

<b>Report to:</b>	Cabinet		
<b>Date of meeting:</b>	05 February 2024		
<b>Report of:</b>	Lee Fallows, Director of Corporate Resources	<b>Report Number:</b>	33720
<b>Reporting Officer:</b>	Tony Glennon, Borough Treasurer		
<b>Contact Officer:</b>	Tony Glennon		
<b>Report title:</b>	Budget Report 2024/25		
<b><u>CONFIDENTIALITY</u></b>			
<b><u>Non- confidential</u></b>			
This report does not contain information which means it should be considered without the press or members of the public being present.			
<b>Purpose:</b>	To: <ul style="list-style-type: none"> <li>• present to members the forecast financial position for 2024/25</li> <li>• consolidate service budgets to provide the Council's overall 2024/25 budget;</li> <li>• consider the options for council tax for 2024/25;</li> <li>• report on the Financial Arrangements account for 2024/25.</li> </ul>		
<b>Recommendations:</b>	That Cabinet recommends to Council: <ol style="list-style-type: none"> <li>1) The budget for 2024/25</li> <li>2) The council tax for 2024/25</li> <li>3) That the Council Tax figures included in the report for the Mayoral Police and Crime Commissioner Precept and Mayoral General Precept (including Fire Services) are the recommended provisional amounts pending their formal approval</li> <li>4) The Retail Hospitality and Leisure Business Rates Relief Scheme and the general Discretionary Relief Framework 2024/25</li> <li>5) That the Empty Homes Property Premium comes into effect from April 2024</li> <li>6) That the Second Homes Premium comes into effect from April 2025</li> </ol>		
<b><u>Decision:</u></b>			
<b><u>Background documents:</u></b>	Local Council Tax Support Scheme 2020/21– Post Consultation Report 21st December 2020  Council tax Referendum Principles 20241 to 2025  Levelling Up and Regeneration Act 2023 Provisional Local Government Finance Settlement 18 <sup>th</sup> December 2023		
<b><u>Signed:</u></b>	Leader/Executive Cabinet Member	Monitoring Officer	
<b><u>Date:</u></b>			

<u>Consultation with other officers</u>			
Finance	Yes	25/01/2024	Tony Glennon
Legal	Yes	25/01/2024	Helen Gorman
HR	Yes	25/01/2024	Lee Fallows
Procurement	No		
Climate Change	No		
Information Governance	No		
Equality Impact Assessment	Yes	25/01/2024	Nicky Connell
<b>Post consultation reports</b> Please confirm that the consultation response has been taken into consideration in making the recommendations.			Yes
<b>Vision outcomes</b> Please identify the appropriate Vision outcome(s) that this report relates or contributes to by putting a cross in the relevant box.			<u>1. Start Well</u> <input checked="" type="checkbox"/>
			<u>2. Live Well</u> <input checked="" type="checkbox"/>
			<u>3. Age Well</u> <input checked="" type="checkbox"/>
			<u>4. Prosperous</u> <input checked="" type="checkbox"/>
			<u>5. Clean and Green</u> <input checked="" type="checkbox"/>
			<u>6. Strong and Distinctive</u> <input checked="" type="checkbox"/>

## **1 INTRODUCTION & BACKGROUND**

- 1.1 At the Cabinet meeting on 4th December 2023, members were updated on the current financial forecast for 2023/24 and the implication this had for 2024/25.
- 1.2 The November report to Cabinet identified a cuts requirement for 2024/25 of £10.9m. Since then, there have been further updates both nationally and locally which means this figure is now £8.6m. A summary is provided below in this report.
- 1.3 The original assumptions built into the 2024/25 budget include a 2.99% increase for the general council tax levy and 2.00% increase for the Adult Social Care Precept.
- 1.4 This report provides a further update on the impact of the local government finance settlement announced on 18th December 2023.

## **2 LOCAL GOVERNMENT SETTLEMENT 18<sup>th</sup> DECEMBER 2023**

- 2.1 The settlement itself was a one-year settlement with no commitment on actual local government funding from 2025/26 onwards, other than confirming that after this Spending Review period, planned departmental resource spending will continue to grow at 1% a year on average in real terms. This strongly implies real-terms cuts for unprotected local government services over the lifetime of the next parliament under the current plans. Key points to note for the 2024/25 settlement include:
  - 2.2 Core Spending Power (the grand total of all the council's income) to increase on average by 6.5%. It should be noted this increase is based upon the assumption that councils will increase their council tax by the maximum permissible.
  - 2.3 Services Grant 2024/25 (£434k) – this Grant was originally introduced in 2022/23 as one-off funding but continued into 2023/24 at a reduced level and for 2024/25 has now been reduced by a further £2.2m. The impact of this is shown lower down in the report.
  - 2.4 New Homes Bonus - a further year has been added to continue for 2024/25 (£475k).
  - 2.5 Social Care - No further funding increases for local government beyond those that had been previously announced, additional funding for the NHS and Adult Social Care announced in the Autumn Statement 2022 has been "reaffirmed". Grants aimed specifically at Social Care:
    - 2.5.1 Social Care Grant - an additional £4.6m on top of the £24.4 we already receive. This will be used to offset budgetary demand pressures.
    - 2.5.2 Adult Social Care Market Sustainability & Improvement Funds increased by £713k from the £5.37m received in 2023/24, to enable improvements to adult social care.
    - 2.5.3 Adult Social Care Discharge Fund increased by £1.4m from the £2.0m received in 2023/24, provided to speed up the discharge from hospital of persons requiring social care support and to be pooled with Better Care Funds
    - 2.5.4 Improved Better Care Fund £14.9m, remains unchanged from the 2022/23 funding level.
- 2.6 As in 2023/24, the Council Tax general levy is permitted to increase by up to 2.99% without the need for a referendum.
- 2.7 As in 2023/24, the Adult Social Care precept can increase by a maximum of 2% without the need for a referendum.

- 2.8 There was no announcement in respect of the Household Support Fund and as a result of the messages coming out of government we are assuming this will no longer be funded in 2024/25.
- 2.9 The Government has announced that the Business Rates Multiplier will be split between the small business rates multiplier and the standard multiplier from 1 April 2024. The small business multiplier will be frozen at 49.9p and the standard multiplier will be increased by September's CPI figure (6.7%), increasing the multiplier from 51.2p to 54.6p.

### **3 FINANCIAL IMPACT OF THE ABOVE**

- 3.1 The overall net impact of the December Settlement is a worsening of our funding position of circa £2.3m. This is outlined as follows:

	£m
Funding Gap above	2.5
Remove LWP Cut (no HSF scheme)	0.5
	-----
New Funding Gap	3.0
Contingency in December's Report	(0.7)
	-----
Funding Gap	2.3
	-----

- 3.2 The splitting of the Business Rates Multiplier impacts us positively. This is because almost 64% of Bolton's business rates income is generated from businesses subject to the CPI linked uplift of the standard (i.e. higher) multiplier described in paragraph 2.9 above, these businesses now pay 4.7p more than small businesses, a premium of around 9.4%.
- 3.3 In addition, during 2023/24 monitoring of the in-year business rates position has shown a better financial picture than originally forecast following the revaluation exercise last year.
- 3.4 With this in mind I am happy that we can increase our business rates forecast for 2024/25 to plug this financial gap.

### **4 LEVELLING UP AND REGENERATION ACT 2023**

- 4.1 The above Act came into effect towards the end of October 2023, the Act reduced the qualifying period over which a Council Tax premium in respect of Long Term Empty Property (LTE) properties can be charged from 2 years to 1 year and permitted implementation of the LTE premium from 1 April 2024, providing the decision is taken before the start of the financial year. The Act also reduced the qualifying period over which a Council Tax premium in respect of Second Homes (SH) properties can be charged from 2 years to 1 year and provided for the SH premium to be implemented from 1<sup>st</sup> April 2025, providing the decision is taken before 1st April 2024. The 2024/25 budget contains the following assumptions:
- 4.1.1 The introduction of a Long Term Empty Property (LTE) premium with effect from 1st April 2024 and inclusion of £0.6m into the budget to reflect this.
- 4.1.2 The introduction of the Second Homes (SH) premium with effect from 1st April 2025
- 4.2 During 2024/25 the Council Tax section will monitor the impact of the changes on the numbers of LTE properties and if it has any impact on SH property numbers

## 5 SAVINGS PROGRAMME 2024/25

- 5.1 Given the considerable financial uncertainty, both nationally and locally, it was proposed at December's Cabinet meeting that a one-year budget be presented to Council for approval in February 2024. This will comprise:
- 5.2 Use of reserves to balance the budget. This will mean that unachieved savings will be rolled forward into the 2025/26 budget cycle.
- 5.3 In addition, to achieve a balanced budget, it is proposed to include savings targets of £8.6m, the Council's net budget in 2023/24 excluding schools is £278m. The £8.6m cuts are allocated departmentally in the following table:

<b>Directorate</b>	<b>Allocation £'000s</b>
Adults & Housing	4,000
Children's	1,021
Public Health	477
Place	862
Chief Executive's & Corporate	2,284
<b>Total</b>	<b>8,644</b>

- 5.4 Options to achieve these cuts are included as Appendix C.

## 6 FINANCIAL PRESSURES

- 6.1 Inflation & interest rates - since the 2023/24 budget was set, continuing inflationary pressures, particularly for food and energy, have seen the UK inflation rate remain significantly above the Bank of England's target rate. In response, the Bank of England increased interest rates repeatedly to the current 5.25%, the highest level in 15 years, meaning household finances have become squeezed. It should be noted that, although the rate of inflation is forecast to fall during 2024/25, this does not necessarily mean that prices will reduce, merely that the size of price increases will be smaller than seen in 2023/24.
- 6.2 Social care pressures continue to have a major effect on the Council's budget with a continuing upward trend of increases in the volume in demand for Older People's care packages in the community especially homecare and discharges from hospital home and the increasing cost of external provision in Children's Social Care. The estimated 2024/25 additional costs are £9.9m.

