

## **Evaluating the Potential Impact of the 2023/24 Budget Proposals**

### **Introduction**

We are continually working to understand the Council's financial circumstances and challenges and plan for this in our Medium-Term Financial Plan (MTFP). This has identified areas of significant and growing concern and risk, especially in light of the wider challenging economic climate which is driving inflation and an overarching cost of living crisis. Some services continue to face significant demand led pressures, some continue to operate at below pre-pandemic levels, whilst other services had a level of significant reliance on Welsh Government Hardship funding which has now ended.

The Council needs to make savings and find additional money to meet demands and pressures on services, for example meeting the needs of children who are looked after. In the current financial year, 2022/23, the Council incorporated service pressures of some £10.1m alongside the creation of specific earmarked reserves of £4m. After several years of delivering significant savings from the budget, the means of achieving further reductions becomes increasingly more challenging.

As well as the direct effects of the Covid pandemic, the wider and longer lasting impact on services needs to be continually planned for, such as on homelessness, Children's Services and Adult Social Care, along with wider economic and social factors including increasing inflation, increasing energy costs and the rising cost of living.

The provisional budget settlement from Welsh Government for 2023/24 shows Monmouthshire Council is due to receive £122.490m in core funding, an increase of 9.3%. The final settlement is due in February 2023. The authority continues to receive the lowest funding per head of population of any local authority in Wales. In 2023/24 our draft funding settlement is £1,298 per head of population. This means that a higher proportion of the income we need to generate to provide services needs to come from Council Tax, charges for services and commercial investments. The Council has worked hard to make sure this money goes where it matters.

This settlement goes some way to help respond to the pressure on Council finances and the choices it makes when setting the budget for next year. However, existing circumstances are creating unprecedented challenges for the Council and a budget shortfall of £26.6m has been modelled prior to any intervention for financial year 2023/24. This shortfall will continue to be reviewed based on the latest modelling and updates on assumptions. The scale of the financial challenge is considerable. Whilst the Council is doing all that it can to protect services, the need to reduce costs on such a significant scale will inevitably affect the delivery of services and the shape of the workforce as a significant percentage of the council's budget is made up of employee costs.

We recognise that when we do have to increase charges, put-up Council Tax or change services it can have a detrimental impact on those who use our services, including people who are vulnerable and rely on these services, as well as those who can least afford it. This does not just mean those who are unemployed; many people experience in-work poverty while others are impacted by disability or other protected characteristics that affect their opportunities.

Whenever we introduce changes to policy or increase charges, we evaluate the impact of these upon different groups. Where a budget proposal could alter a service, or the way it is delivered in 2023/24 an Integrated Impact Assessment has been completed. 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 also the people and groups who possess the

protected characteristics specified as part of our duty under the Equality Act 2010. We also look at the potential impact on those in poverty and assess the impact on those experiencing socio-economic disadvantage, in line with the socio-economic duty in Wales.

This document summarises the headline message from these assessments. The table below summarises some of these main impacts while an overview of the messages from these is included as appendix 1. The summary 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.

The document has also drawn on an analysis of the cumulative financial impact of the budget proposals on households with different income levels and groups with protected characteristics as defined by the Equality Act 2010.

Open and robust scrutiny and challenge is essential as the proposals are shaped in line with the priorities in our community and corporate plan and the issues that matter most to our communities. This analysis has been updated following the public engagement exercise and scrutiny undertaken in January and February 2023. Face-to-face and online consultation events have been held as well as an online survey. Full details of the engagement activities and responses are in the appended reports.

**Overview of 2023/24 Budget Saving Proposals with more significant identified impacts**

	Age	Disability	Gender Re-assignment	Marriage or civil partnership	Pregnancy and Maternity	Race	Religion or Belief	Sex	Sexual Orientation	Welsh Language	Socio-Economic	Safeguarding	Sustainable Development	National Well-being goals
SCH 3 - Placement and practice change														
SCH 4 - Children's Service redesign/staffing														
SCH 5 – Staffing reductions to Adults Services														
SCH 6 - Falls and Assistive Technology														
SCH 7 - Learning disabilities - Staffing restructure and team budget saving														
SCH 8 - Adult services - Direct Payment saving														
SCH 9 - Practice and process change adults social care														
SCH 10 – Adults care hours														
SCH 13 - Monmouthshire & Torfaen YOS														
CYP 7 & 8 – Additional Learning Needs														
CYP 9 - Before School Clubs increased charges														
CYP 15 – Education service staff savings														
CYP 12 - Gwent Music service reduction														
CYP 13 – Individual School Budget core reduction														



**Key**

Red – negative impact on this category that is difficult to overcome with mitigating actions

Amber – some potential negative impact which is lower risk or can be managed with mitigation

Green – impact is largely positive

White – no significant impact has been identified at this stage

**Overview of 2023/24 Budget Pressure Proposals with more significant identified impacts**

	Age	Disability	Gender Re-assignment	Marriage or civil partnership	Pregnancy and Maternity	Race	Religion or Belief	Sex	Sexual Orientation	Welsh Language	Socio-Economic	Safeguarding	Sustainable Development	National Well-being goals
SCHPM 1 - Fee uplift on Social Care providers														
SCHPM 3 - Supported living project														
SCHPM 5 – Children & Adults social services recurrent 2022/23 pressures														
CYP 1&6 – Additional Learning Needs pressure and transport														
CYP 4 – Investment in Special Needs Resource Base														
C&PPRES 01 – Passenger Transport pressures														
C&PPRES 02 – Homelessness service pressure														
C&PPRES 03 – Investment in decarbonisation team														
CEOPM1 – Investment in community safety														
RES 3 – Commercial Investments – Service pressure														
DeCarb 1&2 – Energy costs														

**Key**

Red – negative impact on this category that is difficult to overcome with mitigating actions

Amber – some potential negative impact which is lower risk or can be managed with mitigation

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## **Our Community and Corporate Plan and strategic planning**

Following the elections in May 2022 the new administration has been developing a new Community and Corporate Plan that sets the direction for the council and county of Monmouthshire, articulating the authority's purpose, principles and priorities alongside some of the steps we will take to deliver these. The purpose and objectives have been endorsed by Cabinet and a more detailed plan is being developed to be presented to Council.

The document establishes a clear purpose to become a zero-carbon county, supporting well-being, health and dignity for everyone at every stage of life and sets the goals for Monmouthshire to be a:

- Fair place to live where the effects of inequality and poverty have been reduced;
- Green place to live and work with reduced carbon emissions, making a positive contribution to addressing the climate and nature emergency;
- Thriving and ambitious place, full of hope and enterprise;
- Safe place to live where people have a home where they feel secure in;
- Connected place where people feel part of a community, are valued and connected to others;
- Learning place where everybody has the opportunity to reach their potential

The plan has been produced against the backdrop of economic uncertainty with the council facing rising energy prices, inflation and escalating borrowing costs alongside increased demands in areas such as children's services, adult social care, homelessness, additional learning needs and home to school transport. These challenges are on a scale we have not seen before.

We continue to develop our Medium-Term Financial Plan to support us, as far as possible, to continue to deliver the aims and support our longer-term planning. We recognise this is not without challenges and uncertainty. In the context of the financial context set out in the plan, setting a balanced budget for 2023/24 is a significant challenge and involves difficult decisions to allow the council to focus our finite resources to align and deliver the aims and aspirations set out in the Corporate and Community Plan, and within the confines of available funding. The work required needs to involve members and communities as early in the process as possible.

