

# Equality Impact and Needs Analysis Guidance and Template : 2021

**Budget Equality Analysis Full  
Template: 2023**

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## Guidance notes

### Things to remember:

Under the Public Sector Equality Duty (PSED) public authorities are required to have due regard to the aims of the general equality duty when making decisions and when setting policies. Understanding the affect of the council's policies and practices on people with different protected characteristics is an important part of complying with the general equality duty. Under the PSED the council must ensure that:

- Decision-makers are aware of the general equality duty's requirements.
- The general equality duty is complied with before and at the time a particular policy is under consideration and when a decision is taken.
- They consciously consider the need to do the things set out in the aims of the general equality duty as an integral part of the decision-making process.
- They have sufficient information to understand the effects of the policy, or the way a function is carried out, on the aims set out in the general equality duty.
- They review policies or decisions, for example, if the make-up of service users changes, as the general equality duty is a continuing duty.
- They take responsibility for complying with the general equality duty in relation to all their relevant functions. Responsibility cannot be delegated to external organisations that are carrying out public functions on their behalf.
- They consciously consider the need to do the things set out in the aims of the general equality duty not only when a policy is developed and decided upon, but when it is being implemented.

Best practice guidance from the Equality and Human Rights Commission recommends that public bodies:

- Consider all the [protected characteristics](#) and all aims of the general equality duty (apart from in relation to marriage and civil partnership, where only the discrimination aim applies).
- Use equality analysis to inform policy as it develops to avoid unnecessary additional activity.
- Focus on the understanding the effects of a policy on equality and any actions needed as a result, not the production of a document.
- Consider how the time and effort involved should relate to the importance of the policy to equality.
- Think about steps to advance equality and good relations as well as eliminate discrimination.
- Use good evidence. Where it isn't available, take steps to gather it (where practical and proportionate).

- Use insights from engagement with employees, service users and others can help provide evidence for equality analysis.

Equality analysis should be referenced in community impact statements in Council reports. Community impact statements are a corporate requirement in all reports to the following meetings: the cabinet, individual decision makers, scrutiny, regulatory committees and community councils. Community impact statements enable decision makers to identify more easily how a decision might affect different communities in Southwark and to consider any implications for equality and diversity.

The public will be able to view and scrutinise any equality analysis undertaken. Equality analysis should therefore be written in a clear and transparent way using plain English. Equality analysis may be published under the council's publishing of equality information, or be present with divisional/departmental/service business plans. These will be placed on the website for public view under the council's Publications Scheme. All Cabinet reports will also publish related

Equality analysis should be reviewed after a sensible period of time to see if business needs have changed and/or if the effects that were expected have occurred. If not then you will need to consider amending your policy accordingly. This does not mean repeating the equality analysis, but using the experience gained through implementation to check the findings and to make any necessary adjustments.

Engagement with the community is recommended as part of the development of equality analysis. The council's Community Engagement Division and critical friend, the Forum for Equality and Human Rights in Southwark can assist with this (see section below on community engagement and [www.southwarkadvice.org.uk](http://www.southwarkadvice.org.uk)).

Whilst the equality analysis is being considered, Southwark Council recommends considering Socio-Economic implications, as socio-economic inequalities have a strong influence on the environment we live and work in. As a major provider of services to Southwark residents, the council has a legal duty to reduce socio-economic inequalities and this is reflected in its values and aims. For this reason, the council recommends considering socio-economic impacts in all equality analyses, not forgetting to include identified potential mitigating actions.

## Section 1: Equality impact and needs analysis details

<b>Proposed policy/decision/business plan area to which this equality analysis relates</b>		Policy and Resources: Budget Setting 2024-25 – Savings – Leisure Directorate – Trees budget			
<b>Equality analysis author</b>		Tara Quinn			
<b>Strategic Director:</b>		Caroline Bruce			
<b>Department</b>		Leisure	<b>Division</b>		Environment, Neighbourhoods & Growth
<p><b>Period analysis undertaken</b> Please note that the equality analysis informs all stages of the budget setting process up to final decision making. It can be built upon at all stages.</p> <p>It can be further built upon and reviewed at implementation stage.</p>		<p><b>Please Indicate which stage of the Budget Proposal decision making process this equality analysis is informing:</b></p> <ul style="list-style-type: none"> <li>• Budget Challenge and date</li> <li>• <b><u>December Equality Analysis</u></b></li> <li>• January Cabinet Equality Analysis</li> <li>• January Overview and Scrutiny Committee</li> <li>• February Council Assembly</li> </ul>			
<b>Indicative date of implementation of budget proposal if known</b>		1 April 2024			
<b>Sign-off</b>		<b>Position</b>		<b>Date</b>	

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## Section 2: Description of budget proposal

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**Please provide full details of the budget proposal and the predicted saving**

Efficiencies in tree contract and capitalisation of some costs - This saving is achievable due to the expected early achievement of target for 100,000 trees in the borough. May include capitalisation of costs equivalent to one post attributed to tree planting.