## 7 GOVERNMENT SPENDING PLANS

- 7.1 As members will be aware, the council has had to find significant savings over the last 12 years, totaling around £224m by the end of 2023/24 with a further £8.6m to be found in 2024/25.
- 7.2 Beyond 2023/24 there are still some key funding issues yet to be confirmed which could impact further on the council.

### 7.3 Fair Funding Review (FFR)

7.3.1 As part of the 16/17 finance settlement, it was announced that there would be an FFR of authorities' funding needs, initially to be implemented in 2019/20. This was subsequently deferred by one year to 2020/21 and the Brexit debate pushed this further back to 2021/22, the Covid-19 pandemic pushed this back further to 2023/24; the government has now confirmed that the FFR will not happen during the lifetime of the current parliament.

7.3.2 According to the then titled Ministry of Housing, Communities and Local Government (MHCLG) terms of reference, the FFR will:

- Set new baseline funding allocations for local authorities,
- Look at an assessment of needs and resources of authorities.

### 7.4 Business Rates

7.4.1 Bolton has been a part of the Greater Manchester 100% business rates retention pilot since 2017. Councils retain 100% of their business rates with 1% passed to the Fire Authority. As part of the Greater Manchester Trailblazer devolution agreement, the Government has announced that GM authorities will continue to retain 100% of business rates locally for the next 10 years.

7.4.2 The business rates reset initially intended to be implemented in 2021/22 has also been deferred until at least 2025/26. This may take the form of either a full re-set or partial re-set. What this means is that any business rates growth that the council is expected to achieve over and above its baseline may either be fully taken or partially taken off the council. The government's rationale is that the overall business rates growth since the previous re-set in 2013 will be circa £2bn (if it is a full re-set), which it can then re-distribute to councils. Some of this growth is likely to have been lost in the last two years. This makes forecasting business rates beyond 2023/24 extremely difficult to do. In addition, it is not possible to project what the council could receive in some form of re-distributed grant from any potentially available funds.

7.4.3 It should be noted that some of the business rates growth achieved by the council as a direct result of the GM 100% business rates initiative can currently be retained locally.

7.4.4 The splitting of the Business Rates Multiplier outlined above requires the business rates billing systems for all local authorities to be updated; Capita have confirmed that the updated system used by Bolton (and other Councils) will not be available until February 2024, after the statutory deadline (31<sup>st</sup> January) for business rates forecasts for 2024/25. This further complicates the forecasting of business rates income for 2024/25 onwards.

## 8 GM BUSINESS RATES POOL

8.1 As in 2023/24 no new Pool agreement has been entered into for 2024/25.

## 9 EXPENDITURE FORECAST

9.1 Taking into account the above factors this is the expenditure forecast for 2024/25 and 2025/26

	Latest Budget 2023/24 100% Business Rates £000s	Forecast 2024/25 100% Business Rates £000s	Forecast 2025/26 100% Business Rates £000s
Expenditure			
Previous Year's Budget	477,797	515,979	563,449
Schools DSG Change	17,642	22,410	
<b>Non School Services</b>			
Inflation	19,724	15,115	14,998
Audit Fees increase			220
Levies	1,400	2,712	1297
Other Corporate	974	719	700
Adult Social Care Precept	2,558	2,700	2,849
Children's and Adult's Demand Growth		-2,500	
Insurance	146		
Demand / Inflation / Income Pressures	14,948	11,011	
Corporate Contribution	-11,001		
Reversal of unfunded demand pressure	-3,947	3,947	
<b>Indicative Savings Requirement</b>	<b>-4,263</b>	<b>-8,644</b>	<b>-20,614</b>
Budget Requirement	515,979	563,449	564,227

	Latest Budget 2023/24 100% Business Rates £000s	Forecast 2024/25 100% Business Rates £000s	Forecast 2025/26 100% Business Rates £000s
Resources			
Direct Schools Grant	237,944	260,354	260,354
Retained Local Business Rate	84,465	99,989	100,030
GMCA Growth contribution	-2,500	-3,500	-3,500
Section 31 Grants	26,954	31,894	32,053
Business Rates Top Up	24,243	25,713	26,745
Business Rates contribution to balances		-3,500	
Council Tax Contribution	127,917	135,014	142,460
Council Tax Contribution - Adult Social Care	2,558	2,700	2,849
Council Tax Contribution - General Levy	2,546	4,037	2,835
Collection Fund Balance		238	
Council Tax Long Term Empty Premium		600	400
Service Grant	2,648	434	
Contribution from / (to) reserves	8,878	9,000	
New Homes Bonus	326	475	
<b>Total</b>	<b>515,979</b>	<b>563,449</b>	<b>564,227</b>
Council Tax Increase (subject to Council approval)	3.99%	4.99%	3.99%

9.2 It should be noted that the indicative cuts target for 2025/26 is in excess of £20m. As outlined at November's Cabinet meeting this will be financially challenging to achieve and a programme of work will need to commence early in 2024/25.

9.3 A four-year Medium Term Financial Plan is included as Appendix B

## 10 FORECASTING CAUTION

- 10.1 As members will appreciate, the current economic situation means there continues to be considerable uncertainty in forecasting both expenditure and income.
- 10.2 With a general election anticipated around Autumn 2024 there is no expectation of any Local Government Finance review taking effect until 2026/27 at the earliest.
- 10.3 In 2016 councils received a 3-year settlement. Since then, settlements have been in one-year increments. We have received in-year additional funds, such as additional Social Care grants in 2022, sometimes with indicative allocations for the following year, but not always. This type of funding announcements has become “the norm” meaning the ability to provide any meaningful forecast beyond the next financial year has become extremely challenging.
- 10.4 The government’s levelling up agenda is intended to distribute funds more fairly across the country. This will only become apparent as the outcome of the Fair Funding Review is published, this will not take place during the current parliament.
- 10.5 There consider to be considerable pressures re Childrens Services

## 11 RESERVES

- 11.1 The Council estimates its reserves balance to be £172m at the end of 2023/24, excluding the Dedicated Schools Grant (DSG) and Collection Fund balances as detailed below

	01/04/2023	31/03/2024
	£m	£m
Reserves we cannot touch (schools etc...)	(21.04)	(17.34)
Reserves we must have (audit requirements)	(10.66)	(10.66)
Reserves to support the budget process	(32.90)	(16.30)
Reserves for known insurance claims / self-insurance	(22.50)	(22.50)
Reserves to fund our existing capital programme	(89.70)	(67.10)
Reserves set aside for revenue commitments (Looked after children etc)	(72.20)	(37.69)
Total Reserves (excluding DSG Deficit)	(249.00)	(171.59)
DSG Deficit	+18.19	+18.19
Overall Net Reserves Position	(230.81)	(153.40)

- 11.2 Appendix E provides some information on the implications of not holding these reserves.

## 12 FINANCIAL RISKS

- 12.1 Members will be aware that the Borough Treasurer has provided advice on the recommended level of Balances to be maintained previously. The full detail, including an identification of financial risks, is set out in Appendix F. However, in summary this advice is as follows:

- 12.1.1 Currently it is estimated that available Balances as at the 31st March 2024 will be £10.66m. The Borough Treasurer’s advice to Members is that, as a minimum, Balances of £10.0m or higher should be maintained, based upon the Borough Treasurer’ understanding of the risks and financial issues facing the Council over the next 3 years, and the proposals around the Budget, as identified in this report. Should Members wish to agree any additional items for growth or for savings not in this report, then the Borough Treasurer will need to advise Members as to whether or not those proposals would result in an increase in the financial risk



facing the Council, and therefore a need for a higher level of Balances to be set as a minimum. This will be subject to ongoing review.

### 13 BOLTON COUNCIL'S ELEMENT OF THE COUNCIL TAX

13.1 The Government has stated that the limit for 2024/25 for the general levy will be 2.99%

13.2 For the Adult Social Care (ASC) precept, the council can raise this by 2% in 2024/25

13.3 A 1% swing in the rate broadly equates to a £1.3m gain or loss in council tax income. This budget has been prepared as follows:

- the Adult Social Care precept is set at 2.00% for 2024/25.
- the general levy is set at 2.99% for 2024/25.

