>




Well-being Goal	Does the proposal contribute to this goal? Describe the positive and negative impacts.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
<p><b>A Wales of vibrant culture and thriving Welsh language</b> Culture, heritage and Welsh language are promoted and protected. People are encouraged to do sport, art and recreation</p>	<p>As part of our commitment to making Monmouthshire a thriving and ambitious place we are continuing to support Monmouthshire's towns and visitor attractions making them accessible and welcoming where amenities, events and experiences are attractive for residents, visitors and businesses. Sometimes we have to make changes and look to different ways to keep services running but we continue to think differently keep services operating.</p> <p>As part of the proposal to lease Old Station Tintern to a commercial operator, the potential impact on the cultural and heritage assets of Old Station Tintern needs to be considered and requirements of new operator to have adequate heritage expertise assessed (MLS7).</p>	<p>To specify within the terms of the lease the necessary heritage expertise and understanding of responsibilities for Old Station Tintern (MLS 7).</p>
<p><b>A more equal Wales</b> People can fulfil their potential no matter what their background or circumstances</p>	<p>Tackling inequalities, working with and alongside our communities is one of the absolute priorities of the council. This is enshrined in the budget principles within the Medium Term Financial Strategy which are the cornerstone of the budget.</p> <p>See Protected Characteristics and Socio-Economic Duty sections above for further details.</p>	<p>Each proposal within the budget is assessed to identify the effects on the most vulnerable in our society. Where we identify changes could have a disproportionate adverse effect on those with protected characteristics or who suffer socio-economic disadvantage we have taken that into account and sought to mitigate the effect by refining the proposals as we have gone along.</p> <p>See Protected Characteristics and Socio-Economic Duty sections above for further details.</p>

## 5. How has your proposal embedded and prioritised the sustainable governance principles in its development?

Sustainable Development Principle	Does your proposal demonstrate you have met this principle? If yes, describe how. If not explain why.	Are there any additional actions to be taken to mitigate any negative impacts or better contribute to positive impacts?
 <p>Balancing short term need with long term and planning for the future</p> <p>Long Term</p>	<p>The requirement for short term financial savings may have an impact on the ability to deliver quality services in the long term. For a number of posts and workstreams across all directorates there is an increasing reliance on grant-funded posts and projects, these are often for fixed term periods in the shorter term. This can be a challenge to their longer-term viability.</p>	<p>Wherever possible, proposals are only reducing service levels (e.g. by reducing opening hours or staffing) rather than closing services. This ensures that core services can still be continued in the long term.</p> <p>The Council has developed a Medium-Term Financial Strategy, this provides the strategic framework to guide medium term financial planning. This will help ensure a focus on the council's long-term policy objectives and its financial capacity.</p>
 <p>Working together with other partners to deliver objectives</p> <p>Collaboration</p>	<p>For many of the budget proposals, partnership working is key to being able to continue delivering services. Some of the proposals will require closer working with partners and businesses to ensure that the proposal is delivered effectively without negatively impacting services (e.g. MLS7 Old Station and CEO4 Systems and Payroll automation)</p>	<p>Clear expectations and communication established with all partners we collaborate with.</p>
 <p>Involving those with an interest and seeking their views</p> <p>Involvement</p>	<p>We are committed to working with and alongside our communities to shape the future of the council and the communities it serves.</p> <p>Individually, some of the budget proposals have been subject to consultation to assess the impact on service users. For other proposals, this engagement has not yet taken place or is planned at the same time as the budget engagement process.</p>	<p>Ensure that proposals and the accompanying Integrated Impact Assessments are updated as a result of any further consultation and engagement. The decision to maintain opening hours at our community hubs, following public consultation shows that Cabinet have listened to the views of communities.</p>