In recent years the budget for tree maintenance has been significantly increased in response to significant enhancements in the management of tree maintenance across the borough and in response to the commitment to plant additional trees. The new trees maintenance works contracts have now been operational for 9 months, which has provided a much clearer picture of the resources required in future years. This has enabled a small proposed budget adjustment to be identified without impacting on future works programmes.

In addition to this, some of the officer resource costs required for the planning and provision of tree planting has been realigned for funding out of the council's capital budget for tree planting.

The saving proposed is £50k per annum, and has no impact on the service provided.

**Section 3: Overview of service users and key stakeholders consulted**

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<b>2. Service users and stakeholders</b>	
<b>Key users of the department or service</b>	All residents - as the 95,000 trees currently in the council's care are located all over the borough.
<b>Key stakeholders were/are involved in this policy/decision/business plan</b>	None

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## Section 4: Pre-implementation equality impact and needs analysis

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This section considers the potential impacts (positive and negative) on groups with 'protected characteristics', the equality information on which this analysis is based and any mitigating actions to be taken, including improvement actions to promote equality and tackle inequalities. An equality analysis also presents as an opportunity to improve services to meet diverse needs, promote equality, tackle inequalities and promote good community relations. It is not just about addressing negative impacts.

The columns include societal issues (discrimination, exclusion, needs etc.) and socio-economic issues (levels of poverty, employment, income). As the two aspects are heavily interrelated it may not be practical to fill out both columns on all protected characteristics. The aim is, however, to ensure that socio-economic issues are given special consideration, as it is the council's intention to reduce socio-economic inequalities in the borough. Key is also the link between protected characteristics and socio-economic disadvantage, including experiences of multiple disadvantage.

**Socio-economic disadvantage may arise from a range of factors, including:**

- poverty
- health
- education
- limited social mobility
- housing
- a lack of expectations
- discrimination
- multiple disadvantage

**The public sector equality duty ( PSED )** requires us to find out about and give due consideration to the needs of different protected characteristics in relation to the three parts of the duty:

1. Eliminating discrimination, harassment and victimisation
2. Advancing equality of opportunity, including finding out about and meeting diverse needs of our local communities, addressing disadvantage and barriers to equal access; enabling all voices to be heard in our engagement and consultation undertaken; increasing the participation of under represented groups
3. Fostering good community relations; promoting good relations; to be a borough where all feel welcome, included, valued, safe and respected.

**The PSED is now also further reinforced in the two additional Fairer Future For All values: that we will**

- Always work to make Southwark more equal and just
- Stand against all forms of discrimination and racism

<b>Age</b> - Where this is referred to, it refers to a person belonging to a particular age (e.g. 32 year olds) or range of ages (e.g. 18 - 30 year olds).	
<b>Potential impacts (positive and negative) of proposed policy/decision/business plan; this also includes needs in relation to each part of the duty.</b>	<b>Potential Socio-Economic impacts/ needs/issues arising from socio-economic disadvantage (positive and negative)</b>
No impact – the service outputs and provision remains the same	No impact – the service outputs and provision remains the same
<b>Equality information on which above analysis is based</b>	<b>Socio-Economic data on which above analysis is based</b>
Not required - the service outputs and provision remains the same	Not required - the service outputs and provision remains the same
<b>Mitigating and/or improvement actions to be taken</b>	
N/A	