13.4 The table below shows the basic charge per band for Bolton (i.e. excluding Parish and Mayoral precepts):

	Bolton Charge 2023/24	Adult Social Care	General Levy	2024/25 Basic Council Tax
		2.00%	2.99%	
Band A	£1,125.08	£22.50	£33.64	<b>£1,181.22</b>
Band B	£1,312.62	£26.25	£39.25	<b>£1,378.12</b>
Band C	£1,500.11	£30.00	£44.85	<b>£1,574.96</b>
Band D	£1,687.64	£33.75	£50.46	<b>£1,771.85</b>
Band E	£2,062.66	£41.25	£61.67	<b>£2,165.58</b>
Band F	£2,437.71	£48.75	£72.89	<b>£2,559.35</b>
Band G	£2,812.72	£56.25	£84.10	<b>£2,953.07</b>
Band H	£3,375.28	£67.50	£100.92	<b>£3,543.70</b>

13.5 This equates to an additional £1.08 per week for Band A properties which are more than 44% of the overall tax base.

13.6 The amount generated from Council Tax is as follows:

		2023/24			2024/25	
		£	£		£	£
<b>Band D</b>						
Basic Council Tax - previous year		1,622.89			1,687.64	
Council Tax General Levy	1.99%	32.30		2.99%	50.46	
Council Tax Adult Social Care	2.00%	32.45		2.00%	33.75	
Basic Council Tax			1,687.64			1,771.85
Tax Base			78,820			80,001
Basic Council Tax Collected (£'000s)			133,021			141,750
Add Parish Precepts (£000s)			452			512
Council Tax Collected (£000s)			133,473			142,262

## 14 MAYORAL PRECEPT (tbc)

14.1 Since 2018/19 the Mayor for Greater Manchester has taken responsibility for both the GM Police and Crime Commissioner and GM Fire and Rescue Authority services. Greater Manchester Combined Authority now sets two precepts:

- Mayoral Police and Crime Commissioner Precept; and
- Mayoral General Precept (including Fire Services)

14.2 With regard to the Mayoral General Precept this is used specifically for initiatives to develop and enhance the whole Greater Manchester region.

14.3 Increases in the Mayoral Precepts are added onto the council tax charge set by Bolton. For 2024/25 the amounts are as follows

14.3.1 For the Mayoral General (including Fire Services) a £5 / 4.63% increase (tbc)

14.3.2 A £13 / 5.34% increase for the Mayoral Police and Crime Commissioner Precept (tbc)

14.4 The table below shows the additional cost on each band for the Mayoral precepts:

	Mayoral General Precept (including Fire Services) (tbc)	Mayoral Police and Crime Commissioner Precept (tbc)
	£5 (4.63%) Increase	£13 (5.34%) Increase
Band A	£75.29	£170.87
Band B	£87.85	£199.34
Band C	£100.40	£227.81
Band D	£112.95	£256.30
Band E	£138.04	£313.25
Band F	£163.14	£370.21
Band G	£188.24	£427.17
Band H	£225.90	£512.60

14.5 Should the final decisions of the GMCA be different, then this will be reported to Members at the Council meeting.

## 15 PARISH PRECEPTS (tbc)

15.1 The individual parish precepts are shown below with comparative figures for last year:

	2022/23	2023/24	Increase
	£	£	%
Blackrod	£73,810	£80,810	9.48%
Horwich	£225,402	£274,990	22.00%
Westhoughton	£152,854	£156,224	2.20%

15.2 As required by the Local Government Finance Act 1992, the Parish Precepts need to be added to Bolton's budget requirement.

15.3 The Council Tax bases for tax setting purposes for the Town Council areas are as follows:

	Tax Base in Band D Equivalents 2024/25
Blackrod	1,989
Horwich	7,634
Westhoughton	8,993

15.4 The resultant additional Council Tax in each Town Council area is as follows:

	Blackrod	Horwich	Westhoughton
Band A	£27.09	£24.01	£11.58
Band B	£31.60	£28.02	£13.51
Band C	£36.12	£32.02	£15.44
Band D	£40.63	£36.02	£17.37
Band E	£49.66	£44.02	£21.23
Band F	£58.69	£52.03	£25.09
Band G	£67.72	£60.03	£28.95
Band H	£81.26	£72.04	£34.74

## 16 OVERALL COUNCIL TAX

16.1 Taking into account the Bolton Council general and adult social care Council Tax rises plus Mayoral and Parish precepts, the table below shows the overall charges to Bolton residents.

	Parish of Blackrod	Parish of Horwich	Parish of Westhoughton	All other parts of the Council's area
Band A	£1,454.47	£1,451.39	£1,438.96	£1,427.38
Band B	£1,696.91	£1,693.33	£1,678.82	£1,665.31
Band C	£1,939.29	£1,935.19	£1,918.61	£1,903.17
Band D	£2,181.73	£2,177.12	£2,158.47	£2,141.10
Band E	£2,666.53	£2,660.89	£2,638.10	£2,616.87
Band F	£3,151.39	£3,144.73	£3,117.79	£3,092.70
Band G	£3,636.20	£3,628.51	£3,597.43	£3,568.48
Band H	£4,363.46	£4,354.24	£4,316.94	£4,282.20

16.2 The overall increase equates £1.31 per week for a non-Parish Band A property.

16.3 A Draft Substantive Council Tax Resolution is set out in Appendix H.

## 17 COUNCIL TAX BILLING

17.1 The Budget contained in this report assumes that the Council Tax is set at the Council meeting on the 14th February 2024. Should the Council not be able to set the Council Tax on that day then a week's delay will put back the processing and distribution of Council Tax bills, which will incur additional costs.

## **18 BUSINESS RATES**

- 18.1 Whilst the Council is part of the Greater Manchester Devolution Deal, it should be noted that the Government determines the rates to be collected - the “multiplier”.
- 18.2 All non-domestic properties are usually revalued at five-yearly intervals. From 1 April 2023, the rateable values of all non-domestic properties in England were updated to reflect the property market as at 1 April 2021. The rateable value of a property is broadly equivalent to the annual rent that a property could be let for on the open market. These values are set by the Valuation Office Agency (VOA). A property’s rates bill is calculated by multiplying its rateable value by the NNDR ‘multiplier’.
- 18.3 Bolton Council’s Rateable Value list as at December 2023 is £249.3m. This is an increase of 5.7% from the December 2022 list (£235.9m).

## **19 IMPACTS AND IMPLICATIONS**

### **19.1 Financial**

19.1.1 See above.

### **19.2 Legal**

19.2.1 None

### **19.3 HR**

19.3.1 See staffing impact above

### **19.4 Climate Change**

19.4.1 No

### **19.5 Information Governance**

19.5.1 No

### **19.6 Other**

19.6.1 No

## **20 CONSULTATION SUMMARY**

- 20.1 Between 5th December 2023 and 9<sup>th</sup> January 2024 Bolton Council ran a public consultation, seeking feedback on the proposals to make £9.1 million of savings. During this period 618 residents and stakeholders engaged in the consultation process, with one formal response being received from Bolton Neighbourhood Watch. The consultation summary response is in Appendix J respectively and the full consultation response is provided as a separate link to the agenda.

## **21 EQUALITY IMPACT ASSESSMENT (EIA)**

- 21.1 Under the Equality Act 2010, the council has a general duty to have due regard to the need to:

1. **eliminate unlawful discrimination**, harassment, victimisation and any other conduct prohibited by the Act;
2. **advance equality of opportunity** between people who share a protected characteristic and people who do not share it; and

3. **foster good relations** between people who share a protected characteristic and people who do not share it.

21.2 It is important to consider how the proposals contained within this report may impact positively or negatively on protected characteristics.

21.3 Due to the nature of the proposals, it is possible that there could be some adverse impact for the following groups: age, disability, caring status, gender, and socio-economic deprivation. This analysis is set out in more detail in the full EIA included at **Appendix I**.

21.3 As part of any Service Review/New Policy/Business Improvement Review a full EIA will be undertaken.

## **22 RECOMMENDATIONS**

22.1 The Cabinet recommends to Council:

- (i) The Budget for 2024/25
- (ii) The Council Tax for 2024/25
- (ii) That the Council Tax figures included in the report for the Mayoral Police and Crime Commissioner Precept and Mayoral General Precept (including Fire Services) are the recommended provisional amounts pending their formal approval
- (iii) The Retail Hospitality and Leisure Business Rates Relief Scheme and the general Discretionary Relief Framework
- (iv) That the Empty Homes Property Premium comes into effect from April 2024
- (v) That the Second Homes Premium comes into effect from April 2025

## **23 APPENDICES**

Appendix A	General Fund Summary
Appendix B	Subjective Analysis
Appendix C	Savings Options 2024-25
Appendix D	The Financial Arrangements Account
Appendix E	Review of Reserves
Appendix F	General Fund Balances / Financial Risks
Appendix G	Council Tax (Non-Parish Council Areas)
Appendix H	Draft Substantive Council Tax Resolution
Appendix I	Equality Impact Assessment
Appendix J	Consultation Questionnaire
Appendix K	Consultation Feedback Summary
Appendix L	Full Consultation Feedback Report (separate to this report)
Appendix M	Consultation response from Bolton Neighbourhood Watch

## GENERAL FUND SUMMARY

	2023/24	2024/25	2025/26
	Original Budget	Original Estimate	Original Estimate
	£000	£000	£000
Children's Services	283,232	315,449	319,909
Adult Services	71,448	83,538	90,194
Public Health	17,821	17,794	18,131
Environmental Services	21,456	22,185	22,718
Development & Regeneration	7,503	4,220	4,307
Housing	1,502	2,335	2,385
Central etc	41,903	52,244	55,918
Financing and Investing	16,352	17,052	17,052
Levies	40,747	43,000	44,997
Other Financial Services	14,014	5,633	9,233
Savings to be allocated	0	0	(20,614)
<b>Net Exp</b>	<b>515,978</b>	<b>563,449</b>	<b>564,227</b>
Parishes	452	512	512
<b>Sub Total</b>	<b>516,430</b>	<b>563,961</b>	<b>564,739</b>
<b>Income</b>			
Direct Schools Grant	237,944	260,354	260,354
Retained local business rates	106,585	127,049	129,083
GMCA Growth Contribution	(2,500)	(3,500)	(3,500)
Business Rates Top-Up	24,243	25,713	26,745
Business Rates contribution to balances	0	(3,500)	0
Council Tax Contribution - Base Adjustment	127,917	135,014	142,460
Council Tax Contribution - Adult Social Care	2,558	2,700	2,849
Council Tax Contribution - General Levy	2,546	4,037	2,835
Council Tax contribution – Parishes	452	512	512
Council Tax Long Term Empty Premium	0	600	400
Collection Fund Balance	4,834	5,072	3,000
New Homes Bonus	325	475	0
Services Grant	2,648	434	0
Reserves	8,878	9,000	0
<b>Total</b>	<b>516,430</b>	<b>563,961</b>	<b>564,739</b>
Council Tax Increase	3.99%	4.99%	3.99%