The budget proposals are a broad mix of service adjustments and changes to policy. The proposals contain a number of savings and increases in fees and charges as well as pressures which services need to accommodate so they can sustain themselves into the future. Our strategy gives us the framework to focus on the big challenges but with the unprecedented financial challenge we face it is inevitable, given the range of services the council provides, that there will be an impact on our residents, communities and our own workforce. We also can't lose sight of the cumulative impact of many individual changes, which can also add up to a significant impact on some people within our communities and the need to ensure that there is some degree of mitigation against this for the most vulnerable.



## The Legal Context

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 Council has a requirement under the Act to meet both general and specific duties. The general duties are that in exercising its functions the Council must have due regard to:

- eliminate unlawful discrimination, harassment and victimisation and any other conduct that is prohibited by the Act;
- advance equality of opportunity between people who share a relevant protected characteristic and those who do not;
- foster good relations between people who share a protected characteristic and those who do not;

The Act explains that having due regard for advancing equality involves:

- Removing or minimising disadvantages suffered by people due to their protected characteristics.
- Taking steps to meet the needs of people from protected groups where these are different from other people.
- Encouraging people from protected groups to participate in public life or in other activities where their participation is disproportionately low.

The protected characteristics are: Age; 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. This supports existing commitments such as the Welsh language, equalities and the United Nations Convention on the Rights of the Child.

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 duty on councils to consider the need to reduce the inequalities that result from socio-economic disadvantage.

## **Approach / Methodology**

This paper has been prepared alongside the individual budget proposals for 2023-24 (sometimes referred to as 'mandates'), which each have individual impact assessments, to help assess the overall potential impact of the budget on different people within our communities.

The approach taken in this assessment has been developed in line with the socio-economic duty, to evaluate the potential impact of the 2023-24 budget proposals on those experiencing socio-economic disadvantage and consider how this might help reduce inequalities. We recognise this approach will need to continue to be developed as we further embed the duty in our processes and practice.

As part of the impact assessment, we have established the cumulative financial impact of the budget. It also brings together the most significant issues identified by the Integrated Impact Assessments completed for each of the proposals to understand whether any groups will experience a detrimental position as a result of the cumulative impact of separate proposals.

When any change is looked at in isolation it may not seem significant but the cumulative impact of multiple changes can sometimes mount up, placing pressures on some groups in society.

Monmouthshire has adopted the Joseph Rowntree Foundation definition to define poverty 'When a person's resources (mainly their material resources) are not sufficient to meet their minimum needs (including social participation).' This is supplemented by one of the statistical ways of assessing poverty in the UK; the proportion of households where the income is below 60% of the median income.

This 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.

This enables the authority to 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 and to reduce the potential of disproportionate impacts on groups with protected characteristics as defined by the Equality Act 2010.

As individual budget proposals are developed any further mitigating actions will need to be considered. The assessment in appendix one provides a simple overview where proposals have been identified as having a positive or negative impact on those with protected characteristics, the socio-economic duty, safeguarding and the ways of working and national well-being goals.

Almost any change to a council service has some socio-economic impact. This is because of the nature of our responsibilities and the extent to which some groups, communities and vulnerable people rely on public services. Our aim is to properly understand this impact so that we can identify appropriate mitigations wherever possible and minimise the impact on people in greatest need.

## **The Impact and Mitigation**

### Disability

The definition of disability is when a person has a physical or mental impairment which has a long-term adverse effect on that person's ability to carry out day to day activities. The 2021 Census shows that 19.3% of people who live within the county are classed as disabled under the Equality Act. This is below the Welsh average of 21.1%.

The percentage of people who are disabled in Monmouthshire whose day-to-day activities are limited a lot accounted for 8.2% of Monmouthshire's population, with those whose day-to-day activities are limited a little accounted for 11.1%.

Alongside those who are classed as disabled under the Equality Act, the 2021 Census data shows that 8.2% of people in the county have a long term physical or mental health condition whose day-to-day activities are not limited and therefore not disabled under the Equality Act.

The savings and staffing restructure in the Learning Disabilities (SCH7) Service aims to ensure that appropriate level of staff support is available and that the principle of relevant legislation is applied to each and every care package for people with learning disabilities. While also scoping potential eligibility of Continuous Health Care (CHC) packages.

There will be a 10% reduction in all direct payments (SCH8). While not all direct payment recipients currently use all their allocated money to fund their care, a small proportion some recipients may use all their money and the reduction could result in them not having enough money to pay for their care package. The needs of these individuals will be re-assessed on a case-by-case basis by professionals and, where necessary, their direct payments will be increased to ensure that all care costs can be covered and the individuals will not be disadvantaged.

Process and Practice Change for people with high support needs in adults social care (SCH 9) is focused on tightening or amending practice. This may result in some changes to the provision of care, reduced choice and possible increase in charges for some individuals' care. There is a potential for restricted choice of equipment for residents with specialist care and support needs

Supporting pressures in Adult Social Care (SCHPM5b) and the supported housing project (SCHPM3) will allow those experiencing physical and learning disabilities as well as ill-health, both mental and physical, to continue living independently, access vital services, increase their quality of life and maintain close relationships with family and friends. The proposal to expand the audience of Gilwern outdoor activity centre also presents opportunities to create a unique offer for families with children with disabilities or complex needs and also to special schools who participate in outdoor activities.

There are planned increases in fees for social care services, both residential and non-residential. There is currently a cap on the weekly fees that can be charged for non-residential i.e. domiciliary care. The fees are means tested and there are caps on charges that limit the impact on those on the lowest incomes.

There are also increases in charges for community meals which will impact on Disabled People receiving them.

Reductions in Individual School Budgets (CYP13) may have a negative effect on learners with additional learning needs or learning disabilities. The support provided to these learners will likely decrease as a result of any reduced staffing and the gap between learners with learning

difficulties and those without may increase. The proposal to increase the budget for ALN provision (CYP1) would allow children currently identified as requiring support to continue their current placement.

## Age

Data from Census 2021 shows Monmouthshire has a relatively older population, with those 65 years and older accounting for just over 25% of the total population of the county. This is slightly higher than the Wales average of 21.3%. These age groups also saw the biggest increase in the 2021 census, with the number of people 65 years and older increasing by 26% from 19,043 to 24,000, the highest percentage increase in Wales. Those aged 70-74 saw the largest increase of 44%, followed by the 90+ group which increased by 34%.

Alongside these large increases in older age groups were decreases in the percentage of young people in the county, with the number of children aged 0-14 decreasing by 9.3% to 13,800, significantly more than the Wales average which saw a 1% decrease. There was also a small decrease in the working age population by 3.6% to 55,200. These figures clearly display the shift in Monmouthshire's age demographic to an older, ageing population.

## Older People

People in later life may be more likely to use some council services as they are more likely to acquire a disability and so may be more vulnerable than the general population to changes in those services. This impact will be worsened for those on low incomes. Below is a summary of the main proposals that may impact on some older people.

Older people particularly those with care and support needs such as frail, elderly people, people with physical and mental disabilities and people with chronic health needs and their carers are more likely to be negatively impacted by proposed savings in adult social care. This includes staffing reductions in Adults social care (SCH5) for which likely impacts include a decrease in the number of statutory assessments of needs carried out and reduced thresholds for access to care and support. Also, Process and Practice Change for people with high support needs in adults social care (SCH 9) is focused on tightening or amending practice. This may result in some changes to the provision of care, reduced choice and possible increase in charges for some individuals' care. There is a potential for restricted choice of equipment for residents with specialist care and support needs.

