

## EQUALITY IMPACT ASSESSMENT

Stage 1: Title and aims of the activity (“activity” is an umbrella term covering policies, procedures, guidance and decisions).	
Service	Cross Cutting
Section	Cross Service
Title of the activity etc.	Treasury Management
Aims of the activity	As a result of uncertainty in the financial markets in mid-2016 opportunities arose for early borrowing of 2016/17 funds. Borrowing was able to be taken at rates below budget, therefore generating a full year saving in 2017/18 of £2million.
Author(s) & Title(s)	Alan Wood, Head of Finance

Stage 2: List the evidence that has been used in this assessment.	
Internal data (customer satisfaction surveys; equality monitoring data; customer complaints).	The Finance Service uses a range of performance measures to monitor performance. Customer satisfaction levels are monitored on a regular basis.
Internal consultation with staff and other services affected.	Consultation with members of the finance staff, Business Services Leadership Team (BSLT) and Senior Leadership Team (SLT).
External consultation (partner organisations, community groups, and councils).	N/A
External data (census, available statistics).	Data from Central Government and our Treasury advisors was analysed to assist in arriving at the decision when and how much to borrow.
Other (general information as appropriate).	N/A

Stage 3: Evidence Gaps.	
Are there any gaps in the information you currently hold?	This is a strategic document that looks at the approach to funding the Capital Plan of the Council. The savings exercise will be managed to ensure that funding is available to deliver the plan.

Stage 4: Measures to fill the evidence gaps.		
What measures will be taken to fill the information gaps before the activity is implemented? These should be included in the action plan at the back of this form.	Measures:	Timescale:
	The BSLT will work with the corporate communications team to ensure that any impacts of this saving are communicated effectively to all those affected by the process.	Ongoing

Stage 5: Are there potential impacts on protected groups? Please complete for each protected group by inserting "yes" in the applicable box/boxes below.				
	Positive	Negative	Neutral	Unknown
Age – Younger			Yes	
Age – Older			Yes	
Disability			Yes	
Race – (includes Gypsy Travellers)			Yes	
Religion or Belief			Yes	
Gender – male/female			Yes	
Pregnancy and maternity			Yes	
Sexual orientation – (includes Lesbian/ Gay/Bisexual)			Yes	
Gender reassignment – (includes Transgender)			Yes	
Marriage and Civil Partnership			Yes	

**Stage 6: What are the positive and negative impacts?**

Impacts.	Positive (describe the impact for each of the protected characteristics affected)	Negative (describe the impact for each of the protected characteristics affected)
Please detail the potential positive and/or negative impacts on those with protected characteristics you have highlighted above. Detail the impacts and describe those affected.	N/A	N/A

**Stage 7: Have any of the affected groups been consulted?**

If yes, please give details of how this was done and what the results were. If no, how have you ensured that you can make an informed decision about mitigating steps?	N/A
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**Stage 8: What mitigating steps will be taken to remove or reduce negative impacts?**

These should be included in any action plan at the back of this form.	Mitigating Steps	Timescale
	N/A	

**Stage 9: What steps can be taken to promote good relations between various groups?**

These should be included in the action plan.	N/A
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Stage 10: How does the policy/activity create opportunities for advancing equality of opportunity?

The Treasury function will continue to support the Council services to provide capital funding that continues to create opportunities for advancing equality of opportunity.

Stage 11: What equality monitoring arrangements will be put in place?

These should be included in any action plan (for example customer satisfaction questionnaires).

Equality considerations are considered as part of the development of the Business Services service plan.

Stage 12: What is the outcome of the Assessment?

Please complete the appropriate box/boxes	1	No negative impacts have been identified –please explain.
	The saving will have no impact on the ability of the Council to fund the Capital Plan.	
	2	Negative Impacts have been identified, these can be mitigated - please explain. * Please fill in Stage 13 if this option is chosen.
	3	The activity will have negative impacts which cannot be mitigated fully – please explain. * Please fill in Stage 13 if this option is chosen

\* Stage 13: Set out the justification that the activity can and should go ahead despite the negative impact.

N/A

Stage 14: Sign off and authorisation.

Sign off and authorisation.	1) Service and Team	Business Services		
	2) Title of Policy/Activity	Treasury Management		
	3) <b>Authors:</b> I/We have completed the equality impact assessment for this policy/activity.	Name: Alan Wood Position: Head of Finance Date: 18/01/2017 Signature:	Name: Position: Date: Signature:	
		Name: Chris Smith Position: Principal Accountant Date: 18/01/2017 Signature:	Name: Position: Date: Signature:	
	4) Consultation with Service Manager	Name: Date:		
	5) Authorisation by Director or Head of Service	Name: Alan Wood Position: Head of Finance Date: 18/01/17	Name: Position: Date:	
	6) If the EIA relates to a matter that has to go before a Committee, Committee report author sends the Committee Report and this form, and any supporting assessment documents, to the Officers responsible for monitoring and the Committee Officer of the relevant Committee. E.g. Social Work and Housing Committee.	Date:		
	7) EIA author sends a copy of the finalised form to: eia@abdnshire	Date:		
(Equalities team to complete) Has the completed form been published on the website? YES/NO			Date:	

