PART A - Initial Equality Screening Assessment

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 (Part B).

Further information is available in the Equality Screening and Analysis Guidance – see page 9.

1. Title	
Title: Medium Term Financial Strategy	
Directorate: Finance and Customer Services	**Service area:** Financial Services
Lead person: Rob Mahon	**Contact number:** 01709 8254518
Is this a: ☐ **Strategy / Policy** ☑ **Service / Function** ☐ **Other** **If other, please specify**	

2. Please provide a brief description of what you are screening
The report sets out a technical update of the Council's Medium Term Financial Strategy to 2029/30. The information within the report will support the development of detailed budget proposals for 2027/28. No changes to the Council's approved budget and financial strategy are proposed within the report.

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, disability, sex, gender reassignment, race, religion or belief, sexual orientation, civil partnerships and marriage, pregnancy and maternity and other socio-economic groups e.g. parents, single parents and guardians, carers, looked after children, unemployed and people on low incomes, ex-offenders, victims of domestic violence, homeless people etc.

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

If you have answered no to all the questions above, please explain the reason

The report is a summary report of the Council's current Medium Term Financial Strategy, it makes no recommendations for action around investments, savings or anything that would change current approaches of the Council's service delivery.

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 before decisions are made**.**

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 using the prompts for guidance and complete an Equality Analysis (Part B).
• **How have you considered equality and diversity?** N/A
• **Key findings** N/A
• **Actions** N/A

Date to scope and plan your Equality Analysis:	N/A
Date to complete your Equality Analysis:	N/A
Lead person for your Equality Analysis (Include name and job title):	N/A

5. Governance, ownership and approval

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

Name	Job title	Date
Rob Mahon	Service Director – Financial Services	21/10/26

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	21/10/26
Report title and date	Medium Term Financial Strategy
If relates to a Cabinet, key delegated officer decision, Council, other committee or a significant operational decision – report date and date sent for publication	Cabinet – 16/11/26
Date screening sent to Performance, Intelligence and Improvement equality@rotherham.gov.uk	21/10/26