The introduction of a falls prevention and early intervention service (SCH6) will particularly support elderly people in the county. This focus on early intervention and prevention aims to reduce the number of people being placed in nursing/residential care from home or hospital.

Charges for domiciliary care are proposed to increase from £15.10 to £16.62 per hour. These are capped at £100 per week in Wales. However, as these services are means tested 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 and so the impact on those on the lowest incomes will be mitigated.

There is an increase in charges for community meals from £4.50 to £4.64 per meal which will impact on older people who receive these meals.

Increasing the cost of the careline service by 50 pence per week to £5.00 (C&P12) may negatively affect older users who use the service. Monmouthshire's charges for the Careline service are already some of the highest in Wales; increasing the prices further may result in some users no longer being able to afford the service and may prevent some from accessing the service altogether.

These savings and increased charges for social care and other support may also have a negative impact on Disabled People.

Reducing staffing levels at community hubs and the contact centre (CEO1-,8,10, 11,15) will reduce service provision that is more likely to be used by older residents who are more likely to use face-to-face and telephone services than digital channels. While the service is reduced it will be maintained ensuring a level of service provision and access is provided.

## Children and Young People

Continued economic and social pressures on families are likely to put increased pressure on some families.

Reducing the Individual School Budget by 2.8% (CYP13) is likely to result in staff being made redundant. This will likely include mostly non-teaching staff but could also include some teachers where statutory ratios can be met. A reduction in staff could have a negative effect on standards for children and young peoples' learning in our schools and the ability of schools to deliver the new curriculum and subject choice.

Increasing the cost of before school clubs for learners not eligible for free school meals (CYP9) may mean that some families are no longer able to afford the service and some learners may no longer attend as a result.

Reverting to statutory free school transport distance (PTU 2) will result in more learners losing access to free school transport and having to make their own travel arrangements.

Efficiencies in Monmouthshire and Torfaen Youth Offending Service will help ensure appropriate local youth justice services (SCH13). With the related savings it is not known what impact the current cost of living challenge will have upon the communities we support and in turn the pressure this will have upon service provision and as a result of the proposed restructuring the service may potentially be unable to meet demand and responsibilities for young people.

Children's services support circa 1,000 children at any one time. The majority of these children will have experienced a range of adversity including poverty, housing insecurity, parental substance misuse, parental mental ill-health or domestic abuse. Supporting budget pressures in Children Services (SCHMPM5a) will enable Children's Services provide children and families with vital services helping families achieve positive outcomes and supporting children to remain living safely with family and community wherever possible.

Further to this, Placement and Practice changes in Children's Social Services (SCH3) aim to place financial planning at the core of children's care planning as a driver which supports social work values and best interests by ensuring that children's longer-term outcomes are properly considered and planned for. This will aim to make savings by becoming more efficient and developing provision to meet children and young peoples' needs in Monmouthshire.

Children's Social Care Service re-design/staffing changes (SCH4) will develop and expand the Family Time service, a service area which offers single issue supervision to children and a wrap round family supervision in order to keep families together whilst in crisis, investigation or assessment processes. It also seeks to review current structures within Children Services and meet the responsibility for cost avoidance and cost savings. Service areas that have seen demand increasing include: Child Protection, Safeguarding, court and the needs of the

Children Looked After, these are significant and are part of the Council's statutory responsibility. Where a reduction in capacity is proposed the loss of any staffing resource will put pressure on other areas and is likely to increase challenges within the remain workforce and the delivery of services to children and young people.

## Sex

A number of proposals include reducing staffing, through vacant posts or possible redundancies. Around 75% of the workforce in local government are female so any redundancy could impact disproportionately on females. It will be important to ensure that the council's Protection of Employment Policy is adhered to all times.

Females tend to live longer than males so are proportionately more likely to be affected by changes in services that have a disproportionate impact on older people. Women are more likely to be in low paid jobs than men and so a higher proportion are likely to experience the effects of price increases on services.

Women are more likely to be victims of domestic violence so will benefit from the proposed investment in community safety and increased capacity to support victims and survivors of domestic sexual violence.

## Other protected characteristics

We continue to look at national information and relevant studies to improve our knowledge and understanding of how changes can adversely impact on these groups.

Data from the Census 2021 shows 96.9% of Monmouthshire residents identified their ethnic group within the White category. Within the White ethnic group, 94.2% identified their ethnic group as "English, Welsh, Scottish, Northern Irish or British". The next ethnic group was Asian, Asian British or Asian Welsh accounting for 1.3% (1,185) of Monmouthshire's population, while people identifying as mixed or multiple ethnic groups make up 1.2% (1,115) of Monmouthshire's population.

A decreasing number of Monmouthshire residents described themselves as Christian, from 62.5% (57,101) in 2011 to 48.7% (45,250) in 2021, although Christian remains the most common response. 43.4% (40,311) of residents reported no religion, an increase from 28.5% (26,018) in 2011. 0.6% (519) of people in Monmouthshire reported 'any other religion'; 0.5% (435) Muslim; 0.4% (339) Buddhist; 0.2% (204) Hindu; 0.1% (102) Sikh and 0.1% (79) Jewish.

The census 2021 also shows 43.2% (40,155) of people in Monmouthshire are married or in a civil partnership, of which 0.3% (322) were in same-sex couples. 24.3% (22,635) of people had never married or never registered a civil partnership. 8.6% (7,952) of people were divorced or their civil partnership had been dissolved; 1.7% (1,540) were separated; and 6.4% (5,958) were widowed or the surviving partner of a civil partnership. (The question did not apply to the remaining 15.8% of people)

There has been limited impact identified on some of the other protected characteristics: Marriage and civil partnership, pregnancy and maternity, Sex, race, gender reassignment, sexual orientation, religion and belief. Some of the impacts identified include:

Investment proposed in tackling anti-social behaviour and issues, such as substance misuse, sexual violence, and exploitation (CEOPM1); will support the wellbeing of our communities &

citizens. The community safety & Violence Against Women, Domestic Abuse & Sexual Violence (VAWDASV) agendas seek to protect and support victims and survivors of crime, abuse and those deemed most vulnerable in our society.

Supporting pressures in Adult and Children's social services (SCHMPM5a&b) will help support the well-being of residents who require these services. Although savings proposed will impact the provision of some social care services on which people rely.

The reason these protected characteristics may have limited reference include: because these groups are not affected by the proposals or our services provide inclusive services to all residents or because we do not have information on the protected characteristics of all service users. The impact assessment has been made available as part of the consultation process on the budget and we welcomed any views on the impacts of our proposals on these protected groups.