**SUBJECTIVE ANALYSIS**

	2023/24 Original Estimate £000's	2024/25 Original Estimate £000's
Expenditure		
Employees	270,236	289,480
Premises	35,275	36,197
Transport	10,869	10,046
Supplies and Services	115,419	113,807
Agency / Third Party	213,988	246,124
Transfer Payments	94,410	107,081
Capital Costs	19,206	19,908
<b>Total Expenditure</b>	<b>759,403</b>	<b>822,643</b>
Income		
Grants & Contributions	171,231	182,098
Customer & Client Receipts	64,108	70,564
Rent	5,699	4,150
Interest & Dividends	2,387	2,382
<b>Total Income</b>	<b>243,425</b>	<b>259,194</b>
Net Expenditure *	515,978	563,449
* Before Direct Schools Grant of	237,944	260,354

## Adults' and Housing Directorate

AREA	DETAIL	BUDGET 2023/24	SAVINGS 2024/25	ESTIMATED STAFFING IMPACT			
		£'000	£'000	FTE IN SCOPE	FTE DELETED	FTE VACANT	FTE DISPLACED
Implementation of the demand strategy for Adult social care and Housing need services.	Review of care packages, placements and housing demand including changes to how deliver statutory functions, right care, right place.	Expenditure budget £102,548	4,000	0	0	0	0
<b>Total Cuts Options for Adults' &amp; Housing</b>			<b>4,000</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>



## Children's Services Directorate

OPTION		BUDGET 2023/24	SAVINGS 2024/25	ESTIMATED STAFFING IMPACT			
		£'000	£'000	FTE IN SCOPE	FTE DELETED	FTE VACANT	FTE DISPLACED
Service Efficiencies	Maximising process and digital efficiencies	5,000	221	0	0	0	0
	Reviewing all the controllable budgets within the Directorate and streamlining processes.						
Review of Income Opportunities	Rationalising current structures while maximising use of buildings and income opportunities across the centres. Looking at other income opportunities across the department.	1,616	200	0	0	0	0
Review of Non Statutory Subsidy on Transport	Review of processes, policies, structures and income opportunities for the subsidies relating to children's transport.	4,068	200	0	0	0	0
Review of Staffing across Children's	Vacancy management across the directorate	39,873	100	TBC	2	2	0
Review of Early Help model	Review of processes, policies, structures and income opportunities for Early Help.	2,200	300	0	0	0	0
<b>Total Cuts Options for Children's Services</b>		<b>52,757</b>	<b>1,021</b>	<b>0</b>	<b>2</b>	<b>2</b>	<b>0</b>

**Public Health Directorate**

OPTION		BUDGET 2023/24	SAVINGS 2024/25	ESTIMATED STAFFING IMPACT			
		£'000	£'000	FTE IN SCOPE	FTE DELETED	FTE VACANT	FTE DISPLACED
Contract Efficiencies and Inflation	Review of all contracts and inflation applied across the department.	13,359	397	0	0	0	0
Vacancy Management	Deletion of vacant posts.	1,579	80	18.1	1.3	1.3	0
<b>Total Cuts Options for Public Health</b>		<b>14,938</b>	<b>477</b>	<b>18.1</b>	<b>1.3</b>	<b>1.3</b>	<b>0</b>

## Place Directorate

OPTION	More Details	BUDGET 2023/24	SAVINGS 2024/25	ESTIMATED STAFF IMPACT			
		£'000	£'000	FTE IN SCOPE	FTE DELETED	FTE VACANT	FTE DISPLACED
Paper collection changes	Move to 4 weekly collection of pulpable waste		412				
Highways - Dim and Trim the Street Lighting	Dim and trim street lighting across both residential roads and the wider network. As well as providing a cashable saving, this also provides a carbon reduction of 370 tonnes	2,279	450	0	0	0	0
<b>Total Cuts Options for Directorate of Place</b>			<b>862</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

## Corporate Resources Directorate

OPTION	More Details	BUDGET 2023/24	SAVINGS 2024/25	ESTIMATED STAFF IMPACT			
		£'000	£'000	FTE IN SCOPE	FTE DELETED	FTE VACANT	FTE DISPLACED
Review Libraries	Review alternative delivery of 2 community libraries. There are 10 libraries in total	4,055	103	82.6	1.98		1.98
<i>Remove ICT revenue projects budget</i>	ICT projects will be funded by Capital	500	304	N/a			
Cancel Stribe, staff consultation tool.	Investigating an in house solution	60	60	N/a			
Increase in commercial activities across the Directorate	Look at opportunities across the directorate such as sponsorship and charging opportunities	N/a	100	N/a			
Mayoralty	Consider event sponsorship / reduced event expenditure	217	17	3			
Corporate	Debt re-modelling & redemption		1,700				
<b>Total Cuts Options Chief Executive's &amp; Corporate</b>			<b>2,284</b>	<b>85.6</b>	<b>1.98</b>	<b>0</b>	<b>1.98</b>

**THE FINANCIAL ARRANGEMENTS ACCOUNT**

	2023/24 Original £'000s	2024/25 Original £'000s
Corporate Financing Costs	15,616	16,316
Transferred Debt	1,507	1,507
Interest and Contributions	-377	-377
Airport Dividend	0	0
Airport Rents	-414	-414
Airport Loan Interest		
Debt Management	20	20
Total Financing and Investing	16,352	17,052
Levies	40,747	43,000
Former Employee Pensions	852	852
Car Parks	-350	-350
Miscellaneous	4,982	2,013
Apprenticeship Ley	500	500
Other	8,031	2,600
Sub-total	14,015	5,615
Financing		
Use of Reserves	-8,878	-9,000
Low Tier Grant	0	0
LTCS Support Grant	0	0
GMCA Growth Contribution	2,500	3,500
Services Grant	-2,648	-434
New Homes Bonus	-326	-475
Total Miscellaneous	-9,352	-6,409
Total	61,762	59,258

**RESERVES****Revenue Impact of not holding key Reserves**

If we were not to hold these reserves, then there would be a direct impact on the Revenue Budget in the order of £6m. This would be from having to provide a Contingency Budget to meet certain risks or additional costs that the Council will be facing in the future. These are set out below:-

	<b>£m</b>
ICT replacements (would need an annual contribution to meet these costs)	2.0
Redundancy/redeployment (if we did not hold Reserves we would have to capitalise these costs – if Government agree)	2.0
Corporate contingencies – Energy etc. (would need a specific Contingency provision)	1.0
Service contingencies (would need a specific contingency provision)	1.0
	<u>6.0</u>

**GENERAL FUND BALANCES**

<b>Report to:</b>	Cabinet		
<b>Date of meeting:</b>	5 <sup>th</sup> February 2024		
<b>Report of:</b>	Borough Treasurer	<b>Report number:</b>	
<b>Contact officer:</b>	Tony Glennon	<b>Telephone number</b>	
<b>Report title:</b>	General Fund Balances 2024/25		
<b>Not confidential</b>			
This report does not contain information which warrants its consideration in the absence of the press or members of the public.			
<b>Purpose:</b>	To outline the Borough Treasurer' advice on the Financial Risks facing the Council and the appropriate level of Balances to be maintained		
<b>Recommendations:</b>	That the minimum level of Balances for 2024/25 should be £10.0m or higher if possible.		
<b>Decision:</b>			
<b>Background documents:</b>			
<b>Date:</b>			
<b>Consultation with other officers</b>			
Finance	Yes	Tony Glennon	
Legal	No		
HR	No		
Equality Impact Assessment required?	No		
<b>(a) Pre-consultation reports</b>		No	
Is there a need to consult on the proposals?			
<b>(b) Post consultation reports</b>		No	
Please confirm that the consultation response has been taken into consideration in making the recommendations.			
<b>Vision outcomes</b>	1. Start Well		X
Please identify the appropriate Vision outcome(s) that this report relates or contributes to by putting a cross in the relevant box.	2.Live Well		X
	3.Age Well		X
	4.Prosporous		X
	5. Clean and Green		X
	6.Strong and Distinctive		X

