



monmouthshire  
sir fynwy

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

<p><b>Name of the Officer</b> completing the evaluation Peter Davies</p> <p><b>Phone no:</b> 07398 954 828 <b>E-mail:</b> <a href="mailto:peterdavies@monmouthshire.gov.uk">peterdavies@monmouthshire.gov.uk</a></p>	<p><b>Please give a brief description of the aims of the proposal</b></p> <p>To consider for approval the Council's medium term financial strategy for the period 2024-2029.</p>
<p><b>Name of Service area</b></p> <p>Central Finance, Resources Directorate</p>	<p><b>Date:</b> 24<sup>th</sup> June 2024</p>

<p><b>Are your proposals going to affect any people or groups of people with protected characteristics?</b> Please explain the impact, the evidence you have used and any action you are taking below. <b>Protected Characteristics</b></p>	<p><b>Describe any positive impacts your proposal has on the protected characteristic</b></p>	<p><b>Describe any negative impacts your proposal has on the protected characteristic</b></p>	<p><b>What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?</b></p>
<p>Age</p>	<p>The financial strategy sets out the strategic approach and framework over the medium term for the Council's finances and in ensuring that they fundamentally support the delivery of the objectives and aims set out in the Community and Corporate Plan, and that was subject to its own integrated impact assessment. The strategy looks to ensure that Council's finances are put on a secure and sustainable footing and that delivery of the Council's policy objectives are affordable.</p> <p>Future decisions that impact on the Council's budgetary framework will need to be prudent, sustainable and affordable, and will be the subject of their own Integrated Impact Assessment, including any impacts that relate to specific protected characteristics. This equally applies to the Council's budget process and where budget proposals are subject to their own Integrated Impact Assessment, individually and collectively.</p>	<p>None identified at this stage</p>	<p>None identified at this stage</p>

<p><b>Are your proposals going to affect any people or groups of people with protected characteristics?</b> Please explain the impact, the evidence you have used and any action you are taking below. <b>Protected Characteristics</b></p>	<p><b>Describe any positive impacts your proposal has on the protected characteristic</b></p>	<p><b>Describe any negative impacts your proposal has on the protected characteristic</b></p>	<p><b>What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?</b></p>
Disability	As above	As above	As above
Gender reassignment	As above	As above	As above
Marriage or civil partnership	As above	As above	As above
Pregnancy or maternity	As above	As above	As above
Race	As above	As above	As above
Religion or Belief	As above	As above	As above
Sex	As above	As above	As above
Sexual Orientation	As above	As above	As above

## 1. 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 financial strategy sets out the strategic approach and framework over the medium term for the Council's finances and in ensuring that they fundamentally support the delivery of the objectives and aims set out in the Community and Corporate Plan, and that was subject to its own integrated impact assessment. The strategy looks to ensure that Council's finances are put on a secure and sustainable footing and that delivery of the Council's policy objectives are affordable.</p> <p>Future decisions that impact on the Council's budgetary framework will need to be prudent, sustainable and affordable, and will be the subject of their own Integrated Impact Assessment, including any impacts that relate to socio-economic disadvantage. This equally applies to the Council's budget process and where budget proposals are subject to their own Integrated Impact Assessment, individually and collectively.</p>	None identified at this stage	None identified at this stage

## 2. 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>
<p><b>Policy Making</b></p> <p>Effects on the use of the Welsh language,</p> <p>Promoting Welsh language</p> <p>Treating the Welsh language no less favourably</p>	<p>The financial strategy sets out the strategic approach and framework over the medium term for the Council's finances and in ensuring that they fundamentally support the delivery of the objectives and aims set out in the Community and Corporate Plan, and that was subject to its own integrated impact assessment. The strategy looks to ensure that Council's finances are put on a secure and sustainable footing and that delivery of the Council's policy objectives are affordable.</p> <p>Future decisions that impact on the Council's budgetary framework will need to be prudent, sustainable and affordable, and will be the subject of their own Integrated Impact Assessment, including any impacts that relate to the use of the Welsh language. This equally applies to the Council's budget process and where budget proposals are subject to their own Integrated Impact Assessment, individually and collectively.</p>	<p>None identified at this stage</p>	<p>None identified at this stage</p>
<p><b>Operational</b></p> <p>Recruitment &amp; Training of workforce</p>	<p>As above</p>	<p>As above</p>	<p>As above</p>



<p><b>Service delivery</b></p> <p>Use of Welsh language in service delivery</p> <p>Promoting use of the language</p>	As above	As above	As above
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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. There's no need to put something in every box if it is not relevant!