## Socio-economic Impact

Any increase in fees and charges for services will have a higher impact on households on the lowest incomes. Data from the 2021 census shows households were considered to be deprived if they met one or more of the following four dimensions of deprivation: employment; education; health and disability; and housing. While Monmouthshire compares favourably against other Welsh local authorities with the highest percentage of households not deprived in any dimensions (51.7%). However, when looking at smaller areas, there are marked variations in deprivation between communities within Monmouthshire, for example, the percentage of households not deprived in any dimensions varies from 65.4% in The Elms to 35.4% in parts of Overmonnow. In many ways, living in an area of relative affluence and wealth whilst struggling to make ends meet can make that experience even harder and more isolating. This is Monmouthshire's particular challenge and one that we are determined to understand and address

For families on lower incomes the rising cost of living, including - rising energy prices, the increased cost of fuel, rising food prices and increasing inflation - risks adding additional financial pressures to households. All residents will be impacted upon by inflation which will result in higher prices. The rate of inflation was 10.1% in January 2023; recent monthly rates are the highest for over 40 years.<sup>1</sup>

The extent to which higher prices are offset by wage rises will vary by household and is not included within this assessment. For context the rate of annual pay growth in average total pay (including bonuses) was 5.9% and growth in regular pay (excluding bonuses) was 6.7% among employees in October to December 2022.<sup>2</sup> In real terms (adjusted for inflation), in October to December 2022, total pay fell by 3.1% and regular pay by 2.5% on the year<sup>3</sup>. State Pensions and benefits increased by 3.1% for 2022/23, in line with the Consumer Price Index (CPI) for the year to September 2021<sup>4</sup>. For 2023/24 rates will increase by 10.1% in line with the CPI for the year to September 2022.<sup>5</sup> Rising prices will still have a significant effect on claimants.

This also follows financial challenges experienced through the pandemic. Council services are receiving increasing demands and/or complexity of support requirements from residents in the county, such as on homelessness, Children's Services and Adult Social Care. With wider economic and social factors including increasing inflation and the rising cost of living this could mean people, particularly those on lower incomes, needing additional support, including from services already experiencing increases in demand.

Households on variable rate mortgages or taking out new mortgages will have been impacted by the increases in the Bank of England base rate which will have pushed up borrowing costs. Household with unsecured loans and credit card debt will also be adversely affected by this change. There will be benefits to savers which will include those of pensionable age who tend to make up a higher proportion of savers.

We have undertaken extensive data analysis and qualitative research furthering understanding of inequality at a local level and how it affects people's lives. Close working with partners is being undertaken to track data in real time to help understand the emerging situation and act accordingly.



## Mitigation

Some of the mitigation the Council has in place include:

Charges for social services are linked to peoples' ability to pay and service users will be required to undergo a means tested assessment of their financial ability to meet a reasonable charge calculated for these services.

The Council Tax reduction scheme offers some mitigation and is calculated based on individual circumstances, council tax is means tested and those in receipt of universal credit, pension credits, job-seekers allowance and other benefits are able to apply for a reduction. Single person households are eligible for a 25% reduction on Council Tax.

A Monmouthshire discretionary cost of living support scheme has been developed to distribute £498,551 of funding to support those most impacted by the cost-of-living crisis. The scheme has been designed following engagement with national and local partners, and stakeholders and comprises of direct payments and targeted resilience support in the county. This is in addition to the mandatory Welsh Government scheme, which provided funding to local authorities to provide a one-off £150 cost of-living payment to all households in properties in Council Tax bands A to D, and to households in all Council Tax bands who receive support through our Council Tax Reduction Scheme.

The Council is also delivering a range of activities to support residents including the Money Matters campaign. The Council has teamed up with Mind Monmouthshire and Citizens Advice Monmouthshire to set up cost of living support drop-in sessions at schools and leisure centres across the county. These sessions are available to all and offer advice on ensuring people are getting all the money and benefits they are entitled to, making money go further and guidance on managing energy bills. There will also be help and advice on getting back into work or more secure employment as well as emotional and wellbeing support

There will be a range of additional mitigations that are not fully modelled here, further detail will be contained in individual Integrated Impact Assessments completed on proposals.

We provide and help fund a wide range of services in communities to ensure support for communities. These include: community well-being networks to help people to maintain their independence and prevent people becoming dependent on statutory health and social care; Community Hubs that provide advice and host community learning opportunities and the skills at work programme which aims to upskill those in lower paid jobs to increase their career prospects.

## The Cumulative Financial Impact

The impact below has been modelled on some of the planned increases in fees and charges. The proposed Council Tax increase of 5.95% will result in an additional monthly cost of £7.32 on a Band D property.<sup>6</sup> This will impact on all groups, while this modelling has been based on a Band D property those with higher incomes typically live in larger properties and therefore will pay higher Council Tax. However, it is acknowledged that some people may have a large house and low income. This can often be true of older people. Mitigations such as the Council Tax reduction scheme are in place.

To model the cumulative financial impact, we have used five different household types and identified varying annual household incomes for each. The increases in fees and charges modelled to develop this assessment along with further information on the methodology used is shown in Appendix 2.

Household	Income	Total increase after mitigation	Percentage of income
<b>Household 1-</b> 2 Adults, 2 Dependent Children, 1 Older Person	£10,000	<b>£764.51</b>	not applicable
	£15,000		5.1%
	£21,500	<b>£959.51</b>	4.5%
	£40,000		2.4%
	£64,000		1.5%
<b>Household 2 –</b> 2 Adults, 2 Dependent Children	£10,000	<b>£174.47</b>	1.7%
	£15,000		1.2%
	£21,500	<b>£369.47</b>	1.7%
	£40,000		0.9%
	£64,000		0.6%
<b>Household 3 –</b> 1 Adult, 2 Dependent Children	£10,000	<b>£148.50</b>	1.5%
	£15,000		1%
	£21,500	<b>£343.50</b>	1.6%
	£40,000		0.9%
	£64,000		0.5%
<b>Household 4 –</b> 2 Adults	£10,000	<b>£142.47</b>	1.4%
	£15,000		0.9%
	£21,500		0.7%
	£40,000		0.4%
	£64,000		0.2%
<b>Household 5 –</b> 1 Older Person	£10,000	<b>£705.36</b>	7.1%
	£15,000		4.7%
	£21,500		3.3%
	£40,000		1.8%
	£64,000		1.1%

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>7</sup> This is calculated on individual circumstances and the entitlement varies, therefore this has not been modelled as a specific mitigation in the table meaning that many people on lower incomes will not see increases at the levels seen in the

table above. It is unlikely that someone on a low income would be paying for social care. 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.

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

For this household composition fees and charges could increase by £754.51 for those earning £10,000 or £15,000, it is unlikely that a three-person household, with someone of pensionable age, would have an income of £10,000, or £959.51 for those earning £21,500 and above, based on modelled assumptions. Based on an income of £21,500, this would equate to 4.5% of the total income. For households with an income of £40,000 and £64,000 this would be 2.4% and 1.5% of the total income, respectively. The largest increases would be the increased cost of before school clubs (Those eligible for free school meals on lower household incomes will not pay for these clubs which has been factored into the model), and the increase in Council Tax. Social care charges have also been considered for the older person, modelling a £560.04 annual increase based on 5 hours of care a week and the provision of daily community meals.

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

Based on this household composition, fees and charges have been modelled to increase by £174.47 for those earning £10,000-£15,000 or £369.47 for those earning £21,500 and above. This would constitute 1.2% of their income for a household income of £15,000. For a household income of £21,500 it would be 1.7%. The percentage of income would be 0.9% and 0.6% for households with incomes of £40,000 and £64,000, respectively. Alongside the increases noted above for a household with children, charges have been modelled for swimming lessons (+£24 per annum), and a garden waste bag (+£22 per annum).

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

Although the income for this household is likely to be less than that of the 2 Adult, 2 Children household, the increase in fees and charges on the household are very similar, with a modelled £148.50 increase in annual costs for those on £10-15,000 and £343.50 for those on £21,500 and over. For those with a household income of £10,000, this would be 1.5% of total income and for £15,000 it would be 1%. For households with an income of £21,500 this would be 1.6% of the total, while for higher incomes, £40,000 would be 0.9% and £64,000 would be 0.5%. This household qualifies for single person discount on Council Tax, and so the increase is 25% lower than the previous two example households.