## 1 INTRODUCTION

- 1.4 The Council maintains two types of revenue reserves, earmarked reserves and general reserves (Balances). Earmarked reserves are set aside for specific purposes/ commitments whereas general Balances are maintained to support the overall Council's cash-flow and meet any unforeseen contingencies/demands.
- 1.5 This report considers the current level of general Balances, evaluates the reasons why Balances are maintained (i.e. the general financial risks facing the Council) and provides advice on the appropriate level of Balances to be maintained by the Council in the light of Guidance from the Chartered Institute of Public Finance and Accountancy (CIPFA).
- 1.6 NEED FOR GENERAL BALANCES
- 1.6.1 Whilst the Council's annual Budget provides resources to meet any known liabilities or expenditure requirements, Balances are amounts which are set aside to meet unexpected changes in the Budget and to finance demands for resources which cannot be predicted and are assessed on the basis of the general financial risks facing the Council.
- 1.6.2 The requirement for Balances is acknowledged in statute with Section 32 of the 1992 Local Government Finance Act requiring Authorities to have regard to the level of Balances needed to meet estimated future liabilities when calculating their Budget requirement. The Chief Finance Officer has the responsibility to ensure that the Council maintains a balanced Budget with powers under Section 114 of the 1998 Local Government Finance Act to report to the Council should its liabilities be in danger of exceeding its resources. Equally, the External Auditor has a responsibility to review and report on the Council's financial standing. Further requirements within the 2003 Local Government Finance Act reinforce the above with additional monitoring and reporting responsibilities.
- 1.6.3 In drawing together the Council's capital and revenue budgets and the Medium-Term Financial Statement, the level of general Balances and Financial Risks are always carefully considered. The provision of an appropriate level of Balances is therefore a fundamental part of prudent financial management.
- 1.7 MINIMUM LEVEL OF RESERVES
- 1.7.1 Authorities should maintain Balances equivalent to 3% of their Budget, for 2024/25 this would amount to approximately £16m. However, whilst this is recommended guidance, the decision on the appropriate level of Balances is one for the Council, with advice from the Borough Treasurer, to determine. There are several factors/financial risks that need to be taken into account in considering what is a prudent level of Balances:
- 1.8 Revenue Contingencies
- 1.8.1 The Council does not maintain a general contingency within its revenue budget but relies on in year savings and Balances to meet any unexpected demands. For example, a pay increase of 0.5% more than that allowed for in the Budget would cost approximately £0.65m, excluding Teachers. A price variation of 0.5% would cost approximately £3.5m.
- 1.9 Interest
- 1.9.1 In recent years the Council has been successful in managing the interest that it pays out/receives and savings in this area have generally added to Balances. During 2023/24 the



Bank of England has increased interest rates repeatedly in response to rising inflation, from a historic low of 0.1% in November 2021 to the current 15 year high of 5.25%. It is expected, but not certain, that interest rates will reduce during 2024/25.

## 1.10 Capital

1.10.1 The Council's capital programme including the Town Hall Strategy is in the order of £200m. Within the capital programme there are no contingencies and whilst the programme is actively monitored and managed, there is the potential for a demand on Balances from any capital overspend. In addition, because of the economic climate there has been difficulties in generating a level of capital receipts contribution to fund the capital programme.

## 1.11 Economic Climate

1.11.1 The challenging economic climate continues to create pressures for the Council in several ways. Demand for services, particularly those to support the elderly and looked after children is continuing to increase, in addition, several of the income/revenue streams may be affected by reduced demand/take up. A CPI inflation rate continuing at a rate far in excess of the Bank of England's target rate during 2023/24 has led to significant cost pressures, particularly for energy and fuel costs. The above items have been reflected in the budget but the change in demand cannot be absolutely forecast and therefore there may be changes in cost/income levels during the year.

## 1.12 Council Tax Support Scheme

1.12.1 From 1<sup>st</sup> April 2013 the Council introduced a Local Council Tax Support Scheme. The full risk of increasing numbers of claimants and greater individual claimant eligibility remains within the Council and is a risk to the Council's resources.

## 1.13 Local Business Rates

1.13.1 Prior to 2013, all business rates collected by local authorities were paid over to the Government. This money was distributed back to local authorities by the Government in the form of grants.

1.13.2 From 2013 local authorities could retain up to 50% of business rates collected (the 'local' share) with the remaining 50% (the 'central' share) paid to the Government. This central share was distributed back to councils in the form of reduced grants. The Government introduced a system of top-ups and tariffs to redistribute income between councils so that councils with higher needs or less capacity to raise their own business rates were compensated.

1.13.3 In April 2017, Greater Manchester local authorities formed the Greater Manchester 100% Business Rates Retention Pilot. There was a corresponding reduction in government grants to reflect the increase in retained business rates.

1.13.4 A move to a 100% retention scheme doubles the risk to a council of a loss of income due to non-collection. In the current economic climate this risk is significant. For 2024/25 Bolton Council's share of the provision set aside and charged against revenue is estimated at £1.6m. The Government provides an overall safety net that is designed to protect councils if their business rates income falls significantly in the year – however the safety net is set at 97% of a council's baseline funding level (in the case of Bolton Council this represents a loss of

approximately £11.6m before safety net is triggered) – the Council may potentially have to cover losses up to this amount from its General Balances.

#### 1.14 Un-predictable Demand Led Expenditure

1.14.1 Major parts of the Council’s Budget, particularly in Social Care Services and Education are “demand led” and as we have seen in previous years, can create significant demands for increased expenditure during the year. Services maintain modest reserves of their own, to meet minor budget variations.

#### 1.15 Emergencies

1.15.1 The Council is required to maintain provision to meet the cost of emergencies that cannot be met from main Budgets or by Insurance. Significant costs on emergencies are met by Central Government under the “Bellwin Scheme” but these are only triggered once the Council’s expenditure has exceeded a pre-determined limit (0.1% of the revenue budget which is approximately £563k). Costs above this limit are covered by Central Government but only up to 85%.

#### 1.16 Unexpected Demands

1.16.1 Balances also need to provide sufficient resources to meet unexpected demands, particularly those that result from a legal decision, a change in Government legislation or a determination of Government legislation. In the past the Council has had to fund several major issues of this nature.

#### 1.17 Service Deficits

1.17.1 Balances are also required to offset any Budget deficits carried forward or generated during the year by services as allowed under Financial Regulations.

#### 1.18 General Risks

1.18.1 It is also important to weigh up the general risks facing the Council and evaluate what any potential financial impact may result from these risks. The Borough Treasurer and the Head of Internal Audit and Risk have undertaken a review of these risks. The areas with a potentially significant financial impact are as follows:

- Economic Climate
- Changes in Government Funding
- Potential Legal Claims
- External Suppliers going into Administration

1.18.2 These have been taken into account in the overall evaluation of the minimum level of Balances to maintain.

#### 1.19 REVIEW OF 2023/24 BALANCES POSITION

1.19.1 The last quarterly report estimated available Balances at 31<sup>st</sup> March 2024 at £10.7m. It is difficult to predict whether the economic climate will add further to the demands on the Council’s services or reduce further the income we receive. I am recommending that the current minimum level of Balances be increased to £14m in 2024/25.

## 1.20 BOROUGH TREASURER ADVICE ON THE MINIMUM LEVEL OF BALANCES

- 1.20.1 Section 25 of the Local Government Act 2003 requires the Section 151 Officer (Borough Treasurer) to report to the Council when it is setting its Budget/Council Tax on the “robustness of the estimates” and the “adequacy of the reserves”.
- 1.20.2 Equally the Council should not hold usable Balances at too high a level as this would not be making the most effective use of the Council’s overall resources when faced with significant demands for increased levels of service. Even allowing for a recommended level of Balances of £16m above, Balances of up to £18m would not be regarded as inappropriate.
- 1.20.3 At this point in time, bearing in mind the above and the size of the Council’s Budget at approximately £563m, I would recommend that a minimum level of Balances for the Council to maintain would be £14m (but, if possible should be at a higher level).

## 1.21 USE OF BALANCES

- 1.21.1 Any future use of Balances above the recommended level is best used to support “one off” initiatives/investment. Any significant use of Balances to meet the on-going costs of services should only be considered on the basis of providing a Revenue contribution for the period of the Medium-Term Financial Strategy.

## 1.22 SUMMARY

- 1.22.1 The report has set out the various factors that influence the level of Balances which must be maintained to meet any unexpected increases in expenditure or shortfall in income during the year. The Borough Treasurer’s advice is that as a minimum Balances should be increased to £14m but if possible, should be at a higher level.

**COUNCIL TAX (NON PARISH AREAS INCLUDING POLICE & MAYORAL GENERAL)**

	Properties	2023/24	2024/25	Increase
	%			
Band A	45.13	£1,359.24	£1,427.38	5.01%
Band B	18.66	£1,585.81	£1,665.31	5.01%
Band C	16.62	£1,812.32	£1,903.17	5.01%
Band D	9.98	£2,038.89	£2,141.10	5.01%
Band E	5.35	£2,491.95	£2,616.87	5.01%
Band F	2.24	£2,945.06	£3,092.70	5.01%
Band G	1.81	£3,398.13	£3,568.48	5.01%
Band H	0.22	£4,077.78	£4,282.20	5.01%

The Mayoral Police and Crime Commissioner Precept in percentage terms equates to a **6.6%** increase.

The Mayoral General Precept (including Fire Services) is a **4.9%** increase.