Sustainable Development Principle	Does your proposal demonstrate you have met this principle? If yes, describe how. If not explain why.	Are there any additional actions to be taken to mitigate any negative impacts or better contribute to positive impacts?
	Overall, these proposals have formed part of the budget consultation and were subject to a full and extensive public consultation and engagement exercise.	
 <p>Putting resources into preventing problems occurring or getting worse</p>	<p>Wherever possible, proposals aim to prevent problems occurring or getting worse (e.g. Children social care (SCH S7) and Adults social care (SCH S3) practice change).</p> <p>With the scale of savings that are needed, some proposals may impact on the council's ability to maximise preventative work, which may lead to challenges in the future. Examples of this include in social care where high-cost placements or packages of care impact on the services ability to turn resources to prevention and community based enabling support (SCH P1). Also, the small reduction in the workforce in education (CYP S1) could have a negative impact on this service working in a preventative manner with an early intervention focus to supporting children and young people.</p>	<p>Wherever possible, posts that are already vacant are those that are being proposed to be removed, meaning that the impact of the reduction in staffing is lower. However, teams across the council are already under pressure, and not replacing vacant posts could mean the council is less able to be proactive and preventative.</p> <p>Increased demand, the fragility of the social care sector and the availability of care staff remains a key risk for Adult Social Care although some of these issues are outside the Council's direct control to address. Alongside the budget proposals, work is being undertaken to develop the council's preventative approach in social care.</p>

Sustainable Development Principle	Does your proposal demonstrate you have met this principle? If yes, describe how. If not explain why.	Are there any additional actions to be taken to mitigate any negative impacts or better contribute to positive impacts?
 <p><b>Integration</b></p> <p>Considering impact on all wellbeing goals together and on other bodies</p>	<p>The council works across multiple areas and many of these proposals can have positive and potentially negative impacts on one another. It is important that as individual proposals are developed, we seek to balance competing impacts and fully consider the impacts that proposals will have on other organisations.</p>	<p>Use of this Cumulative Impact Assessment will help to identify overall impacts of proposals in an integrated way, as well as assessing specific proposals individually.</p>

**6. The council has agreed the need to consider the impact its decisions have on the following important responsibilities: Corporate Parenting and Safeguarding. Are your proposals going to affect any of these responsibilities?**

	<b>Describe any positive impacts your proposal has</b>	<b>Describe any negative impacts your proposal has</b>	<b>What will you do/ have you done to mitigate any negative impacts or better contribute to positive impacts?</b>
Safeguarding	Safeguarding is about ensuring that everything is in place to promote the well-being of children and vulnerable adults, preventing them from being harmed and protecting those who are at risk of abuse and neglect. Specific proposals include an assessment of the impact on safeguarding.	Specific proposals include an assessment of the impact on safeguarding, including any potential negative impact on delivering the Council's safeguarding responsibilities.	Specific proposals include an assessment on the impact on safeguarding, including mitigation related to the potential impact on delivering the Council's safeguarding responsibilities.  Safeguarding is at the heart of everything the council does. All staff are trained to a level that is appropriate to their role.
Corporate Parenting, Care Leavers and Care Experienced people	The council has a responsibility to children who are looked after. The council has a corporate duty to consider children looked after especially and promote their welfare (in a way, as though those children were their own). Specific proposals include an assessment on the impact on corporate parenting.	Specific proposals include an assessment on the impact on corporate parenting, including any potential negative impact on delivering the Council's corporate parenting responsibilities.	Specific proposals include an assessment on the impact on corporate parenting, including mitigation related to the potential impact on delivering the Council's corporate parenting responsibilities

## 7. What evidence and data has informed the development of your proposal?

The proposals are based upon a wide range of data and evidence, and this will be contained within the evaluations of specific individual proposals.

Data sources include for example:

- Quantitative data such as user numbers, measuring whether changes have had a positive or negative impact on the number of people using the service, in some cases, such as preventative services less users will be a positive
- Qualitative data that gives people views of the service which includes analysis of complaints.
- Data derived from national sources such as ONS, Census and Stats Wales which allow us to measure the whole population.

## 8. SUMMARY: As a result of completing this form, what are the main positive and negative impacts of your proposal, how have they informed/changed the development of the proposal so far and what will you be doing in future?

Where an individual budget proposal could alter a service, or the way it is delivered, an Integrated Impact Assessment has been completed.

This assessment summarises the headline message from these specific individual assessments where proposals have been identified as having a positive or negative impact on those with protected characteristics, the socio-economic duty, and the ways of working and national well-being goals. The assessment has been updated through the development of the budget proposals. This does not highlight every single issue but reveals some of the key impacts of budget proposals and provides scope for continual learning and improvement as proposals are developed.

## 9. ACTIONS: As a result of completing this form are there any further actions you will be undertaking? Please detail them below, if applicable.