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>The financial strategy sets out the strategic approach and framework over the medium term for the Council's finances and in ensuring that they fundamentally support the delivery of the objectives and aims set out in the Community and Corporate Plan, and that was subject to its own integrated impact assessment. The strategy looks to ensure that Council's finances are put on a secure and sustainable footing and that delivery of the Council's policy objectives are affordable.</p> <p>The financial strategy looks to ensure efficient use of resources and support the council's delivery of the well-being goals.</p> <p>Future decisions that impact on the Council's budgetary framework will need to be prudent, sustainable and affordable, and will be the subject of their own Integrated Impact Assessment, including any impacts expected in relation to delivering well-being goals. This equally applies to the Council's budget process and where budget</p>	<p>None identified at this stage.</p>

<b>Well Being Goal</b>	<b>Does the proposal contribute to this goal? Describe the positive and negative impacts.</b>	<b>What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?</b>
	proposals are subject to their own Integrated Impact Assessment, individually and collectively.	
<b>A resilient Wales</b> Maintain and enhance biodiversity and land, river and coastal ecosystems that support resilience and can adapt to change (e.g. climate change)	As above	As above
<b>A healthier Wales</b> People's physical and mental wellbeing is maximized and health impacts are understood	As above	As above
<b>A Wales of cohesive communities</b> Communities are attractive, viable, safe and well connected	As above	As above
<b>A globally responsible Wales</b> Taking account of impact on global well-being when considering local social, economic and environmental wellbeing	As above	As above
<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	As above	As above
<b>A more equal Wales</b> People can fulfil their potential no matter what their background or circumstances	As above	As above

**4. 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 data-bbox="331 563 515 786">Balancing short term need with long term and planning for the future</p> <p data-bbox="147 778 280 810">Long Term</p>	<p data-bbox="544 256 1328 552">The financial strategy sets out the strategic approach and framework over the medium term for the Council's finances and in ensuring that they fundamentally support the delivery of the objectives and aims set out in the Community and Corporate Plan, and that was subject to its own integrated impact assessment. The strategy looks to ensure that Council's finances are put on a secure and sustainable footing and that delivery of the Council's policy objectives are affordable.</p> <p data-bbox="544 584 1328 791">The strategy looks out to the medium and long term. It looks to enhance the approach to financial modelling around demand and cost pressures as part of the medium-term financial planning process. It also looks to develop data around cost drivers to give early insight into medium and long term projections such as to aid future financial planning.</p> <p data-bbox="544 823 1328 1094">Future decisions that impact on the Council's budgetary framework will need to be prudent, sustainable and affordable, and will be the subject of their own Integrated Impact Assessment, including in relation to sustainable development principles being embedded and prioritised. This equally applies to the Council's budget process and where budget proposals are subject to their own Integrated Impact Assessment, individually and collectively.</p>	<p data-bbox="1350 256 2103 376">No further actions are proposed at this stage and will be considered as needed as part of future updates to the medium-term financial plan, and that includes future medium and long-term risks and impacts.</p>
 <p data-bbox="331 1137 515 1361">Working together with other partners to deliver objectives</p> <p data-bbox="125 1345 297 1377">Collaboration</p>	<p data-bbox="544 1137 808 1169">As above in long term</p> <p data-bbox="544 1201 1328 1329">The financial strategy sees collaboration and partnership working as key in contributing to how the Council will respond to its financial challenges over the medium term and as part of a wider programme of change and improvement.</p>	<p data-bbox="1350 1137 2103 1225">No further actions are proposed at this stage. This will be considered as needed as part of future updates to the medium-term financial plan and budget setting process.</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="349 312 517 496">Involving those with an interest and seeking their views</p> <p data-bbox="141 531 297 560"><b>Involvement</b></p>	<p data-bbox="544 256 808 285">As above in long term</p> <p data-bbox="544 320 1301 419">The Community and Corporate Plan has embedded within it the need to work closely with key stakeholders, partners and communities in the delivery of its policy aims and objectives.</p> <p data-bbox="544 451 1319 587">Consultation and engagement with members, residents, business and wider public and third sector partners will be a key aspect to the budget process and that will be required as part of the delivery of the financial strategy.</p>	<p data-bbox="1350 256 2096 347">No further actions are proposed at this stage. This will be considered as needed as part of future updates to the medium-term financial plan and budget setting process.</p>
 <p data-bbox="349 624 506 922">Putting resources into preventing problems occurring or getting worse</p> <p data-bbox="152 863 293 892"><b>Prevention</b></p>	<p data-bbox="544 624 808 652">As above in long term</p> <p data-bbox="544 687 1290 874">Prevention will be a key and ongoing focus for the financial strategy and the programme of change and improvement that allows the Council to make better use of limited resources over the medium to long term by tackling problems up front with a focus on good health and wellbeing for all residents.</p>	<p data-bbox="1350 624 2096 715">No further actions are proposed at this stage. This will be considered as needed as part of future updates to the medium-term financial plan and budget setting process.</p>
 <p data-bbox="349 962 517 1225">Considering impact on all wellbeing goals together and on other bodies</p> <p data-bbox="159 1206 300 1235"><b>Integration</b></p>	<p data-bbox="544 962 808 991">As above in long term</p>	<p data-bbox="1350 962 2096 1053">No further actions are proposed at this stage. This will be considered as needed as part of future updates to the medium-term financial plan and budget setting process.</p>