The tables below show how the cumulative element of the Adult Social Care precept needs to be shown on council tax bills

<b>Band A</b>	Basic Council Tax	Adult Social Care Precept	Total	% Increase
2023/24 Council Tax Base (excl Precepts)	£974.92		£974.92	
2016/17 Adult Social Care Precept		£17.02	£17.02	
2017/18 Adult Social Care Precept		£26.43	£26.43	
2018/19 Adult Social Care Precept		£18.46	£18.46	
2019/20 Adult Social Care Precept		£9.69	£9.69	
2020/21 Adult Social Care Precept		£19.81	£19.81	
2021/22 Adult Social Care Precept		£25.27	£25.27	
2022/23 Adult Social Care Precept		£11.85	£11.85	
2023/24 Adult Social Care Precept		£21.63	£21.63	
2023/24 Council Tax Base	£974.92	£150.16	£1,125.08	
General Levy 2024/25	£33.64		£33.64	2.99%
Adult Social Care Precept Levy 2024/25		£22.50	£22.50	2.00%
Total 2024/25 (excluding Greater Manchester Combined Authority (GMCA) Precepts)	£1,008.56	£172.66	£1,181.22	
GMCA Precepts				
Mayoral Police and Crime Commissioner Precept			£170.87	
Mayoral General Precept (including Fire Services)			£75.29	
<b>Total Charge 2024/25</b>	<b>£1,008.56</b>	<b>£172.66</b>	<b>£1,427.38</b>	
	This will appear as an item on the Council Tax bill	This will appear as an item on the Council Tax bill		

## APPENDIX G (cont'd)

<b>Band D</b>	Basic Council Tax	Adult Social Care Precept	Total	% Increase
2023/24 Council Tax Base (excl Precepts)	£1,462.39		£1,462.39	
2016/17 Adult Social Care Precept		£25.53	£25.53	
2017/18 Adult Social Care Precept		£39.64	£39.64	
2018/19 Adult Social Care Precept		£27.69	£27.69	
2019/20 Adult Social Care Precept		£14.54	£14.54	
2020/21 Adult Social Care Precept		£29.72	£29.72	
2021/22 Adult Social Care Precept		£37.90	£37.90	
2022/23 Adult Social Care Precept		£17.78	£17.78	
2023/24 Adult Social Care Precept		£32.45	£32.45	
2023/24 Council Tax Base	£1,462.39	£225.25	£1,687.64	
General Levy 2024/25	£50.46		£50.46	2.99%
Adult Social Care Precept Levy 2024/25		£33.75	£33.75	2.00%
	£1,512.85	£259.00	£1,771.85	
Combined Authority (GMCA) Precepts				
GMCA Precepts				
Mayoral Police and Crime Commissioner Precept			£256.30	
Mayoral General Precept (including Fire Services)			£112.95	
<b>Total Charge 2024/25</b>	<b>£1,512.85</b>	<b>£259.00</b>	<b>£2,141.10</b>	
	This will appear as an item on the Council Tax bill	This will appear as an item on the Council Tax bill		

**DRAFT SUBSTANTIVE COUNCIL TAX RESOLUTION**

- (i) That the following recommendations of the Cabinet on 5<sup>th</sup> February 2024 be approved:-
- (a) The Council be recommended to approve the Budget for 2024/25
  - (b) That the Council Tax for 2024/25 be increased by 4.99% comprising
    - The Adult Social Care Precept at 2.00%
    - The general levy at 2.99%
  - (c) The Council be recommended to approve the Capital Programme and Strategy for 2024/25
  - (d) The Council be recommended to approve the Investment and Prudential Indicators and Treasury Strategies 2024/25 to 2026/27

(ii) It be noted that on 4<sup>th</sup> December 2023 the Cabinet calculated

- (a) the Council Tax Base 2024/25 for the whole Council area as 80,001 (item T in the formula in Section 31B of the Local Government Finance Act 1992, as amended (the “Act”); and
- (b) for dwellings in those parts of its area to which a Parish precept relates as:

**Parish Councils**

The Parish of Blackrod	1,989	Band D equivalents
The Parish of Horwich	7,634	Band D equivalents
The Parish of Westhoughton	8,993	Band D Equivalents

being the amounts calculated by the Council, in accordance with regulation 6 of the Regulations, as the amounts of its Council Tax base for the year 2024/25 for dwellings in those parts of its area to which one or more special items relate.

- (iii) Calculate that the Council Tax requirement for the Council’s own purposes for 2024/25 (excluding Parish precepts) is £141,750,339.
- (iv) That the following amounts be calculated for the year 2024/25 in accordance with Sections 31 to 36 of the Act.
- (a) £302,768,201 being the aggregate of the amounts which the Council estimates for the items set out in Section 31A(2) of the Act taking into account all precepts issued to it by Parish Councils.
  - (b) £160,505,838 being the aggregate of the amounts which the Council estimates for the items set out in Section 31A(3) of the Act.
  - (c) £142,262,363 being the amount by which the aggregate at (iv)(a) above exceeds the aggregate at (iv)(b) above, calculated by the Council in accordance with Section 31A(4) of the Act as its Council Tax requirement for the year. (Item R in the formula in Section 31B of the Act).
  - (d) £1,778.25 being the amount at (iv)(c) above (Item R), all divided by Item T ((ii)(a) above), calculated by the Council, in accordance with Section 31B of the Act, as the basic amount of its Council Tax for the year (including Parish precepts).

(e)	£512,024	being the aggregate amount of all special items (Parish precepts) referred to in Section 34(1) of the Act, each individual parish precept being: Blackrod £80,810 Horwich £274,990 Westhoughton £156,224						
(f)	£1,771.85	being the amount at (iv)(d) above less the result given by dividing the amount at (iv)(e) above by Item T (ii)(a) above), calculated by the Council, in accordance with Section 34(2) of the Act, as the basic amount of its Council Tax for the year for dwellings in those parts of its area to which no Parish precept relates.						
(g)	Part of the Council's Area	<table border="0"> <tr> <td>Parish of Blackrod</td> <td style="text-align: right;">£1,812.48</td> </tr> <tr> <td>Parish of Horwich</td> <td style="text-align: right;">£1,807.87</td> </tr> <tr> <td>Parish of Westhoughton</td> <td style="text-align: right;">£1,789.22</td> </tr> </table>	Parish of Blackrod	£1,812.48	Parish of Horwich	£1,807.87	Parish of Westhoughton	£1,789.22
Parish of Blackrod	£1,812.48							
Parish of Horwich	£1,807.87							
Parish of Westhoughton	£1,789.22							

being the amounts given by adding to the amount at (f) above the amounts of the special item or items relating to dwellings in those parts of the Council's area mentioned at (e) above divided in each case by the amount at (ii) above, calculated by the Council, in accordance with Section 34(3) of the Act, as the basic amounts of its Council Tax for the year for dwellings in those parts of its area to which one or more special items relate.

(i) Part of the Council's Area

Valuation bands	Parish of Blackrod	Parish of Horwich	Parish of Westhoughton	All other parts of the Council's area
A	£1,208.31	£1,205.23	£1,192.80	£1,181.22
B	£1,409.72	£1,406.14	£1,391.63	£1,378.12
C	£1,611.08	£1,606.98	£1,590.40	£1,574.96
D	£1,812.48	£1,807.87	£1,789.22	£1,771.85
E	£2,215.24	£2,209.60	£2,186.81	£2,165.58
F	£2,618.04	£2,611.38	£2,584.44	£2,559.35
G	£3,020.79	£3,013.10	£2,982.02	£2,953.07
H	£3,624.96	£3,615.74	£3,578.44	£3,543.70

being the amounts given by multiplying the amounts at (f) and (g) above by the number which, in the proportion set out in Section 5(1) of the Act, is applicable to dwellings listed in a particular valuation band divided by the number which in that proportion is applicable to dwellings listed in valuation band D, calculated by the Council in accordance with Section 36(1) of the Act, as the amounts to be taken into account for the year in respect of categories of dwellings listed in different valuation bands

- (v) That it be noted that for the year 2024/25 the Mayoral Police and Crime Commissioner Precept and the Mayoral General Precept (including Fire Services) have stated the following amounts in precepts issued to the Council, in accordance with Section 40 of the Local Government Finance Act 1992, for each of the categories of dwellings shown below:-

Precepting Authority

Valuation Bands	Mayoral General Precept (including Fire Services)	Mayoral Police and Crime Commissioner Precept
A	£75.29	£170.87
B	£87.85	£199.34
C	£100.40	£227.81
D	£112.95	£256.30
E	£138.04	£313.25
F	£163.14	£370.21
G	£188.24	£427.17
H	£225.90	£512.60

- (vi) That, having calculated the aggregate in each case of the amounts at (iv), (f), (i), and (v), the Council, in accordance with Section 30(2) of the Local Government Finance Act 1992, hereby sets the following

amounts as the amounts of Council Tax for the year 2024/25 for each of the categories of dwellings shown below:-

(i) Part of the Council's Area

Valuation bands	Parish of Blackrod	Parish of Horwich	Parish of Westhoughton	All other parts of the Council's area
A	£1,454.47	£1,451.39	£1,438.96	£1,427.38
B	£1,696.91	£1,693.33	£1,678.82	£1,665.31
C	£1,939.29	£1,935.19	£1,918.61	£1,903.17
D	£2,181.73	£2,177.12	£2,158.47	£2,141.10
E	£2,666.53	£2,660.89	£2,638.10	£2,616.87
F	£3,151.39	£3,144.73	£3,117.79	£3,092.70
G	£3,636.20	£3,628.51	£3,597.43	£3,568.48
H	£4,363.46	£4,354.24	£4,316.94	£4,282.20

(vii) That the Council's basic amount of Council Tax for 2024/25 at an increase of 4.99% is not excessive in accordance with principles approved under Section 52ZB Local Government Finance Act 1992.

(viii) That the Borough Treasurer be delegated authority to collect revenues and disburse monies from the relevant accounts.

(ix) That it be noted that the Government have set a National Non-Domestic Rate of 49.9p in the pound for small businesses and 51.2p in the pound for larger businesses for the financial year 2024/25.

(x) That the Council's current policy in respect of discretionary relief for charitable organisations, as approved by the Cabinet on the 5<sup>th</sup> February 2024, be reaffirmed and that the Borough Treasurer be delegated authority to determine applications for such relief.

(xi) That War Disablement Pensions and War Widows' Pensions be disregarded for the purposes of the Council Tax Support Scheme.

(xii) That Council approves the following definition for the 'minimum occupancy period' for Council Tax Discount Class C properties, to apply from 1<sup>st</sup> April 2024:

"For the purposes of Discount Class C, in considering whether a dwelling has been vacant for any period, any one period, not exceeding six weeks, during which it was not vacant shall be disregarded".