What are you going to do	When are you going to do it?	Who is responsible
Existing actions have been identified within individual assessments.	As per budget proposal impact assessments	As per budget proposal impact assessments

## 10. VERSION CONTROL: The Equality and Future Generations Evaluation should be used at the earliest stage, such as informally within your service, and then further developed throughout the decision-making process. It is important to

**keep a record of this process to demonstrate how you have considered and built into equality and future generations considerations wherever possible.**

<b>Version No.</b>	<b>Decision making stage</b>	<b>Date considered</b>	<b>Brief description of any amendments made following consideration</b>
0.3	Strategic Leadership Team and Cabinet	Ongoing during development of proposals	Amendments made within the form
1.0	Draft budget proposals 2025/26	22 January 2025	
2.0	Cabinet consideration of budget proposals following consultation	Scheduled for 5 <sup>th</sup> March 2025	Removal of proposed Community Hubs saving following public consultation.

## Part 2 - The Cumulative Financial Impact

The Socio-economic Duty requires local authorities to think about how their strategic decisions, affect inequality of outcomes for people who suffer socio-economic disadvantage. Monmouthshire has the highest level of income inequality in Wales and we recognise that any increase in fees and charges for services will have a higher impact on households on the lowest incomes. In addition, we know that there are geographical inequalities in our counties, for example the challenges faced by rural communities are very different from those in towns. Assessing geographical disparities is something we do operationally by targeting services such as housing and social care and this is taken into account in the way that services are delivered.

This section looks at the combined effect of increased fees and charges on different household compositions and income levels. We do this because many individual changes can sometimes seem small when looked at in isolation but can add up to a more significant sum when taken together. This is one of the ways we meet our socio-economic duty. It also means we can identify where we need to apply a degree of mitigation to reduce the potential negative impacts of our proposals.

The impact below has been modelled on some of the planned increases in fees and charges. We have used seven different household types, one more than last year. For each household type we have modelled the cumulative financial impact based on different household incomes. The financial modelling does not include an analysis of people by protected characteristics as that is covered by part one of this report. However, we know from research, that people with some protected characteristics are likely to be disproportionately represented in the lower income bands. Research by the Health Foundation has highlighted that disabled people are two percentage points more likely to be in poverty than non-disabled people. Younger households, at the earlier stages of their careers could be more likely to be on lower incomes. The increases in fees and charges modelled to develop this assessment along with further information on the methodology used are shown in Appendix 2.

### Cumulative Financial Impact – Before and after mitigating actions.

Household	Income	Forecast Cost <i>after mitigation</i> (percentage of income shown in brackets)	Initial proposed increase <i>before</i> mitigation (percentage of income shown in brackets)	The amount of money our mitigating measures reduced costs by
<b>Household 1 –</b> 2 Adults, 2 Dependent Children, 1 Older Person	£34,000	£424.18 (1.3%)	£1,529.96 (4.5%)	£1,105.78
	£49,000	£489.96 (1.0%)	£1,529.96 (3.1%)	£1,040.00
	£56,000	£489.96 (0.9%)	£1,529.96 (2.7%)	£1,040.00
	£70,000	£489.96 (0.7%)	£1,529.96 (2.2%)	£1,040.00
<b>Household 2 –</b> 2 Adults, 2 Dependent Children	£22,000	£180.18 (0.8%)	£245.96 (1.1%)	£65.78
	£34,000	£245.96 (0.7%)	£245.96 (0.7%)	-
	£37,000	£245.96 (0.7%)	£245.96 (0.7%)	-
	£59,000	£245.96 (0.4%)	£245.96 (0.4%)	-
<b>Household 3 –</b>	£17,000	£114.40 (0.7%)	£245.96 (1.5%)	£131.56
	£22,000	£180.18 (0.8%)	£245.96 (1.1%)	£65.78



