

Equality analysis report

Use this report template to record your equality analysis. This report is a written record that demonstrates that you have shown *due regard* to the need to **eliminate unlawful discrimination**, **advance equality of opportunity** and **foster good relations** with respect to the personal characteristics protected by equality law. Due regard must be paid at formative stages of policy or service development, changes, or withdrawal.

To assist you in completing this report, please ensure you read the guidance notes in the Equality Analysis Toolkit and refer to the following Factsheets:

- Factsheet 1: Equality Profile of the Epping Forest District
- Factsheet 2: Sources of information about equality protected characteristics
- Factsheet 3: Glossary of equality related terms
- Factsheet 4: Common misunderstandings about the Equality Duty
- Factsheet 5: Frequently asked questions
- Factsheet 6: Reporting equality analysis to a committee or other decision making body

If you require further help, please contact the Performance Improvement Unit.

Step 1. About the policy, service change or withdrawal

Name of the policy, service or project: be specific	Budget framework for 2018/19 and Medium Term Financial Strategy
Revised / new / withdrawal:	Revised/New
Intended aims / outcomes/ changes:	The aim is to set a financial framework for 2018/19 and revise the medium term financial strategy. The outcome will be a budget that provides services at the level determined by Members within the funding agreed by Members. Any changes in the level or nature of service provision will be considered separately by Cabinet as savings/growth items before inclusion in the final budget.
Relationship with other policies / projects:	As stated above, other projects involving changes to services will have been considered by Cabinet before being included on the savings/growth lists.
Name of senior manager for the policy / project:	Bob Palmer
Name of policy / project manager:	Peter Maddock

Step 2. Decide if the policy, service change or withdrawal is equality relevant

<p>Does the policy / project / service process involve, or have consequences for employees or other people? If yes, please state who will be affected. If yes, then the policy / project is equality relevant.</p> <p>If no, state your reasons for this decision. Go to step 7.</p> <p><i>The majority of Council policies and projects are equality relevant because they affect employees or our communities in some way.</i></p>	<p>If yes, state which protected groups:</p> <p>The budget includes all services provided by the Council so it has consequences for all employees and all residents. However, the budget itself represents the financial aggregation of the Council's services and it is the services that have the primary consequences for employees and residents not the budget.</p>
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Step 3. Gather evidence to inform the equality analysis

What evidence have you gathered to help you understand the impact of your policy or service change or withdrawal on people? What does your evidence say about the people with the protected characteristics? If there is no evidence available for any of the characteristics, please explain why this is the case, and your plans to obtain relevant evidence. Please refer to Factsheet 2 'Sources of evidence for the protected characteristics'