(xiii) That the minutes of the proceedings of the undermentioned Scrutiny Committee regarding their consideration on the budget be noted:-

Corporate and External Issues Scrutiny Committee 8<sup>th</sup> February 2024



# **APPENDIX I**

## **Equality Impact Assessment**

## **1 Background and Context**

1.1 This document provides a strategic EIA of the service reductions and changes that the council is proposing in order to achieve a balanced budget for 2024 to 2025. It is a strategic analysis only at this stage, as the detail of each option is yet to be developed. Individual EIAs will be produced for each of the final options, when developed, as part of an ongoing consultation exercise.

## **2 Budget Strategy**

2.1 Over the last decade the council has successfully delivered a succession of budget reductions totalling around £221m. It is proposed that the council adopts a one-year budget strategy again this year, albeit that a significant proportion of the cuts will be cash-flowed by reserves once more into 2025/26.

2.2 The **amended cuts target of £8.644m for 2024/5** is based on the following assumptions and considerations:

- An increase in council tax of 4.99% (including 2% ringfenced to Adult Social Care).

2.3 It is important to stress that in identifying options to achieve these cuts, the council needs to strike a balance between the impact on the general public of any council tax increase, and the impact on the public in terms of service reductions. A decision to reduce the council tax increase for 2024/5 will require a higher level of cuts to the budget. Every 1% of council tax not raised equates to around £1.3m of cuts.

## **3 The Approach to Managing and Mitigating Service Impact**

3.1 As seen in previous years, the scale of the cuts needed within the context of the past 12 years of reductions, and the restrictions on where, within the council's budgets, these can be taken, mean that there are now very few options available across our services which enable the council to deliver a legal budget for 2024/5.

3.2 The council faces an extremely challenging and limited set of options to choose from, in order to manage and mitigate, as far as possible, the worst of the impacts arising. To do this the council will:

- Continue to maintain its strategy to ensure that the statutory provision continues to be met, whilst supporting Bolton's local economy;
- Ensure that the council is financially stable, managing effectively with the resources it has;
- Work alongside Bolton's residents to support and enable them to deliver in their communities.

## **4 Strategic Approach**

4.1 Within the context of the council's strategic priorities, a number of principles underpin the proposals. These are:

- Working together – we will work as one team across the council and with partners to achieve our goals; we will embrace new ways of working across organisations and sectors.
- Our methods of working and infrastructure will be fit for the future, meeting residents' expectations;
- *Empowering Communities Change Programme*  
We'll ensure that our residents have greater control in the planning, design and delivery of health, social care and public services; we'll improve how we identify and understand our community assets and how these can be used to improve quality of life; we'll ensure that our

workforce better reflects the communities we serve; we'll do more to align and support locally focused approaches, such as Community Alliances.

- *Strategic Intelligence/ Performance and Delivery Change Programme:*  
We'll make best use of the available data and information to support insights and inform decisions; we will understand how intelligence can play a core role in designing, delivering and transforming public services; and, ensure that we use it to deliver our outcomes for the residents of Bolton and improve efficiencies/value; we'll make decisions based on what data is showing us will improve the performance of the organisation.
- *Digital Transformation Change Programme*  
We'll embed a digital first culture within the organisation and develop council processes to deliver better outcomes, and help with quality, ease and efficiencies of service. We'll make better use of the resources at our disposal to meet the needs of residents, businesses and staff;
- *Start for Life Change Programme*  
We'll develop a Start for Life offer across all relevant agencies; we'll further develop our inclusive education approach to ensure all children feel they belong in their local school or setting and are prepared for life and independence; we'll ensure support for children and young people is seamless throughout their journey; we'll create a network of Family Hubs.
- *Economic Growth and Resilience Programme*  
We'll increase investment into the town, maximising the strengths of Bolton; create jobs and support residents into sustainable employment and healthy resilience; we'll match skills and training to employer future demand, including green jobs; we'll support scale-ups and business growth and innovation.

## **5 Specific Proposals**

- 5.1 There are a number of specific options with a potential equality impact, including a small number which impact on the size of the council's workforce (overall, it is estimated that a reduction of 5.28 Full Time Equivalents [FTE] will be required) across reviews of universal and targeted services. Full details are included in **Appendix C**.
- 5.2 Whilst all options will be considered from an equality impact perspective as detailed proposals come forward, some of the options in **Appendix C** carry a greater likelihood of potential impact. The following options have the potential to specifically impact on people who fall within the groups with protected characteristics identified within the Equality Impact Assessment process:
- Review of staffing/vacancies in Children's, Public Health and Corporate Resources;
  - Implementation of the demand strategy for Adult Social Care and Housing need services;
  - Review of non-statutory subsidy on transport;
  - Review of Early Help Model;
  - Contract Efficiencies and Inflation;
  - Changes to recycling;
  - Street Lighting;
  - Review of Libraries
  - Review of Welfare provision.
  - Charging opportunities
  - Disposal of assets

## **6 Consultation**

6.1 Formal consultation on the budget options set out in the report has taken place and included:

- Consultation with trade unions – the report was shared with unions and they had an in-person briefing. No formal response was received from any of the unions.
- Views and comments were sought from all stakeholders via an online consultation questionnaire. A paper copy was available upon request, and support to engage in the consultation was made available, where stakeholders required it. In addition, paper copies of the consultation were publicly available in Bolton libraries. A captioned video recording was also provided on the council's website, explaining the budget proposals and how people could have their say;
- Targeted communications/discussions with representatives of the community and voluntary sector and business rates payers took place;
- Briefings with staff, primarily via an online, recorded presentation, updates via email explaining the overall budget position, provision of Frequently asked Questions and a questions log, and access to the report online. Managers were asked to ensure that staff without access to a device or away from the office (maternity, paternity, adoption leave, off sick, on sabbatical or secondment) were briefed.

6.2 Specific proposals, which will be brought forward following the approval of the budget in February 2024, will be subject to individual EIAs, consultation and assessment procedures at the appropriate time if required.

**7a Summary of the aims, objectives and purpose of the proposals, including desired outcome**

7.1 The report sets out the strategic context and outline budget for 2024/5, including options to achieve the anticipated reduction of £8.644m over the one-year budget cycle.

**7b Who are the main stakeholders in relation to the proposal?**

7.2 As set out in previous strategic EIAs, the very nature of the services the council provides, and the scale of the cuts required, mean that a range of stakeholders are likely to be affected by the reduction in, and changes to, council service provision in some way over the next year. In particular:

- Service users/their carers – both now and in the future, may find that some aspects of service provision change. Some services may change fundamentally, and be delivered in very different ways; some services may reduce or stop; and some customers' eligibility to access services may change;
- Members of the general public – could be affected by further cuts to universal services and increases to council tax;
- Organisations working with, or supported by, the council – the reducing level of resources available will continue to have an effect on the extent to which the council can provide financial support for the work of partner organisations. Equally, whilst difficult to quantify, the reduction in services provided by the council may also have an effect on the demands for the services provided by these partners;
- Staff – given the ongoing requirements to reduce budgets, there will continue to be an impact on staff, whether through loss of employment or associated restructuring and change. The council's workforce headcount has already reduced by around 1900 employees since 2009, and a minimum of 5.28 FTEs may be impacted by this programme. However, the council retains the objective of seeking to manage all reductions consensually as far as possible, to mitigate the

impact on staff, through the use of voluntary early retirement and voluntary redundancy, in line with statutory requirements, as well as vacancy management.

- The proposals for income generation could lead to inward investment and job creation in the borough, and the impact on the supply chains would increase and benefit the local economy.

## **7c In summary, what are the anticipated (positive or negative) impacts of the proposals?**

- 7.3 The philosophy set out by the council to deliver its budget is very clear regarding its priorities to ensure that the council is financially stable and to enable economic growth. The approach set out in the earlier parts of this EIA seeks to deliver the best outcome for Bolton in a very difficult set of circumstances and, where possible, mitigate the worst of the impacts.
- 7.4 Proposals have again been sought from each of the council's directorates to offer a degree of protection to front line services, whilst at the same time moving forward on our economic strategy. However, the sustained cuts faced over the last twelve years mean that it is inevitable that even frontline services will see an impact.
- 7.5 The potentially negative impacts are: reduction or cessation of universal and non-statutory services; elevated thresholds and reduced levels of statutory service provision; an increase in council tax; increased fees and charges for council services; a potential further reduction of around 5.28 FTEs. We will continue to mitigate this through: ongoing investment in economic growth and development; a workforce strategy to mitigate the impact of reductions in staff as far as possible, and; maximising efficiency by making use of technology where possible. Where this is the case, further engagement and insight will be obtained to understand the full equality implications for protected groups accessing these services.
- 7.6 The potentially positive impacts are: increased income from commercial activities, which will reduce the level of cuts required overall; and increased availability of housing through a financial incentive to return empty/second homes to occupied use, thus generating additional council tax revenue and helping to tackle the housing shortage.

### Council Tax

- 7.7 There were no changes to council tax limits in the Chancellor's Autumn Statement on 22 November 2023, and so the referendum limit remains at 2.99% for the general levy, plus a further 2% levied for Adult Social Care.
- 7.8 The council acknowledges that any increase in council tax has a financial effect on those who are eligible to pay in the borough. This may be particularly difficult for those who are already under financial pressure, especially in light of cost of living challenges. However, the proposed increases will subsequently reduce the level of cuts which may otherwise be needed to deliver a balanced budget.
- 7.9 In addition, the council continues to provide a discretionary council tax discount scheme for eligible residents requiring extra help, as well as a free and confidential Welfare Rights service and Money Skills service.
- 7.10 The council also works with key partner organisations in Bolton via a Cost of Living Strategic Partnership, in order to provide a joined up response for residents experiencing financial hardship, including the Citizens' Advice Bureau, Bolton Community and Voluntary Service, Bolton CVS, Bolton at Home and other registered housing providers, Guild of Help, Urban Outreach, the Trussell

Trust, and all relevant council services (Education, Public Health, Customer Services, Housing etc). The dedicated Cost of Living website has links to sources of help and support across a wide range of areas, including energy, food, debt advice, access to grants, employment, mental health and wellbeing. The council currently receives Household Support Fund until March 2024, and a further allocation of this funding from central government which has enabled the council to provide support to our most vulnerable households.