Household	Income	Forecast Cost <i>after</i> mitigation (percentage of income shown in brackets)	Initial proposed increase <i>before</i> mitigation (percentage of income shown in brackets)	The amount of money our mitigating measures reduced costs by
1 Adult, 2 Dependent Children	£28,000	£213.07 (0.8%)	£245.96 (0.9%)	£32.89
	£37,000	£213.07 (0.6%)	£245.96 (0.7%)	£32.89
<b>Household 4 –</b> 2 Adults (both aged below 66)	£22,000	£84.18 (0.4%)	£149.96 (0.7%)	£65.78
	£34,000	£149.96 (0.4%)	£149.96 (0.4%)	-
	£37,000	£149.96 (0.4%)	£149.96 (0.4%)	-
	£59,000	£149.96 (0.3%)	£149.96 (0.3%)	-
<b>Household 5 –</b> 2 Adults (both aged over 66)	£22,000	£553.78 (2.5%)	£1,659.56 (7.5%)	£1,105.78
	£24,000	£619.56 (2.6%)	£1,659.56 (6.9%)	£1,040.00
	£37,000	£619.56 (1.7%)	£1,659.56 (4.5%)	£1,040.00
	£49,000	£619.56 (1.3%)	£1,659.56 (3.4%)	£1,040.00
<b>Household 6 –</b> 1 Older Person	£12,000	£244.00 (2.0%)	£1,415.56 (11.8%)	£1,171.56
	£17,000	£244.00 (1.4%)	£1,415.56 (8.3%)	£1,171.56
	£22,000	£309.78 (1.4%)	£1,415.56 (6.4%)	£1,105.78
	£37,000	£342.67 (0.9%)	£1,415.56 (3.8%)	£1,072.89
<b>Household 7 –</b> 1 Younger Person (working age)	£15,000	£18.40 (0.1%)	£149.96 (1.0%)	£131.56
	£22,000	£84.18 (0.4%)	£149.96 (0.7%)	£65.78
	£28,000	£117.07 (0.4%)	£149.96 (0.5%)	£32.89
	£37,000	£117.07 (0.3%)	£149.96 (0.4%)	£32.89

The proposed Council Tax increase of 7.8% will result in an additional monthly cost of £131.56 on a Band D property. If a household is on a low income, they may be eligible for the Council Tax Reduction Scheme which would reduce their Council Tax bill.<sup>1</sup> This is calculated on individual circumstances and the entitlement varies; the model includes reductions of 50% and 100% for certain household incomes. It also includes a 25% single persons discount attributed to some income bands in relevant households. It is unlikely that someone on a low income would be paying for social care and there is a £100 weekly cap for care at home. As incomes rise it would be expected that many households will be living in more expensive properties and would be paying higher rates of council tax. A breakdown of the charges and methodology used to produce the table above can be found in appendix 2.

#### **Household 1 – 2 Adults, 2 Dependent Children, 1 Older Person**

For a household with an income of £34,000, the potential impact on their income from the increased fees and charges is an increased annual spend of £424.18 equating to 1.3% of their total income. The mitigations put in place have ensured that this impact has been reduced from a potential figure of £1,529.96 or 4.5% of their total income.

For households with incomes of £34,000, £37,000 and £59,000 the mitigated increased fees and charges equate to 1.0%, 0.9% and 0.7% of their total annual income respectively. The mitigations put in place have ensured that this has reduced from 3.1%, 2.7% and 2.2%.

One of the largest increases would be the possible increased cost of community meals, based on the older person within the household receiving 5 meals a week for a year. Social care charges have also been considered for the older person within the household, modelling a £1,040 annual increase based on 5 hours of care a week. However, the increase in cost will be completely mitigated for those receiving more than 5 hours of care a week due to the weekly cap of £100. The use of a five-hour care package has been used as part of the cumulative impact assessment modelling by this authority for many years and is retained for the purposes of consistency. However, this is below the average care package in Monmouthshire, therefore the numbers of household requiring less than 5 hours of care a week is small – which means the increase across all households will be mitigated for the vast majority of those receiving care.

The proposed £10 annual charge for the Grass Routes membership scheme has also been modelled. A council tax reduction has been modelled against the lowest income threshold, as the model assumes the older person within the household would be receiving pension credit. Other charges modelled for all income bands are: proposed increases in concessionary home to school transport for both children, an increase in car parking charges, and residential street parking permit charges for the household.

#### **Household 2 - 2 Adults, 2 Dependent Children**

For a household with an income of £22,000, the potential impact on their income from the increased fees and charges is an increased annual spend of £180.18 equating to 0.8% of their total income. The mitigations put in place have ensured that this impact has been reduced from a potential figure of £245.96 or 1.1% of their total income.