#### **Household 4 - 2 Adults**

For this household composition, fees and charges would increase by £142.47 Therefore, this would be 0.9% of the total if this household composition had an income of £15,000. A household earning £21,500 would be 0.7% of their income. Those earning higher incomes such as £40,000 and £64,000 the fees and charges would account for 0.4% and 0.2% of their annual income. 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 - 1 Older Person**

This household could potentially see an increase of £705.36. This would be the equivalent of 7.1% of a household income of £10,000, which is slightly above the annual state pension allowance. The impact would be 4.7% if the household income is £15,000 and 3.3% and 1.8%

if the household income is £21,500 and £40,000. Again, this household qualifies for single person discount on Council Tax and so the increase is £65.90 rather than £87.87. This household would potentially incur the increased costs for adult's social care, as modelled for household 1, and an increase in the cost of allotment plots has also been modelled.

Appendix 1



monmouthshire  
sir fynwy

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

<p><b>Name of the Officer:</b> Richard Jones</p> <p><b>Phone no:</b> 01633 740733 <b>E-mail:</b> richardjones@monmouthshire.gov.uk</p>	<p><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.</p>
<p><b>Name of Service area:</b> Chief Executive's</p>	<p><b>Date:</b> 16<sup>th</sup> February 2023</p>

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.

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Age	Local authorities provide many universal services such as highways and waste collections which bring multiple benefits to all age groups. However, many of our services are delivered to proportionately higher numbers of younger and older people.	Staffing reductions and reductions in the hours of care provided in Adults Social Care (SCH5, SCH10) will negatively impact people with care and support needs such as frail, elderly people, people with physical and mental disabilities and people with chronic health needs and their carers.	Ensure the Social Services and Well-being Act charging legislation is adhered to, so service users are means tested to determine their ability to pay.  Increased demand, the fragility of the social care sector and the availability of

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
	<p>The introduction of a fall's prevention and early intervention service (SCH6) will particularly support elderly people in the county.</p> <p>A fee uplift for social care providers (adults and children) (SCHPM1) will mean that the Council is able to maintain more care for adults, children and vulnerable people of all ages. The increase in costs also includes the implementation of the real living wage for all care staff which will benefit people of all ages</p> <p>Supporting budget pressures Children Services (SCHMPM5a) will enable children and families to be provided with vital services helping families achieve positive outcomes and supporting children to remain living safely with family and community wherever possible.</p> <p>Placement and Practice changes proposed in Children's Social Services (SCH3) delivery plan will impact positively on children and</p>	<p>Increasing the cost of the careline service (C&amp;P12) may result in some older users, who are reliant on the service, no longer being able to afford it, and also will prevent some from accessing the service completely.</p> <p>Process and Practice Change for people with high support needs in adults social care (SCH9) may result in some changes to the provision of care and possible increase in charges for some individuals' care.</p> <p>Placement and Practice changes proposed in Children's Social Services (SCH3) may result in a short-term negative impact in realigning the service and young people moving homes.</p> <p>Where capacity has been identified for reductions in Children services (SCH 4), the loss of any staffing resource will put pressure on other areas and is likely to increase challenges within the remaining workforce and the delivery of services to children and young people.</p>	<p>care staff remains a key risk for adults social care which needs to be considered as part of budget proposals in adult social care, although some of these issues are outside the Council's direct control to address.</p> <p>All cases in the Youth Offending Service (SCH 13) will be assessed on a case-by-case basis.</p> <p>The review of cases in children's social care (SCH 3) will on a case-by-case basis and will be supported by the multi-agency Complex Care meetings.</p> <p>Develop and expand the Family Time Service (SCH 4), a service area which offers single issue supervision to children and a wrap round family supervision in order to keep families together whilst in crisis, investigation or assessment processes.</p> <p>Provide earlier help and prevention services that seek to prevent children coming into care, although demand can impact on the ability to achieve</p>

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
	<p>family reviewing, identifying and commissioning/ developing services to support the needs of children and families.</p> <p>Children’s social services (SCH4) will develop and expand the Family time service. The delivery plan will impact positively on children and families.</p> <p>Monmouthshire and Torfaen Youth Offending Service is looking at reducing staff travel expenses and accommodation costs, as well as reduction in core budget (SCH13). This will enable the service to make efficiencies. Although it may be unable to meet any future increase in demand.</p> <p>Increasing the budget for ALN provision (CYP1) will ensure that all pupils currently identified as requiring support to continue in their current placement. The proposal will support pupils up to the age of 18.</p> <p>Providing additional funding to meet increased demand for home to school</p>	<p>Reducing the Individual School Budget by approximately 2.8% (CYP13) will likely result in some staff being made redundant, which will have an impact on school standards for children and young people, the number of courses available and class sizes.</p> <p>Increasing the cost of before school clubs for learners not eligible for FSM (CYP9) will mean that some families are no longer able to afford the service and learners can no longer attend.</p> <p>The reduction in Monmouthshire’s contribution to Gwent Music could mean that the prices of music lessons increase (CYP12). This could mean that they are no longer affordable for some families and will result in some children no longer able to receive music lessons.</p> <p>Reverting to statutory free school transport distance (PTU 2) will result in some learners losing access to free school transport and having to make their own travel arrangements.</p>	<p>this, and provide services that seek to repatriate children into community or family placements (e.g. MyST, Monmouthshire Families Together).</p> <p>The increased cost for before school clubs will only apply to the first child of a family that is attending (CYP9).</p> <p>Reduced staffing levels at community hubs and in the contact centre (CEO1- ,8,10,11,15) will enable the council to continue to maintain delivery of core services to a wide range of people who are vulnerable or need support at key stages of the life course.</p> <p>Where any decisions are required relating to 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>

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
	<p>transport (C&amp;PPRESS01) means that learners are able to get to school safely and securely at no cost.</p> <p>The expansion of the offer available at Gilwern outdoor activity centre (ML22) will allow more children to experience and learn in an outdoor setting.</p> <p>Providing good quality, temporary accommodation has the potential to benefit people of all ages (C&amp;PPRESS02).</p> <p>The continuation of the supported housing project (SCHPM3) will allow these young adults with complex disabilities to continue living within the county and near their families.</p>	<p>Charging for additional events or activities at museums or attractions (ML11) could result in people of all ages being excluded on grounds of affordability, for example families with children.</p> <p>There will be an increase in charges of 10.1% for both residential and non-residential social care. There is also a 10.1% increase in charges for community meals. This will have a disproportionate impact on older people.</p> <p>Reduce staffing levels at community hubs in order to reduce costs and reduced staffing in the contact centre (CEO1-,8,10, 11,15) will reduce service provision that is more likely to be used by older residents. While the service is reduced it will be maintained ensuring a reduced level of service provision is provided.</p>	
Disability	Savings and Staffing restructure in the Learning disabilities service (SCH7) aim to ensure that appropriate level of staff support is available and that the principle of relevant legislation is applied to each and every care	There will be a 10% reduction in all direct payments (SCH8). Some recipients may use all their money and the reduction would result in them not having enough money in their account to pay for their care package.	The needs of these individuals (SCH8) will be re-assessed on a case-by-case basis by professionals and, where necessary, their direct payments will be increased to ensure that all care



Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
	<p>package for people with learning disabilities.</p> <p>Children who live with a disability requiring Youth Offending Service support (SCH 13) will have support tailored to their needs by a multiagency approach to consider their holistic needs.</p> <p>The expansion of the offer available at Gilwern outdoor activity centre (ML22) will allow the service to create a unique offer for families with children with disabilities or complex needs and also to SEN schools who participate in outdoor activities.</p> <p>Increasing the budget for ALN provision (CYP1) will ensure that all pupils currently identified as requiring support to continue in their current placement.</p> <p>Supporting pressures in Adult and Childrens Social Care (SCHPM5, SCHPM3) will allow those experiencing physical and learning</p>	<p>Process and Practice Change for people with high support needs in adults social care (SCH 9) is focused on tightening or amending practice. There is a potential for restricted choice of equipment for residents with specialist care and support needs.</p> <p>Increasing the cost of the careline service by 50 pence per week (C&amp;P12) may result in some users no longer being able to afford the service and preventing some from accessing it all together.</p> <p>Reduction in funding and staff levels in schools and services across the county (CYP13) will mean that the support provided to children with additional learning needs or learning disabilities will be likely to decrease which could have a detrimental impact on the learning and progressions of these children.</p> <p>Any changes to social care arrangements are likely to have a particular impact on disabled people; this includes increased charges as described above.</p>	<p>costs can be covered and the individuals will not be disadvantaged.</p> <p>For social care charging increases, we will ensure that service users are means tested to determine their ability to pay.</p> <p>Where any decisions are required relating to 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>

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
	<p>disabilities as well as ill-health, both mental and physical, to continue living independently, have access to vital services, increase their quality of life and maintain close relationships with family and friends.</p>	<p>There will be an increase in fees and charges for both residential and non-residential social care, and community meals.</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 decisions are required relating to 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>
Marriage or civil partnership	<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>At this stage proposals haven't identified a particular overall impact, either positive or negative.</p>	<p>None identified at this stage</p> <p>Where any decisions are required relating to 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>

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Pregnancy or maternity	<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 the period of 26 weeks beginning with the day on which she gives birth.</p> <p>At this stage proposals haven't identified a particular overall impact, either positive or negative.</p>	<p>At this stage proposals haven't identified a particular overall impact, either positive or negative.</p>	<p>None identified at this stage</p> <p>Where any decisions are required relating to 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>
Race	<p>At this stage proposals haven't identified a particular overall impact, either positive or negative, that will differ by race.</p>	<p>At this stage proposals haven't identified a particular overall impact, either positive or negative, that will differ by race.</p>	<p>None identified at this stage.</p> <p>Where any decisions are required relating to 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>
Religion or Belief	<p>At this stage proposals haven't identified a particular overall impact, either positive or negative.</p>	<p>At this stage proposals haven't identified a particular overall impact, either positive or negative.</p>	<p>None identified at this stage</p>
Sex	<p>The council has already carried out a full pay evaluation exercise.</p>	<p>A number of proposals include reducing staffing, through vacant posts or possible redundancies. Around 75% of the workforce in local government are female so any redundancy is more likely to impact disproportionately on the female sex.</p>	<p>It will be important to ensure that the council's Protection of Employment Policy is adhered to all times.</p> <p>Ensure that opportunities for redeployment and explored to</p>

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
			<p>minimise the risk of compulsory redundancy.</p> <p>Where any decisions are required relating to 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>
Sexual Orientation	At this stage proposals haven't identified a particular overall impact, either positive or negative.	At this stage proposals haven't identified a particular overall impact, either positive or negative.	<p>None identified at this stage</p> <p>Where any decisions are required relating to 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 introduction of a fall's prevention and early intervention service (SCH6) will be accessible to all residents in the county who require it.</p> <p>Placement and Practice changes proposed in Children's Social Services (SCH3) supports the return of young people back to Monmouthshire from Out of County placements and supports resilience building with family networks and parents to allow young people to return home or live in their home communities.</p> <p>Supporting budget pressures in Children Services (SCHMPM5a) will enable Children's services to continue to support children in the county, the majority of these children will have experienced a range of adversity including poverty, housing insecurity,</p>	<p>Staffing reductions in Adults social care (SCH 5) will negatively impact people with care and support needs These people are often the most marginalised, have lower levels of socio-economic wellbeing and poorer health outcomes.</p> <p>Increasing the cost of the careline service by 50 pence per week (C&amp;P12) may result in some users no longer being able to afford the service and preventing some from accessing it all together.</p> <p>Reverting to statutory free school transport distance (PTU 2) will result in more learners losing access to free school transport and having to make their own travel arrangement which may have a disproportionate impact on those on lower incomes who are not able to pay for transport for their</p>	<p>Kinship Carers are eligible for financial support to increased care responsibilities (SCH 3)</p> <p>The accessibility of charged events will be monitored and those not able to pay will be supported through grant funding/concessionary rates (ML11).</p> <p>Families with children who are eligible for Free School Meals (FSM) will not need to pay the increased cost for before school clubs (CYP9). This increased cost also only applies to the first child of a family that is attending. Families on low-income who are not eligible for FSM will have to pay the increased cost.</p> <p>(C&amp;P 28) Blue Badge holders will continue to be able to park for free.</p>

	<p>parental substance misuse, parental mental ill-health or domestic abuse.</p> <p>Supporting pressures in Adult social care (SCHMPM5b) will enable services to be provided to people with caring responsibilities and those people made more vulnerable because of inequality or their social-economic situation (for example families / individuals experiencing housing, poverty, domestic abuse of substance misuse issues).</p> <p>It is hoped that a fees uplift to social care providers (adults and children) (SCHPM1) will allow socio-economically disadvantaged older people to have more places available to them and more choice of where they would like to go.</p> <p>The continuation of the supported housing project (SCHPM3) will provide support for young adults with complex physical and learning disabilities. These young adults are unable to gain employment due to their high levels of disability, and so this project allows them to live independently and safely. It also means that the parents of these young adults are able to gain employment if they wish.</p> <p>The provision of temporary accommodation (C&amp;PPRESS02) will</p>	<p>children or are able to take the children to school themselves</p> <p>.</p> <p>The reduction in Monmouthshire's contribution to Gwent Music could mean that the prices of music lessons increase (CYP12). This will result in some families no longer being able to afford lessons and therefore will exclude some learners and mean that peers in school do not have the same opportunities.</p> <p>Increasing the cost of before school clubs from £1 to £2 (CYP9) for the first child in a family attending could have a disproportionate effect on low-income families. This can be a considerable expense for some families, and if working families cannot afford to pay, they may need to change working hours or find alternative childcare.</p> <p>Fee increases for car parking of approximately 15% (C&amp;P 28) will affect shoppers and visitors to Abergavenny, Chepstow and Monmouth</p> <p>Telephone services (CEO1-,8,10, 11,15) enable those who do not have a car or who are digitally excluded to access services. These people are more likely to be on low incomes.</p>	<p>It will be important to ensure that the council's Protection of Employment Policy is adhered to all times. Ensure that opportunities for redeployment are explored to minimise the risk of compulsory redundancy.</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>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 the cumulative financial impact of the budget.</p>
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	<p>benefit those experiencing socio-economic disadvantage. The provision of good quality temporary accommodation will also support wider priorities such as health and well-being.</p> <p>The proposal for additional capacity for work related community safety &amp; Violence Against Women, Domestic Abuse &amp; Sexual Violence (VAWDASV) agendas seeks to protect and support victims and survivors of crime, abuse and those deemed most vulnerable in our society. (CEOPM1).</p> <p>Providing additional funding to meet increased demand for home to school transport (C&amp;PPRESS01) means that all learners have equal access to education regardless of their socio-economic status.</p> <p>Introducing a Council Tax premium for second homes (Fin 2) potentially helps to reduce the number of second homes in the county, allowing more homes for local people. Although second homes are a relatively small proportion of homes in the county.</p> <p>Commercial investments (RES3) will hopefully create economic growth in the area, resulting in more jobs and opportunities.</p>	<p>Reductions in the service availability will have a disproportionate impact on these groups.</p> <p>Second homeowners generate income to the local community which could be reduced with the introduction of a council tax premium for second-home owners (FIN 2).</p> <p>Commercial investments (RES3) should create economic growth in the area, resulting in more jobs and opportunities. Although commercial investments are currently an identified budget pressure</p> <p>A number of proposals include reducing staffing, through vacant posts or possible redundancies. This will have a socio-economic impact on those council employees affected.</p> <p>An increase in Council Tax will have a financial impact on all households. Those on lower incomes, as any bills will form a higher proportion of their household expenditure, will feel the impact more acutely.</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 inequality.</p>	
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### 3. Policy making and the Welsh language.