**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	<p>The financial strategy sets out the strategic approach and framework over the medium term for the Council's finances and in ensuring that they fundamentally support the delivery of the objectives and aims set out in the Community and Corporate Plan, and that was subject to its own integrated impact assessment.</p> <p>Future decisions that impact on the Council's budgetary framework will need to be prudent, sustainable and affordable, and will be the subject of their own Integrated Impact Assessment, including any impacts that relate to safeguarding. This equally applies to the Council's budget process and where budget proposals are subject to their own Integrated Impact Assessment, individually and collectively.</p>	None identified at this stage.	None identified at this stage.

Corporate Parenting	<p>The financial strategy sets out the strategic approach and framework over the medium term for the Council's finances and in ensuring that they fundamentally support the delivery of the objectives and aims set out in the Community and Corporate Plan, and that was subject to its own integrated impact assessment.</p> <p>Future decisions that impact on the Council's budgetary framework will need to be prudent, sustainable and affordable, and will be the subject of their own Integrated Impact Assessment, including any impacts that relate to corporate parenting. This equally applies to the Council's budget process and where budget proposals are subject to their own Integrated Impact Assessment, individually and collectively.</p>	None identified at this stage.	None identified at this stage.
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## 5. What evidence and data has informed the development of your proposal?

The financial strategy has been informed by a range of evidence and data that notably includes:

- The Council's community and corporate plan, and the suite of enabling strategies that support its delivery.
- Research across Wales and the UK to draw on effective and engaging financial strategies and plans.
- Audit Wales recommendations resulting from financial sustainability reviews across local authorities in Wales.
- Guidance and publications from CIPFA (the Chartered Institute of Public Finance and Accountancy, the professional body for public finance) and the LGA (Local Government Association) relating to financial planning and financial management.
- Reports from the Wales Fiscal Analysis (WFA) team, a research body within Cardiff University's Wales Governance Centre that undertakes authoritative and independent research into the public finances, taxation and public expenditures of Wales.
- Council budget and finance reports and that include recent budget monitoring reports, budget process and MTFP updates and budget proposals.

## 6. 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?

The financial strategy sets out the strategic approach and framework over the medium term for the Council's finances and in ensuring that they fundamentally support the delivery of the objectives and aims set out in the Community and Corporate Plan, and that was subject to its own integrated impact assessment. The strategy looks to ensure that Council's finances are put on a secure and sustainable footing and that delivery the of the Council's policy objectives are affordable.

The financial strategy encapsulates the sustainable development principles in so far as:

- It has a medium to long term focus on the Council's financial sustainability.
- Collaboration and partnership working as key to responding to the financial challenges faced.
- Consultation and engagement with members, residents, business and wider public and third sector partners will be a key aspect to the budget process and in the delivery of the financial strategy.
- Prevention will be a key and ongoing focus for the financial strategy and the programme of change and improvement that allows the Council to make better use of limited resources over the medium to long term by tackling problems up front.

There are no significant impacts on the protected characteristics, safeguarding or corporate parenting arising directly out of the financial strategy. Future decisions that impact on the Council's budgetary framework will need to be prudent, sustainable and affordable, and will be the subject of their own Integrated Impact Assessment. This equally applies to the Council's budget process and where budget proposals are subject to their own Integrated Impact Assessment, individually and collectively.

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

What are you going to do	When are you going to do it?	Who is responsible
No further action arising directly from this report.	N/A	N/A

**8. 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.**

Version No.	Decision making stage	Date considered	Brief description of any amendments made following consideration
1.0	Governance & Audit Committee	10 <sup>th</sup> July 2024	
2.0	Performance & Overview Scrutiny Committee	11 <sup>th</sup> July 2024	
3.0	Council	17 <sup>th</sup> July 2024	