For households with an income of £34,000, £37,000 and £59,000 the increased fees and charges would be 0.7%, 0.7% and 0.4% of their total annual income respectively. There are no changes in costs on these income groups resulting from the mitigations put in place.

It has been modelled that the lowest household income will be eligible for the council tax reduction scheme at 50%, which would mitigate the 7.8% annual increase of £131.56 to £65.78. The non mitigated increase would constitute 1.1% of income for a household income of £22,000. For a household income of £34,000 it would be 0.7%. The percentage of income would be 0.7% and 0.4% for households with incomes of £37,000 and £59,000, respectively.

For this household, proposed increased charges have been modelled for concessionary seats on home to school transport (+£48 per child for a year) as well as proposed increases in car parking and residential street parking permit charges.

#### **Household 3 - 1 Adult, 2 Dependent Children**

For a household with an income of £17,000, the potential impact on their income from the increased fees and charges is an increased annual spend of £114.40 equating to 0.7% of their total income. The mitigations put in place have ensured that this impact has been reduced from a potential figure of £245.96 annually or 1.1% of their total income.

For households with incomes of £22,000, £28,000 and £37,000 the increased fees and charges equate to 0.8%, 0.8% and 0.6% of their total annual income respectively. The mitigations put in place have ensured that this has reduced from 1.1%, 0.9% and 0.7%.

Although the income for this household is likely to be less than that of the 2 Adult with 2 Children household, the increases in fees and charges on the household are very similar for the equivalent income bands, with a modelled £245.96 increase in annual costs before mitigations. This equates to 1.5% for a household with an income of £17,000. Whilst households with incomes of £22,000, £28,000 and £37,000 would see increases of 1.1% and below. Lower income bands have been included within the model to reflect the possibility of low-income single earner households.

For those earning £22,000 and under, mitigations have been included in the model due to the likelihood of their eligibility for the council tax reduction scheme. The lowest income band (£17,000) has a 100% reduction that negates the 7.8% modelled increase, whereas the £22,000 income household has a 50% reduction which would see an increased cost of £65.78 rather than £131.56. The higher income bands for the household composition have been attributed a 25% single persons discount (£98.67 increase compared to the full £131.56). The mitigated cost would be 0.7% for the £17,000 and 0.8% for the £22,000 income households, this is similar to the higher income bands, with the £28,000 household seeing a 0.8% rise and a 0.6% increase for households with an income of £37,000. For this household, the proposed increased charges have also been modelled for concessionary seats on home to school transport for both children alongside proposed increases in car parking and residential street parking permit charges.

#### **Household 4 - 2 Adults (working age)**

For a household with an income of £22,000, the potential impact on their income from the increased fees and charges is an increased annual spend of £84.18 equating to 0.4% of their total income. The mitigations put in place have ensured that this impact has been reduced from a potential figure of £149.96 or 0.7% of their total income.

For households with incomes of £34,000, £37,000 and £59,000 the increased fees and charges equate to 0.4%, 0.4% and 0.3% of their total annual income respectively. There are no changes on these income groups resulting from the mitigations put in place.

For the lowest income household of £22,000, mitigation has been included in the model due to the likelihood of their eligibility for the council tax reduction scheme.

This household composition is likely to be less affected than other households as they do not have any dependent children and may not require certain services such as adult social care.

#### **Household 5 - 2 Adults (both aged over 66)**

For a household with an income of £22,000, the potential impact on their income from the increased fees and charges is an increased annual spend of £553.78 equating to 2.5% of their total income. The mitigations put in place have ensured that this impact has been reduced from a potential figure of £1,659.56 or 7.5% of their total income.

For households with incomes of £24,000, £37,000 and £49,000 the increased fees and charges would be 2.6%, 1.7% and 1.3% of their total annual income respectively.

This is one of the largest percentages in the model. Should the household currently be at the £100 weekly social care cost cap, the model shows a 2.5% increase in costs for a £22,000 income household.

Most of the increase in cost is from the proposed annual increase in social care costs, the model is based on 5 hours care received per week, for 52 weeks a year which equates to a £1,040 increase per year. There is a mitigated cost of a £100 cap per week which would mean that the household is already at this limit if they are receiving 5 or more hours a week and would therefore see no additional increase in cost. An increase of £468 per year could also result from community meal charges – based on an assumption that both members of the household would receive 5 meals a week from the service. The proposed £10 annual charge for the Grass Routes membership scheme has also been modelled for both members of the household.