<b>How does your proposal impact on the following aspects of the Council's Welsh Language Standards:</b>	<b>Describe the positive impacts of this proposal</b>	<b>Describe the negative impacts of this proposal</b>	<b>What has been/will be done to mitigate any negative impacts or better contribute to positive impacts</b>
<b>Policy Making</b> Effects on the use of the Welsh language, Promoting Welsh language Treating the Welsh language no less favourably	<p>A continued focus on Welsh translation will ensure we can continue to comply with the Welsh Language Standards.</p> <p>All proposals will comply with the Welsh Language standards applicable to the authority</p>	None identified	All signage and material arising from budget proposals will be compliant with the Welsh Language (Wales) Measure 2011 and Welsh Language Standards.
<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>An increase in capacity and expertise in the council's Welsh language function will help ensure that all areas of work are carried out in accordance with Welsh language requirements.</p>	None identified	<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>



<p><b>Service delivery</b> Use of Welsh language in service delivery Promoting use of the language</p>	<p>Growing Welsh medium education through the funding of a seedling provision, as an extension of an existing Welsh-medium school in Monmouth in September 2023.</p> <p>Increases in our ability to recruit Welsh speakers will ensure increased ability for service users to use the language in their dealings with the council.</p>	<p>Budget proposals identify a number of potential redundancies. In some instances these could result in reduction in the number of Welsh speakers employed.</p>	<p>The expansion of Welsh-medium primary education in Monmouthshire is a key action that will enable us to achieve Welsh Ministers target of 115 pupils per cohort by 2032.</p> <p>As part of the council's Welsh Language Strategy, we will continue to grow the number of Welsh speakers in the workforce, resulting in a net increase, through recruitment and training.</p> <p>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.</p>
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**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>A number of mandates involve redundancies, which will overall reduce the number of jobs in the county.</p>	<p>Wherever possible, posts that are deleted will be vacant posts, thus reducing the number of 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>Some proposals e.g. reduction in workforce development work in social services (SCH12), reducing library book purchases (CEO08) may reduce opportunities for training and education.</p> <p>There will be increased adult education opportunities which make a positive contribution to increasing skills. (CEO10)</p> <p>(RES19) involves removing a very small pot of WG funding for business rate relief, but this was considered too small to be of real benefit to Monmouthshire businesses.</p>	
<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>ML1 and 2 will increase biodiversity and nature recovery work. C&amp;P8 will also improve biodiversity by managing more land for pollinators.</p>	<p>Although this work is positive, in order to be able to maintain or expand this work some of the proposals increase reliance on grant funding streams, which is not a long term solution. Efforts will therefore be needed to find additional grant funding or core funding for some of this work to be able to continue longer term.</p>
<p><b>A healthier Wales</b> People's physical and mental wellbeing is maximized and health impacts are understood</p>	<p>Many of the proposals have a significant impact on people's physical and mental health and wellbeing, whether this is through the provision of care services, working with children with additional needs, encouraging access to the countryside, active travel or leisure services.</p> <p>On the whole, proposals are all aiming to improve health and wellbeing (e.g. falls prevention, better provision for additional needs etc). However, some of the proposed savings may have a</p>	<p>As with many of the budget proposals managers are aiming to reduce negative impacts on health, whilst ensuring that core services are able to continue, albeit with a reduced level of service, reduced hours or the seeking of grant funding to ensure services can still be delivered.</p> <p>Increased demand, the fragility of the social care sector and the availability of care staff remains a key risk for adults social care.</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>negative impact e.g. SCH5 reductions in Adults social services.</p> <p>And others will be increasingly reliant on grant funding e.g.ML13 Sports development.</p> <p>In addition, the mental health impact on staff at risk of redundancy needs to be taken into account.</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, employment and skills support etc</p>
<p><b>A Wales of cohesive communities</b> Communities are attractive, viable, safe and well connected</p>	<p>Several proposals have a positive impact on cohesive communities, since they enable children with additional needs, young people with complex needs to be able to be educated and live in their local communities by reducing the need to travel further afield or out of county (CYP4 PM, SCHPM3)</p> <p>CEOPM1 aims to increase support for community safety. PTU1 aims to improve walking and cycling routes, which improve safety and connectivity within communities.</p>	<p>None identified.</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>Several proposals make a positive contribution to reducing carbon emissions from our buildings through energy savings and renewables installation (Decarb 1&amp;2, RES3). Other proposals will reduce transport related emissions such as enabling children and young people with additional needs to get the support they need within their local community, rather than travelling out of county, reducing grey fleet mileage and rationalizing fleet (TRANS1&amp;2). However, some</p>	<p>PTU1 will improve walking/cycling routes to school to help mitigate the impact of PTU2</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?
	proposals may increase transport related emissions by increasing the distances pupils have to walk/cycle to school or increasing travel costs, if parents resort to driving (PTU2). Increasing charges for green waste collection may reduce participation.	
<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>	There are number of proposals impacting on culture and heritage. Introducing a small charge for some events may reduce uptake, but will allow for a wider range of cultural activities to take place (ML11). Some proposals will result in a small reduction in the hours that cultural and heritage opportunities are open (e.g. ML7,8,9&21 Chepstow TIC). The reduction in the budget available for library books will have a negative impact (CEO08)	<p>In order to reduce the impact of proposals, cultural, heritage and sports opportunities are still being maintained, with only minimal reductions in opening times. Charges for some events are being kept to £2, in line with feedback from users. Any new vacancies that are part of proposals are assessed and where possible advertised as 'Welsh essential' to increase people opportunities to engage with the council through the medium of Welsh.</p> <p>We will look to protect the level of library book spend allocated to Welsh language publications.</p>
<p><b>A more equal Wales</b> People can fulfil their potential no matter what their background or circumstances</p>	Many of the proposals do include impacts on some protected characteristics, in particular age and disability. These impacts (positive and negative) are examined in more detail in the protected characteristics section above. There are also impacts on those on low incomes as a result of charge increases or introductions and these are examined in more detail in the socio-economic duty section above.	<p>Wherever possible charges are kept to a minimum or are means tested (e.g. ML11 charges for events, CYP9 waiving before school charges for those on free school meals) to reduce impact on low income families.</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, employment and skills support etc</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?
	Consideration will need to be given to whether redundancies will affect any particular groups of people.	