<b>Disability</b> - A person has a disability if s/he has a physical or mental impairment which has a substantial and long-term adverse effect on that person's ability to carry out normal day-to-day activities.  Please note that under the PSED due regard includes:  Giving due consideration in all relevant areas to “the steps involved in meeting the needs of disabled persons that are different from the needs of persons who are not disabled include, in particular, steps to take account of disabled persons' disabilities.” This also includes the need to understand and focus on different needs/impacts arising from different disabilities.	
<b>Potential impacts (positive and negative) of proposed policy/decision/business plan; this also includes needs in relation to each part of the duty.</b>	<b>Potential socio-economic impacts/ needs/issues arising from socio-economic disadvantage (positive and negative)</b>
No impact – the service outputs and provision remains the same	No impact – the service outputs and provision remains the same
<b>Equality information on which above analysis is based</b>	<b>Socio-economic data on which above analysis is based</b>



Not required - the service outputs and provision remains the same	Not required - the service outputs and provision remains the same
<b>Mitigating and/or improvement actions to be taken</b>	
N/A	

<p><b>Gender reassignment:</b> - The process of transitioning from one gender to another.</p> <p><b>Gender Identity:</b> Gender identity is the personal sense of one's own gender. Gender identity can correlate with a person's assigned sex or can differ from it.</p>	
<b>Potential impacts (positive and negative) of proposed policy/decision/business plan; this also includes needs in relation to each part of the duty.</b>	<b>Potential socio-economic impacts/ needs/issues arising from socio-economic disadvantage (positive and negative)</b>
No impact – the service outputs and provision remains the same	No impact – the service outputs and provision remains the same
<b>Equality information on which above analysis is based.</b>	<b>Socio-economic data on which above analysis is based</b>
Not required - the service outputs and provision remains the same	Not required - the service outputs and provision remains the same
<b>Mitigating and/or improvement actions to be taken</b>	
N/A	

<p><b>Marriage and civil partnership</b> – In England and Wales marriage is no longer restricted to a union between a man and a woman but now includes a marriage between a same-sex couples. Same-sex couples can also have their relationships legally recognised as 'civil partnerships'. Civil partners must not be treated less favourably than married couples and must be treated the same as married couples on a wide range of legal matters. <b>(Only to be considered in respect to the need to eliminate discrimination.)</b></p>	
<b>Potential impacts (positive and negative) of proposed policy/decision/business plan</b>	<b>Potential socio-economic impacts/ needs/issues arising from socio-economic disadvantage (positive and negative)</b>
No impact – the service outputs and provision remains the same	No impact – the service outputs and provision remains the same

<b>Equality information on which above analysis is based</b>	<b>Socio-economic data on which above analysis is based</b>
Not required - the service outputs and provision remains the same	Not required - the service outputs and provision remains the same
<b>Mitigating or improvement actions to be taken</b>	
<b>N/A</b>	

<b>Pregnancy and maternity</b> - Pregnancy is the condition of being pregnant or expecting a baby. Maternity refers to the period after the birth, and is linked to maternity leave in the employment context. In the non-work context, protection against maternity discrimination is for 26 weeks after giving birth, and this includes treating a woman unfavourably because she is breastfeeding.	
<b>Potential impacts (positive and negative) of proposed policy/decision/business plan; this also includes needs in relation to each part of the duty.</b>	<b>Potential socio-economic impacts/needs/issues arising from socio-economic disadvantage (positive and negative)</b>
No impact – the service outputs and provision remains the same	No impact – the service outputs and provision remains the same
<b>Equality information on which above analysis is based</b>	<b>Socio-economic data on which above analysis is based</b>
Not required - the service outputs and provision remains the same	Not required - the service outputs and provision remains the same
<b>Mitigating and/or improvement actions to be taken</b>	
<b>N/A</b>	

**Race** - Refers to the protected characteristic of Race. It refers to a group of people defined by their race, colour, and nationality (including citizenship) ethnic or national origins. N.B. Gypsy, Roma and Traveller are recognised racial groups and their needs should be considered alongside all others

<b>Potential impacts (positive and negative) of proposed policy/decision/business plan; this also includes needs in relation to each part of the duty.</b>	<b>Potential socio-economic impacts/ needs/issues arising from socio-economic disadvantage (positive and negative)</b>
No impact – the service outputs and provision remains the same	No impact – the service outputs and provision remains the same
<b>Equality information on which above analysis is based</b>	<b>Socio-economic data on which above analysis is based</b>
Not required - the service outputs and provision remains the same	Not required - the service outputs and provision remains the same
<b>Mitigating and/or improvement actions to be taken</b>	
<b>N/A</b>	