At the lowest income for this household modelled, £22,000, there is a modelled potential mitigated cost for council tax of £65.78 - which is an example of a 50% discount, which could be provided via the council tax reduction scheme. Alongside the charges noted above, the model includes a full council tax increase of 7.8% for all but the lowest income household, which would be £131.56 based on a Band D property.

#### **Household 6 - 1 Older Person**

For a household with an income of £12,000, the potential impact on their income from the increased fees and charges is an increased annual spend of £244.00 equating to 2.0% of their total annual income. The mitigations put in place have ensured that this impact has been reduced from a potential figure of £1,415.56 or 11.8% of their total annual income. This income figure is used as it is broadly in line with the state pension.

For households with incomes of £17,000, £22,000 and £37,000 the increased fees and charges equate to 1.4%, 1.4% and 0.9% of their total annual income respectively. The mitigations put in place have ensured that this has reduced from 8.3%, 6.4% and 3.8%.

The model shows potential mitigations in place for this household, including example potential council tax mitigations of 100% for the two lowest income bands and a 50% reduction for the £22,000 income household (an increase of £65.78 rather than £131.56). The £37,000 household has a 25% single persons discount allocated. This household could incur the increased costs for adult social care, the potential mitigation for the household of the social care cap being reached would limit, or could remove, as modelled, any increase in non-residential care fees. At all income levels the household could incur the potential increased cost for community meals and the Grass Routes membership scheme.

#### **Household 7 - 1 Younger Person (working age)**

For a household with an income of £15,000, the potential impact on their income from the increased fees and charges is an increased annual spend of £18.40 equating to 0.1% of their total annual income. The mitigations put in place have ensured that this impact has been reduced from a potential figure of £149.96 or 1.0% of their total income.

For households with incomes of £22,000, £28,000 and £37,000 the increased fees and charges equate to 0.4%, 0.4% and 0.3% of their total annual income respectively. The mitigations put in place have ensured that this has reduced from 0.7%, 0.5% and 0.4%.

All modelled income levels for this household have council tax reduction applied, of either a full or a 50% reduction, or single person discount of 25% applied. The single persons discount of at least a 25% reduction in Council Tax increase would see the 7.8% council tax increase resulting in a £98.67 cost per year rather than £131.56. Proposed increases in car parking and residential street parking permit charges have also been modelled.

## **Appendix 1 -The Legal Context**

Our evaluation is framed by the obligations we have as a council under the following acts.

**The Equality Act 2010** protects people from discrimination in the workplace and wider society. It provides a legal framework to protect the rights of individuals and advance equality of opportunity for all.

The public sector equality duty means that local authorities must consider or think about how their policies or decisions affect people who are protected under the Equality Act. We must do this when we design policies, deliver services and make decisions.

The protected characteristics are age; disability; sex; gender re-assignment; pregnancy and maternity; sexual orientation; race; religion or belief; marriage and civil partnership.

**The Well-being of Future Generations Act** creates a legal framework for better decision-making by public bodies in Wales by ensuring that we take account of the long-term, help to prevent problems occurring or getting worse, take an integrated and collaborative approach, and considers and involves people of all ages.

Together, the seven well-being goals and five ways of working provided by the Act are designed to support and deliver a public service that meets the needs of the present without compromising the ability of future generations to meet their own needs.

**The Socio-Economic Duty** came into effect in Wales on 31st March 2021 placing a responsibility on councils to consider the need to reduce the inequalities that result from socio-economic disadvantage. This evaluation is one of the ways we demonstrate our compliance with these duties.

**The Welsh Language (Wales) Measure 2011** established a legal framework that imposed a duty on Monmouthshire County Council, alongside other public organisations, to comply with standards relating to the Welsh language. The key principles of these standards are that the Welsh language should not be treated any less favourably than the English language and we should promote and facilitate the use of the language.

## Appendix 2 – Cumulative Financial Impact methodology

To model the cumulative financial impact, we have used seven different household types and identified varying annual household incomes for each.

