

Initial Equality Screening Assessment (Part A)

As a public authority we need to ensure that all our strategies, policies, service and functions, both current and proposed have given proper consideration to equality and diversity.

A **screening** process can help judge relevance and provide a record of both the process and decision. Screening should be a short, sharp exercise that determines relevance for all new and revised strategies, policies, services and functions.

Completed at the earliest opportunity it will help to determine:

- the relevance of proposals and decisions to equality and diversity
- whether or not equality and diversity is being/has already been considered, and
- whether or not it is necessary to carry out an equality analysis.

Directorate: Finance and Customer Services	Service area: Finance
Lead person: Rob Mahon	Contact number: 01709 254518

1. Title:

Is this a:

Strategy / Policy

 Service / Function

 Other

If other, please specify

2. Please provide a brief description of what you are screening

The Council is required to set a balanced budget for 2026/27 and present that balanced budget at Cabinet in February 2026 and March Council 2026. The budget report outlines the Council's available resources from core government funding, grants and those resources generated through local taxation, and how those resources will be utilised across the Councils services.

The Council's Budget and Council Tax report 2025/26 included the delivery of £7.925m savings, made up of £5.333m existing savings still to be delivered and £2.592m of new savings, approved in the Budget report. This position was further improved following the end of the 2024/25 financial year, which comes after the 2025/26 Budget is approved at March Council. As at the financial year end 2024/25 following the delivery of a further £431k of the existing savings the Council had £7.494m of savings still to be delivered as shown below. Financial Monitoring reports

to Cabinet during 2025/26 have monitored progress against these savings, at present, £6.918m of delivery has been secured.

For 2026/27 the Council has to consider the following in order to set a budget and MTFS for 2026/27 to 2028/29;

- Impact of Provisional Financial Settlement
- Impact of Fair Funding Review 2.0
- Council Tax increases
- Fees and Charges increases
- Further use of reserves.
- Potential Savings
- Potential Capital and Revenue Investments

As outlined in the Budget and Council Tax Report 2026/27 the Council has to a degree used all these options to create a balanced budget position for 2026/27 and 2027/28. However, due to the financial pressures in 2028/29 and to a degree economic uncertainty over that period the Council has a £9.3m Budget gap in 2028/29. The Council will monitor this position closely and take further actions as required as greater clarity around the financial pressures faced and how the funding position moves across the period. As the Budget Report details the Council expects a positive outcome from the Business Rates Reset that is expected to complete in the summer of 2026, however, it is too early to build any benefit from that process into the MTFS.

The delivery of new savings and investments as part of this Budget and Council Tax report will need to be worked through with their own EIA and following the Council's Human Resource policies and procedures to ensure that appropriate engagement, consultation and support is provided to impacted staff. In addition, any likely impacts on residents will need to be assessed to ensure that any that are disproportionate in relation to protected groups, are mitigated where possible.

In addition to the revenue budget, the Council's revised Capital Programme will be approved as part of the budget report. The Council's Capital Programme will be approved as part of the Capital Strategy section of the budget report.

Finally, the budget report will approve the Council's Treasury Management Strategy, and prudential indicators. This report covers how the Council intends to manage its debt, borrowing for new investments, cashflow and banking procedures and risk. The prudential indicators provide the key framework for how that strategy will be managed.

The Budget sets the framework within which Cabinet makes its decisions. Therefore, detailed impact assessments of proposals within the budget will be undertaken at the earliest opportunity as they are developed, in order to inform decision-making.

In addition, services will consider equality implications that arise from the implementation of the Council's Budget through service planning process.

3. Relevance to equality and diversity

All the Council's strategies/policies, services/functions affect service users, employees or the wider community – borough wide or more local. These will also have a greater/lesser relevance to equality and diversity.

The following questions will help you to identify how relevant your proposals are.

When considering these questions think about age, carers, disability, gender reassignment, race, religion or belief, sex, sexual orientation and any other relevant characteristics (for example socio-economic status, social class, income, unemployment, residential location or family background and education or skills levels).

Questions	Yes	No
Could the proposal have implications regarding the accessibility of services to the whole or wider community?	X	
Could the proposal affect service users?	X	
Has there been or is there likely to be an impact on an individual or group with protected characteristics?	X	
Have there been or likely to be any public concerns regarding the proposal?	X	
Could the proposal affect how the Council's services, commissioning or procurement activities are organised, provided, located and by whom?	X	
Could the proposal affect the Council's workforce or employment practices?	X	

If you have answered **no** to all the questions above please complete **sections 5 and 6**.

If you have answered **yes** to any of the above please complete **section 4**.

4. Considering the impact on equality and diversity

If you have not already done so, the impact on equality and diversity should be considered within your proposals prior to carrying out an **Equality Analysis**.