<b>Religion and belief</b> - Religion has the meaning usually given to it but belief includes religious and philosophical beliefs including lack of belief (e.g. Atheism). Generally, a belief should affect your life choices or the way you live for it to be included in the definition.	
<b>Potential impacts (positive and negative) of proposed policy/decision/business plan; this also includes needs in relation to each part of the duty.</b>	<b>Potential socio-economic impacts/ needs/issues arising from socio-economic disadvantage (positive and negative)</b>
No impact – the service outputs and provision remains the same	No impact – the service outputs and provision remains the same
<b>Equality information on which above analysis is based</b>	<b>Socio-economic data on which above analysis is based</b>
Not required - the service outputs and provision remains the same	Not required - the service outputs and provision remains the same
<b>Mitigating and/or improvement actions to be taken</b>	
<b>N/A</b>	

<b>Sex</b> - A man or a woman.
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<b>Potential impacts (positive and negative) of proposed policy/decision/business plan; this also includes needs in relation to each part of the duty.</b>	<b>Potential socio-economic impacts/ needs/issues arising from socio-economic disadvantage (positive and negative)</b>
No impact – the service outputs and provision remains the same	No impact – the service outputs and provision remains the same
<b>Equality information on which above analysis is based</b>	<b>Socio-economic data on which above analysis is based</b>
Not required - the service outputs and provision remains the same	Not required - the service outputs and provision remains the same
<b>Mitigating and/or improvement actions to be taken</b>	
N/A	

<b>Sexual orientation</b> - Whether a person's sexual attraction is towards their own sex, the opposite sex or to both sexes	
<b>Potential impacts (positive and negative) of proposed policy/decision/business plan; this also includes needs in relation to each part of the duty.</b>	<b>Potential socio-economic impacts/ needs/issues arising from socio-economic disadvantage (positive and negative)</b>
No impact – the service outputs and provision remains the same	No impact – the service outputs and provision remains the same
<b>Equality information on which above analysis is based</b>	<b>Socio-economic data on which above analysis is based</b>
Not required - the service outputs and provision remains the same	Not required - the service outputs and provision remains the same
<b>Mitigating and/or improvement actions to be taken</b>	
N/A	

**Human Rights**  
 There are 16 rights in the Human Rights Act. Each one is called an Article. They are all taken from the European Convention on Human Rights. The Articles are The right to life, Freedom from torture, inhuman and degrading treatment, Freedom from forced labour , Right to Liberty, Fair trial, Retrospective penalties, Privacy, Freedom of conscience, Freedom of expression, Freedom

of assembly, Marriage and family, Freedom from discrimination and the First Protocol
<b>Potential impacts (positive and negative) of proposed policy/decision/business plan</b>
No impact – the service outputs and provision remains the same
<b>Information on which above analysis is based</b>
Not required - the service outputs and provision remains the same
<b>Mitigating and/or improvement actions to be taken</b>
N/A

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**Conclusions**

**Summarise main findings and conclusions of the overall equality impact and needs analysis for this area:**

Have any potential significant concerns amongst service users or the wider community been identified? - No

Have any potential negative, disproportionate or adverse impacts on particular protected characteristics been identified? - No

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Have you identified any negative or positive impacts re: the promotion of good community relations ? - No

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Are there any specific implications for groups experiencing socio-economic disadvantage ?  
 - No

Are there any specific implications for groups experiencing socio-economic disadvantage and protected characteristics ? - No

Are there any specific implications for Borough Plan priorities or commitments ?

**Section 5: Further equality actions and objectives**

<b>5. Further actions</b>			
Based on the initial analysis above, please detail the key mitigating and/or improvement actions to promote equality and tackle inequalities; and any areas identified as requiring more detailed analysis.			
<b>Number</b>	<b>Description of issue</b>	<b>Action</b>	<b>Timeframe</b>
1			
2			
3			
4			
5			
6			
7			

<b>5. Equality and socio-economic objectives (for business plans)</b>				
Based on the initial analysis above, please detail any of the equality objectives outlined above that you will set for your division/department/service. Under the objective and measure column please state whether this objective is an existing objective or a suggested addition to the Council Plan.				
<b>Objective and measure</b>	<b>Lead officer</b>	<b>Current performance (baseline)</b>	<b>Targets</b>	
			<b>Year 1</b>	<b>Year 2</b>

**6. Review of implementation of the equality objectives and actions**


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**Implementation Equality Impact and Needs Analysis of budget proposal:  
proposed date if known**

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