Characteristic	Evidence (name of research, report, guidance, data source etc)	What does this evidence tell you about people with the protected characteristics?
Age	Draft EFDC Equality Scheme 2012 – 16 Corporate Plan 2011 – 15 Theme 2 - Sustainable. Theme 4 - Aspiring. Our Commitment To Equality page 14 Overarching Theme - Making our district a great place to live, work, study and do business	The elderly and the very young would normally experience difficulties in travelling to Epping to access services provided only from the Civic offices. However, an increasing range of services can be accessed via the Council's website.
Dependents / caring responsibilities	Draft EFDC Equality Scheme 2012 – 16 Corporate Plan 2011 – 15 Overarching Theme - Making our district a great place to live, work, study and do business	Those who due to caring responsibilities may experience difficulties in visiting the Civic offices to access services. However, an increasing range of services can be accessed via the Council's website.
Disability	Draft EFDC Equality Scheme 2012 – 16 Corporate Plan 2011 – 15 Theme 1 - Safe Theme 2 - Sustainable Theme 3 – Health Our Commitment To Equality page 14 Overarching Theme - Making our district a great place to live, work, study and do business	Persons with disabilities may have difficulties in travelling to Epping to access services. However, an increasing range of services can be accessed via the Council's website.
Gender reassignment	Draft EFDC Equality Scheme 2012 – 16 Corporate Plan 2011-15 Our Commitment To Equality page 14	In the case of Gender reassignment they may feel uncomfortable in travelling to Epping to access services and again should utilise the website to access the service or make alternative arrangements.
Marriage and civil partnership	Draft EFDC Equality Scheme 2012 – 16 Corporate Plan 2011-15 Overarching Theme - Making our district a great place to live, work, study and do business	There is limited data available for this.
Pregnancy and maternity	Draft EFDC Equality Scheme 2012 – 16 Corporate Plan 2011-15 Our Commitment To Equality page 14 Overarching Theme - Making our district a great place to live, work, study and do business	While there is limited data available for this, it is likely that persons within this sector may experience difficulties in traveling to Epping to access services.
Race / ethnicity	Draft EFDC Equality Scheme 2012 – 16 Corporate Plan 2011-15 Our Commitment To Equality page 14 Our Commitment To Equality page 14 Overarching Theme - Making our district a great place to live, work, study and do business	In the case of Race/Ethnicity some groups may be reluctant or feel uncomfortable in travelling to Epping to access services.
Religion or belief	Draft EFDC Equality Scheme 2012 – 16 Corporate Plan 2011-15 Our Commitment To Equality page 14 Overarching Theme - Making our	In the case of Religion/Belief some groups may feel uncomfortable in travelling to Epping to access services.

Characteristic	Evidence (name of research, report, guidance, data source etc)	What does this evidence tell you about people with the protected characteristics?
	district a great place to live, work, study and do business	
Sex	Draft EFDC Equality Scheme 2012 – 16 Our Commitment To Equality page 14 Overarching Theme - Making our district a great place to live, work, study and do business	There is limited information available, but from this there is no significant evidence suggesting that general service provision favours either sex.
Sexual orientation	Draft EFDC Equality Scheme 2012 – 16 Corporate Plan 2011-15 Our Commitment To Equality page 14 Our Commitment To Equality page 14 Overarching Theme - Making our district a great place to live, work, study and do business	There is no evidence to suggest that persons of different sexual orientation experience difficulties accessing services. However the provision of accurate and timely information via the Council's website may be helpful to disadvantaged groups.

Steps 4 & 5 Analyse the activity, policy or change (*The duty to eliminate unlawful discrimination*)

Based on the evidence you have analysed, describe any actual or likely adverse impacts that may arise as a result of the policy decision. Where actual or likely adverse impacts have been identified, you should also state what actions will be taken to mitigate that negative impact, ie what can the Council do to minimise the negative consequences of its decision or action.

Characteristic	Actual or likely adverse impacts identified	Actions that are already or will be taken to reduce the negative effects identified
Age	There are no policies proposed as part of the budgetary framework that are likely to impact on residents because of their age.	Where a significant change to service provision has been proposed the service area making that proposal will have reported within their equality analysis any appropriate actions.
Dependents / caring responsibilities	There are no policies proposed as part of the budgetary framework that are likely to impact on residents because of caring responsibilities.	See above.
Disability	There are no policies proposed as part of the budgetary framework that are likely to impact on residents because of disability.	See above.
Gender reassignment	There are no policies proposed as part of the budgetary framework that are likely to impact on residents because of gender reassignment.	See above.
Marriage and civil partnership	There are no policies proposed as part of the budgetary framework that are likely to impact on residents because of marital status.	See above.
Pregnancy and maternity	There are no policies proposed as part of the budgetary framework that are likely to impact on	See above.