Household composition data from the Census 2021 in Monmouthshire shows for each of the households modelled:

Household 1 - 2 Adults, 2 Dependent Children, 1 Older Person - 2% (689) of all household composition households from Census 2021 were multiple family households with dependent children.

Household 2 - 2 Adults, 2 Dependent Children – 17% (7033) of all household composition households from Census 2021 were single family households (married, civil partnership or cohabiting couple) with dependent children.

Household 3 - 1 Adult, 2 Dependent Children – 6% (2281) of all household composition households from Census 2021 were single family households (lone parent) with dependent children.

Household 4 - 2 Adults (working age) – 13% (5309) of all household composition households from Census 2021 were single family households (married or civil partnership) with no children. 5% (2235) households were noted as being co-habiting couple families with no children.

Household 5 – 2 Adults (both aged 66 and over) – Census 2021 data showed that there were over 11,000 residents in Monmouthshire that lived in a single-family household of this composition.

Household 6 - 1 Older Person – 16% (6534) of all household composition households from Census 2021 were single person households, aged 66 years or older.

Household 7 – 1 Adult (working age) - Census 2021 data showed that 14% (5753) of households were made up of one person households that are working age.

The latest information on income levels, wages, benefits and pension rates were used to inform the income level modeled for each household. This shows:

In April 2025, the full new State Pension will rise by £9.05 to £230.25 a week, which will provide an additional £470 a year. The full basic State Pension will also increase to £176.45 a week, an increase of £6.95 as week and £360 annually.<sup>2</sup> The annual level of benefit cap for couples (with or without children) or single claimants with a child of qualifying age is £423.46, equating to £22,020 per year.<sup>3</sup>

Data on income levels will continue to change as wage levels vary, the figures used provide an approximate indication. The National Living Wage is currently £11.44 per hour for those aged 21 and over. For someone working 35 hours per week, this equates to approximately £20,820.80 per year. For someone working 27 hours per week this is approximately £16,061.76 per year. This rate is due to rise to £12.21 per hour from April 2025 for those aged 21 and over<sup>4</sup>. For someone working 35 hours per week, this equates to around £22,222.20 per year. For someone working 27 hours per week, this equates to approximately £17,142.84 per year. Those who are aged 18-20 will be entitled to receive £10.00 per hour, equating to approximately £18,200 per year for those who work 35 hours per week.

As at the financial year 2021-22, 48.2% of lone parents in the UK are employed part-time, and over 3 in 10 are not employed (economically inactive). Women with children are more likely to work part-time, term-time or flexible working hours, compared to fathers or those without children. 47.1% of two parent families have one parent working full-time, and the other working part-time.<sup>5</sup> Average weekly hours of work for part-time workers in the UK is 16.8 hours.<sup>6</sup>

A person is commonly deemed to be in poverty if their household falls below 60% of the UK median household income. The latest data shows the UK median household income is £34,500 (ONS).<sup>7</sup> 60% of this equates to £20,700. The (provisional) figure for median weekly earnings per household is £717.90 in Monmouthshire according to the ONS, this would aggregate to an annual income of £37,331.<sup>8</sup>



## Fees and charges

Each of the planned increases in fees and charges identified to be used in the cumulative financial impact model are shown in the table below. This does not cover every fee and charge within the budget, these have been selected to provide an indication of potential increases for households. Full details on fees and charges are in the budget papers. This shows the Total (T) and Mitigated (M) increase in cost for those fees and charges modelled.

Fees and charges	Increase	Mitigation		2 Adults 2 Dependent Children 1 Older Person	2 Adults 2 Dependent Children	1 Adult 2 Dependent Children	2 Adults (working age)	2 Adults (both 66+)	1 Older Person (66+)	1 Younger Person (working age)
Council Tax	7.8% (£131.56 for Band D property)	Single persons discount (~25%) or Council tax reduction scheme (100% discount or 50% discount) modelled for each Household (HH)	T	£131.56	£131.56	£131.56	£131.56	£131.56	£131.56	£131.56
			M	£65.78 (for lowest income HH)	£65.78 (for lowest income HH)	£0 (for lowest income HH)  £65.78 (for £22,000 income HH)  £98.67 (Single persons discount)	£65.78 (for lowest income HH)	£65.78 (for lowest income HH)	£0 (for lower income bands)  £65.78 (for £22,000 income HH)  £98.67 (Single persons discount)	£0 (for lowest income bands)  £65.78 (for £22,000 income HH)  £98.67 (Single persons discount)
Concessionary home to school transport	£48 per person	Cost can be spread over the academic year	T	£96.00	£96.00	£96.00	-	-	-	-
			M							
			T	£10.40	£10.40	£10.40	£10.40	-	-	£10.40