**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>Long Term</p> <p>Balancing short term need with long term and planning for the future</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 directorate, but particularly in MonLife, there is an increasing reliance on grant funded posts and projects, which is inevitably only helpful in the short term.</p>	<p>Wherever possible, proposals are only reducing service levels (e.g. by reducing opening hours or staffing) rather than closing services, in order to ensure that core services can still be continued in the long term.</p>
 <p>Collaboration</p> <p>Working together with other partners to deliver objectives</p>	<p>For many of the budget proposals, partnership working is key to being able to continue delivering services. However, there are also proposals to scale back some aspects of partnership working, which could reduce the viability of some of these partnerships and service levels received (e.g. SCH11, CYP10, CYP12)</p>	<p>Generally proposals that scale back partnership work still continue with those collaborations, with reduced financial contributions that we are able to make.</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>Involvement views</p> <p>Involving those with an interest and seeking their views</p>	<p>Individually, many 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>Overall, these proposals will form part of the budget consultation and will be subject to a public consultation exercise.</p>	<p>Ensure that proposals and the accompanying Integrated Impact Assessments are updated as a result of any further consultation and engagement.</p>
 <p>Prevention</p> <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. PTU1 will increase walking and cycling and reduce future ill health, SCH6 should reduce falls, preventing the need for hospital admissions.)</p> <p>With the scale of savings that are needed, some proposals will be taking investment out of preventative work which may lead to further problems in the future. Examples of this include: SCH5 reducing Adult Services workforce and SCH13 reducing the Youth Offending Service.</p>	<p>Wherever possible, posts that are already vacant are those that are being deleted, meaning that the impact of those are less. However, across the council teams are already under pressure, and not replacing vacant posts will mean that we are likely to be less able to be proactive and preventative and are more likely to be reactive. Increased demand, the fragility of the social care sector and the availability of care staff remains a key risk for adults social care. although some of these issues are outside the Council's direct control to address.</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 data-bbox="237 600 376 632"><b>Integration</b></p> <p data-bbox="203 655 566 762">Considering impact on all wellbeing goals together and on other bodies</p>	<p data-bbox="589 355 1312 568">The council works across multiple areas and many of these proposals can have positive and potentially negative impacts on 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 data-bbox="1335 355 2022 603">The council's developing Community and Corporate Plan contains a table which highlights the impacts of the plan on each of the seven national well-being goals. Any detailed proposals brought forward following the consultation will need to assess the impact of that proposal on the well-being goals and the sustainable development ways of working.</p>

**6. Council has agreed the need to consider the impact its decisions has 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 on 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	The council has a responsibility to children who are looked after. The council has a corporate duty to consider looked after children 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 each of the 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 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 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. This does not highlight every single issue but reveals some of the key impacts of budget proposals and provide 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.

<b>What are you going to do</b>	<b>When are you going to do it?</b>	<b>Who is responsible</b>
Existing actions have been identified within the individual assessments.	As per budget proposals	As per budget proposals

**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 in 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>
1.0	Cabinet	18/1/23	
2.0	Cabinet	1/3/23	Updated following the budget consultation alongside the final budget proposals

## **Appendix 2 – Cumulative Financial Impact methodology**

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

Household composition data from the Census 2021 in Monmouthshire shows for each of our 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 –household: with dependant children.

Household 2 - 2 Adults, 2 Dependent Children – 17% (7033) of all household composition households from Census 2021 were for a single family household (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 for a single family household (lone parent) with dependent children.

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

Household 5 - 1 Older Person – 16% (6534) of all household composition households from Census 2021 were for a 1 person household, aged 66 years or older.

Data on income levels will continue to change as wage levels vary, the figures used provide an approximate indication. 60% of the median income of the UK is commonly used as a means to define whether a household is in poverty or not. Using a range of approximate income levels as part of the modelling provides an indication of the potential impacts on households.

The full rate of the new state pension for 2022/23 is worth £185.15 per week, this constitutes an annual figure of £9,628. This is due to rise to £203.85 per week in 2023/24, £10,600 a year. For single adult households without children the annual benefits cap is £13,400 due to rise to £14,753 in 2023/24. The Annual level of Benefit cap for couples (with or without children) or single claimants with a child of qualifying age is £20,000, due to rise to £22,020 in 2023/24.<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.

Fee/Charge	Fee Increase	Household 1 – 2A, 2C, 10P	Household 2 – 2A, 2C	Household 3 – 1A, 2C	Household 4 – 2A	Household 5 – 10P
Council Tax	£87.87 (Avg Band D)	£87.87	£87.87	£65.90	£87.87	£65.90
Careline	£0.50 per week	£26				£26
Before School Club	£1 increase a day	£195	£195	£195		
Residential car permit	£9 per annum	£9	£9	£9	£9	£9
Car Parking Charges	£0.30 for 2 hour stay each week	£15.60	£15.60	£15.60	£15.60	£15.60
Museum Activities/Events	£2 per person	£20	£16	£12	£8	£4
Social care – domiciliary care	£1.51 per hour	£392.60				£392.60
Community Meals	£0.46 per meal	£167.44				£167.44
Garden Waste Bag	£22 per bin	£22	£22	£22	£22	£22
Allotment Plot	£2.82 per plot					£2.82
Swimming Lessons	£1 a month per person	£24	£24	£24		
<b>Total</b>	£10,000 & £15,000	<b>£764.51*</b>	<b>£174.47*</b>	<b>£148.50*</b>	<b>£142.47</b>	<b>£705.36</b>
	£21,500, £40,000 & £64,000	<b>£959.51</b>	<b>£369.47</b>	<b>£343.50</b>		
% of Household Income	£10,000	7.6%	1.7%	1.5%	1.4%	7.1%

	£15,000	5.1%	1.2%	1%	0.9%	4.7%
	£21,500	4.5%	1.7%	1.6%	0.7%	3.3%
	£40,000	2.4%	0.9%	0.9%	0.4%	1.9%
	£64,000	1.5%	0.6%	0.5%	0.2%	1.1%

\*These figures are the total cost minus the £195 cost for the before school club price increase. Families with household incomes of £10,000 and £15,000 would very likely be eligible for free school meals, making them exempt from this cost increase.

## References

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<sup>1</sup> CPI, Release date 15 February 2023, available at <https://www.ons.gov.uk/economy/inflationandpriceindices>

<sup>2</sup> Average weekly earnings in Great Britain: February 2023

<https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/bulletins/averageweeklyearningsingreatbritain/february2023>

<sup>3</sup> Average weekly earnings in Great Britain: February 2023

<https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/bulletins/averageweeklyearningsingreatbritain/february2023>

<sup>4</sup> <https://www.gov.uk/government/news/state-pension-and-benefit-rates-for-2022-to-2023-confirmed>

<sup>5</sup> <https://www.gov.uk/government/publications/benefit-and-pension-rates-2023-to-2024>

<sup>6</sup> Average Band D in 2022-23 = £1476.79 increasing to £1564.66 in 2023-24. This figure does not include the change for the Police and Crime Commissioner and Community and Town Council precepts. <https://www.monmouthshire.gov.uk/app/uploads/2022/03/Bandings-Template-2022-23-1.pdf>

<sup>7</sup> <https://www.monmouthshire.gov.uk/home/counciltaxandbenefits/>

<sup>8</sup> <https://www.gov.uk/government/publications/benefit-and-pension-rates-2023-to-2024/benefit-and-pension-rates-2023-to-2024>