Considering equality and diversity will help to eliminate unlawful discrimination, harassment and victimisation and take active steps to create a discrimination free society by meeting a group or individual's needs and encouraging participation.

Please provide specific details for all three areas below and use the prompts for guidance.

The budget report provides an indication of the key challenges that the Council faces, and the specific challenges faced by each directorate along with an indication of the aims and objectives of those directorates.

The ongoing financial challenges faced by the Council are similar to those of other local authorities. The financial pressures faced by local authorities are largely as a result of inflation, rising demand and complexity of care packages as a result of a growing population, and market cost pressures within the provision of social care.

These budget pressures mean that the Council must be responsible in its budget setting approach, prioritising investment and savings proposals that best contribute to the Council's priorities as identified within the Council Plan to best meet the needs of Rotherham's residents and ensure that best value is demonstrated across the breadth of Council services.

The budget proposals for 2026/27 include provision for £8.6m additional Budget for adult social care. Children's Placements budgets will be uplifted by £2.8m with a further £2m earmarked for in year inflationary uplifts. During 2025/26 the Council reviewed the CYPS placements savings that were originally approved as part of 2019/20 Budget setting. This review focussed on looking back across this period to assess if the Council has made the savings that it originally set out to achieve and if those savings have impacted positively on the Council's placements costs. The result of the review shows that the Council has reduced Looked After Children (LAC) placements across this period by in excess of 120 placements. The challenge across this period is that market costs in this sector, in particular on residential placements, have risen dramatically and continue to do so. As a comparison, had the Council still had that same level of placements that it held in 2019/20, at today's prices, the Council would be spending around £10m more per year. As such the Council is able to record these savings as delivered as the key actions have been achieved. The remaining pressures within CYPS relate more towards the impact of rising market prices, lack of real growth in the Council's fostering placements and the need to complete the in-house residential programme.

A budget increase is provided for ongoing cost and demand pressures within Home to School Transport, a national issue and pressure.

The budget proposals also prioritise £2.8m revenue budget investment across the following themes, mirroring the Council Plan priorities:

- Places are thriving, safe, and clean,
- An economy that works for everyone,
- Children and young people achieve their potential,
- Residents live well,
- One Council that listens and learns.

The Council is aware that many residents will be facing rising household costs. In recognition of this the Council proposes to provide a further Local Council Tax Support Top Up scheme across the financial year 2026/27. Based on current caseloads this is expected to provide additional support to approximately 14,000 households. The Council's Local Council Tax Support Scheme was fully reviewed in 2024 and no further changes are proposed to the scheme for 2026/27.

The Capital Programme section of the report will seek approval for a series of new investment proposals, prioritised following a process of review and scrutiny of options.

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The linked financial revenue implications of the capital programme have been factored into the Council's revenue budget.

A public consultation on the Budget ran from 28th November 2025 to January 9th 2026 and responses have been considered in finalising the budget proposals. A report reflecting the consultation is appended to this report. No specific equality implications were raised as part of the consultation. A full report on the outcome of the consultation process is included at appendix 5.

- How have you considered equality and diversity?**

Please see section above.

- Key findings**

Please see section above.

- Actions**

As indicated in Section 3, the specific equality implications that arise from the Council's Budget will be addressed through Directorate and service budgets aligned to service plans that now include an equalities section. Within this process, all Directorates will complete or will have already completed an equality screening or analysis to ensure due regard has been given and that there is an understanding of the effects of a strategy, policy, service on those from a protected characteristic group. In addition, it is an expectation that appropriate mitigations are considered and put in place to manage any disproportionate impacts.

Date to scope and plan your Equality Analysis:	Upon development of proposals
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Date to complete your Equality Analysis:	Upon completion of proposals
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Lead person for your Equality Analysis (Include name and job title):	Relevant directorate leads as appropriate
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5. Governance, ownership and approval

Please state here who has approved the actions and outcomes of the screening:

Name	Job title	Date
Judith Badger	Executive Director Corporate Services	22 January 2026

6. Publishing

This screening document will act as evidence that due regard to equality and diversity has been given.

If this screening relates to a **Cabinet, key delegated officer decision, Council, other committee or a significant operational decision** a copy of the completed document should be attached as an appendix and published alongside the relevant report.

A copy of **all** screenings should also be sent to equality@rotherham.gov.uk For record keeping purposes it will be kept on file and also published on the Council's Equality and Diversity Internet page.

Date screening completed	22 January 2026
If relates to a Key Delegated Decision, Executive Board, Council or a Significant Operational Decision – report date and date sent for publication	Cabinet – 9 February 2026
Date screening sent to Performance, Intelligence and Improvement equality@rotherham.gov.uk	22 January 2026