Car parking charges	10% for 2 hour stay (£0.20)	Blue badge holders can park for free	M							
Grass Routes bus scheme annual membership	£10 per year	None	T	£10.00	-	-	-	£20.00	£10.00	-
			M							
Community meals	£0.90 per meal	None	T	£234.00	-	-	-	£468.00	£234.00	-
			M							
Non-residential Social care fees	20% (£4 per hour)	Total based on 5 hours of care a week	T	£1,040	-	-	-	£1,040	£1,040	-
		Mitigated based on 5 hours or more a week is already at the maximum weekly cost cap of £100, therefore no increase in charge would apply.	M	£0				£0	£0	
Residential street parking permit	10% (£8 per year)	None	T	£8.00	£8.00	£8.00	£8.00	-	-	£8.00
			M							

The table below lists the rationale followed whilst assigning increased costs and mitigations to the households in the table above. A number of methods have been replicated to be consistent with what has been modelled during previous years cumulative financial impact assessments. Although it is recognised that the rationale may not be applicable to all households within the county, the table is an attempt to model how some residents may be impacted to a greater or lesser extent than others.

<b>Fee and Charge</b>	<b>Increase</b>	<b>Rationale for increase</b>
Council Tax	7.8% (£131.56 per Band D property)	7.8% increase on a Band D property as per budget proposal. Mitigations have been added to some households based on income and composition. These include a modelled 25% discount on the 7.8% increase (single persons discount). Applying the possible eligibility for the Council tax reduction scheme to the lower income households, a 50% or 100% mitigated cost has been applied to some households based on the income levels modelled. This is an example only, the scheme is calculated on individual circumstances and the entitlement varies.
Concessionary home to school transport	£48 per person	Cost has been listed against all households with children
Car parking charges	£0.20 - 2 hour stay	Cost has been modelled for a single 2 hour stay per week per household
Grass Routes bus scheme annual membership	£10 per year	Cost has been applied to the households with older people, with a subscription per older person in the household.
Community meals	£0.90 per meal	Model includes costings for 5 meals per week for 52 weeks. Costs are attributed to households with older people, with the 5 meals per week for every older person in the household.
Non-residential social care fees	£4 per hour	Cost have been modelled for 5 hours of care per week, which is consistent with previous cumulative financial impact modelling.  Due to the £100 maximum weekly charge cap, any increase in cost will be mitigated due to the cap being reached - 5 hours at £20 in 2024/25, costs £100 and 5 hours at £24 in 2025/26 would cost £120 which would exceed the cap and therefore the £20 increase would be mitigated.
Residential street parking permit	£8 per year	Cost has been added for a single parking permit per household. Where a household has a grass routes subscription, this charge has not been applied.

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<sup>1</sup> <https://www.monmouthshire.gov.uk/home/counciltaxandbenefits/>

<sup>2</sup> Benefit and pension rates 2025/26 [Benefit and pension rates 2025 to 2026 - GOV.UK](#)

<sup>3</sup> Benefit and pension rates 2025/26 [Benefit and pension rates 2025 to 2026 - GOV.UK](#)

<sup>4</sup> National Minimum Wage Rates [National Minimum Wage and National Living Wage rates - GOV.UK \(www.gov.uk\)](#).

<sup>5</sup> Families and the labour market, 2021 [Families and the labour market, UK - Office for National Statistics \(ons.gov.uk\)](#).

<sup>6</sup> Hours worked by part-time workers [Average actual weekly hours of work for part-time workers \(seasonally adjusted\) - Office for National Statistics \(ons.gov.uk\)](#).

<sup>7</sup> Average household income UK [Average household income, UK - Office for National Statistics \(ons.gov.uk\)](#).

<sup>8</sup> Average (median) gross weekly earnings by Welsh local areas and year [Average \(median\) gross weekly earnings by Welsh local areas and year \(£\) \(gov.wales\)](#).