Characteristic	Actual or likely adverse impacts identified	Actions that are already or will be taken to reduce the negative effects identified
	residents because of pregnancy/maternity.	
Race / ethnicity	There are no policies proposed as part of the budgetary framework that are likely to impact on residents because of race/ethnicity.	See above.
Religion or belief	There are no policies proposed as part of the budgetary framework that are likely to impact on residents because of religion/belief.	See above.
Sex	There are no policies proposed as part of the budgetary framework that are likely to impact on residents because of their sex.	See above.
Sexual orientation	There are no policies proposed as part of the budgetary framework that are likely to impact on residents because of their sexual orientation.	See above.

Step 6. - The duty to advance equality of opportunity

Can the policy, service or project help to advance equality of opportunity in any way? If yes, provide details. If no, provide reasons. (Note: not relevant to marriage and civil partnership)

Characteristic	Ways that this policy, service or project can advance equality of opportunity	Why this policy, service or project cannot help to advance equality of opportunity:
Age	Not applicable.	The policy is concerned with an overall financial framework for the provision of services in total. It is not concerned with the nature or level of provision of any individual service. So whilst the individual services within the directorate estimates can advance equality of opportunity the budget and medium term financial strategy cannot. Any significant changes to service provision will be considered by Cabinet and this will include an equality assessment.
Dependents / caring responsibilities	See above.	See above.
Disability	See above.	See above.
Gender reassignment	See above.	See above.
Pregnancy and maternity	See above.	See above.
Race / ethnicity	See above.	See above.
Religion or belief	See above.	See above.
Sex	See above.	See above.
Sexual orientation	See above.	See above.

The duty to foster good relations

Can the policy, service or project help to foster good relations in any way? If yes, provide details. If no, provide reasons. (Note: not relevant to marriage and civil partnership)

Characteristic	How this policy, service or project can foster good relations:	Why this policy, service or project cannot help to foster good relations:
Age	Not applicable.	This policy is concerned with the Council's overall financial position and as such is not directly service related.
Dependents / caring responsibilities	See above.	See above.
Disability	See above.	See above.
Gender reassignment	See above.	See above.
Pregnancy and maternity	See above.	See above.
Race / ethnicity	See above.	See above.
Religion or belief	See above.	See above.
Sex	See above.	See above.

Characteristic	How this policy, service or project can foster good relations:	Why this policy, service or project cannot help to foster good relations:
Sexual orientation	See above.	See above.

Step 7. Documentation and Authorisation

Summary of actions to be taken as a result of this analysis (add additional rows as required):	Name and job title of responsible officer	How and when progress against this action will be reported
None, as the analysis above has determined that no actual or likely adverse impacts would arise as a result of this project.	Bob Palmer	N/A

Name and job title of officer completing this analysis:	Peter Maddock Assistant Director
Date of completion:	7 July 2017
Name & job title of responsible officer: (If you have any doubts about the completeness or sufficiency of this equality analysis, advice and support are available from the Performance Improvement Unit)	Bob Palmer
Date of authorisation:	10 July 2017
Date signed copy and electronic copy forwarded to PIU equality@eppingforestdc.gov.uk	

Step 8. Report your equality analysis to decision makers:

Your findings from this analysis (and any previous analysis) must be made available to a decision making body when it is considering the relevant service or policy. Therefore you must:

- Reflect the findings from this analysis in a 'Due Regard Record' (template available), and attach it as an appendix to your report. The Record can be updated as your policy or service changes develop, and it exists as a log of evidence of due regard;
- Include this equality information in your verbal report to agenda planning groups or directly to portfolio holders and other decision making groups.

Your summary of equality analysis must include the following information:

- If this policy, service change or withdrawal is relevant to equality, and if not, why not;
- The evidence base (information / data / research / feedback / consultation) you used to help you understand the impact of what you are doing or are proposing to do on people with protected characteristics;
- What the evidence base (information / data / research / feedback / consultation) told you about people with protected characteristics;
- What you found when you used that evidence base to assess the impact on people with the protected characteristics;
- Whether or not your policy or service changes could help to advance quality of opportunity for people with any of the protected characteristics;
- Whether or not your policy or service changes could help to foster good relations between communities.