- 7.11 The 2% increase specifically for Adult Social Care would help to protect the most vulnerable customers and residents in the borough and reduce the cuts in services they receive.

**7d Is there any potential for (positive or negative) differential impact or adverse impact with regards to the identified stakeholders and the diversity groups. Can this be justified/what mitigating actions will be taken?**

**8 Council Stakeholders**

Service Users (including parents and carers)

- 8.1 The council continues in its commitment to protect children's social care services as far as possible, however, reviews are proposed in services for children and young people. The council retains the priority of limiting the impact on the most vulnerable children and young people, and care has been taken to ensure that the potential impacts of the proposals are mitigated as far as possible through targeting and engaging partners to deliver diminished council services. Any service led changes in Children's Services will be subject to further EIAs.
- 8.2 The council is also committed to protecting adult and older people's social care services as far as possible, and in addition to this budget strategy. There is potential for adults to be impacted by the Adults Demand Strategy, however any impacts will be explored via specific EIAs, as will any service led changes.

Members of the general public

- 8.3 The council has a clear strategy of maintaining financial stability and delivery of statutory services, whilst at the same time moving forward with our economic strategy. The strategy continues to be pursued through these proposals.
- 8.4 If council tax rises are approved, there would be a further, specific financial impact on those who pay council tax in Bolton, as they would be asked to pay an increased level of council tax. By raising council tax, however, the council can increase its income and therefore reduce the level of cuts which may otherwise need to be made. This is particularly so for the 2% Adult Social Care precept.
- 8.5 In coming to a decision about possible council tax increases, the council will seek to strike a balance between the impact on the general public of a council tax increase, and the impact on the public in terms of service reductions.
- 8.5.1 Consultation feedback indicated significant concerns about the impact of increasing council tax, or to the extent proposed, on those who are already struggling financially. Further detail is provided below. However, due to the removal of the Household Support Fund grant by central Government, the proposals now exclude the removal of the Local Welfare Scheme funds, which means that those residents experiencing the greatest economic disadvantage will still be able to access support where eligible. A strategy is in development, in partnership with a range of stakeholders, to agree priorities and support from 2024/5. This draws on

existing services, providing support across a range of themes, including housing, money advice, employment and health. See also socio-economic impact below.

#### Organisations working with or supported by the council

- 8.6 As previously, the council must look at making reductions from across the range of services which it provides, including commissioned and grant funded services. This means that partners who receive funding from the council may see a change or reduction in their funding, which may, in turn, have an impact on their service delivery.
- 8.7 Clearly, it will be essential to ensure that the council continues its good working relationships with partners from across the private, voluntary, and charitable sectors to understand, and where possible, mitigate the impact of possible funding changes. In addition, it will be necessary for individual reviews to consider any potential impact on partner service delivery, e.g. where complementary services are being reviewed. The council has carried out significant work with these partners over the last few years to encourage and assist them to become self-financing and sustainable where possible. In addition, care will be taken to consider the cumulative impact that this may have on service users.

#### Staff

- 8.8 Given the ongoing scale of the budget cuts, there will continue to be an impact on staff, whether through loss of employment, removal of vacant posts, or associated restructuring and change. The reduction in the council's workforce has been made year on year almost entirely through voluntary means, for example, by deleting vacancies, offering voluntary early retirement/redundancy, and a comprehensive redeployment scheme. The proposals set out in the report have been developed, alongside a continuing commitment to a set of values as an employer, which seek to protect the council's workforce from the worst aspects of the budget reductions and remain a best practice employer. As previously, the proposal will consider reductions as far as possible via consensual means.
- 8.8.1 In response to feedback received during consultation on staff impacts, the council recognises that savings review processes are challenging for staff. The council continues to promote and enhance its workforce wellbeing offer, providing staff with access to a range of support including an Employee Assistance Programme and Occupational Health advice. Workloads are monitored by managers via team meetings, 121s and supervision, and regular staff engagement is conducted to gain feedback on support requirements and to develop new initiatives. We work with the joint trades unions to resolve any issues raised, improve our policy framework and support for staff, and contribute to national discussions on pay and conditions. Pay is subject to a Living Wage Foundation supplement and all roles are subject to a job evaluation scheme. Use of agency staff is regularly reviewed to enable implementation of more permanent arrangements.

#### Diversity Groups

- 8.9 Throughout the process, the council will need to consider the impact of its proposals on its duties under national equalities legislation, which require it to have due regard to the outcomes to protected groups, whilst also ensuring that the council can set a legal, balanced budget.

- 8.10 Headline analysis identifies potential impacts around age, disability, caring status, gender, and socio-economic deprivation. Specific impacts around race, religion, gender assignment, sexuality, pregnancy and maternity, armed forces, care leavers, and marriage and civil partnership have not been identified at this early stage but will be analysed as part of detailed future EIAs for individual reviews.
- 8.11 Further detail included in previous strategic reports indicates that equality issues must be examined around customer access, as the council continues to move towards a greater use of technology as the primary access route. This is supported by the council's Digital Strategy and Digital Inclusion Strategy for our communities, through:
- a cross-council group of staff which considers equalities and access on a regular basis,
  - a boroughwide Digital Inclusion Partnership which includes partner organisations from across the public, private and voluntary and community sectors,
  - links into the Greater Manchester Digital Strategy and Blueprint, which includes priorities around digital inclusion. This includes membership of a Greater Manchester Digital Inclusion network, at which Bolton is represented; and
  - the provision of information, support, kit and data in a range of settings, such as libraries and community centres.

#### Children and Young People and their Parents/Carers

- 8.12 There are a number of budget options proposed for services for children and young people, with two options in particular with a potential to impact disabled children and young people and/or those with additional educational needs and their parents/carers, and/or those experiencing socio-economic deprivation. Multiple research papers/sources demonstrate a strong link between disability and increased costs, for example for medical expenses, equipment, special diets, and therapies<sup>1</sup>. Care will be taken to ensure that the potential impacts of proposals are well understood and mitigated as far as possible, e.g. through targeting.
- 8.12.1 Feedback from the consultation indicated that stakeholders were indeed concerned about the impact on children and young people and their parents/carers of the transport option, particularly where families have more than one disabled member and/or where families are already struggling financially, with working parents appearing to be disproportionately

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<sup>1</sup> Joseph Rowntree Foundation – Special Educational Needs and their links to poverty, 2016  
[2016 menzies et al report 3184 final.pdf](#)  
[Cost of living: Impact of rising costs on disabled people - House of Lords Library \(parliament.uk\)](#)  
<https://disabledchildrenspartnership.org.uk/wp-content/uploads/2021/10/Then-There-Was-Silence-Full-Policy-Report-10-September-2021.pdf>



affected. Feedback also suggested that nursery and school attendance could be affected, creating further gaps between disabled children and young people and their peers.

- 8.12.2 Consultation feedback also flagged concerns around cuts to SEND services, connected to the Early Help review, which are already stretched and under-resourced, with detrimental impacts on disabled children and young people.
- 8.12.3 The council recognises the very challenging situation in terms of access to both universal and targeted services for children and young people, particularly those with SEND and/or who are disabled. Should the proposed options be approved, the council will take the feedback from stakeholders on board during the redesign process, as well as engaging in co-design wherever possible, to ensure that stakeholder voices are represented. Full consultation will then be undertaken on the detailed options before any final proposals are brought forward.
- 8.12.4 The proposals to dim and trim streetlighting prompted concerns around the safety of children and young people, particularly when travelling to and from school in the dark. Lighting levels will continue to meet industry-standard safe levels, even at the dimmed settings, and the service has mapped areas of higher crime levels and footfall, to preserve current lighting levels according to need. This will be monitored by the service after implementation, should the proposals be approved.
- 8.12.5 Concerns were also raised around the potential impact of a review of the Library service, which has the potential to impact on children and young people disproportionately. When developing the option, should it be approved, care will be taken to understand these concerns fully by engaging with children and young people and their parents/carers as part of the redesign process.

#### Older People and those who care for Older People

- 8.13 Ongoing transformation within adult social care means that the way in which services are provided will continue to change. The council continues to seek to deliver quality and affordable services, whilst also promoting independence, choice, and control, and meeting statutory duties. However, service users and their families and/or carers will see changes as a result of the budget proposals, and also as the programme of integration across health and social care services continues.
- 8.14 Throughout the process, it will be essential to ensure that any proposed changes to services are based on a full understanding of need and eligibility, to ensure that Bolton's older people and their families continue to receive appropriate, accessible, and safe care services.
- 8.15 In addition, there is potential for older people and those who care for them to be impacted upon by changes to other services arising from the proposed budget cuts, for example changes to welfare provision or frontline services. As these individual options are brought forward, care will be taken to consider the potential impact on older people and their carers.
- 8.15.1 Concerns were expressed during consultation that older, vulnerable adults would be hit the hardest as a result of the proposed cuts to Adult Services and Housing. All social care services are statutorily assessed and where a need is identified it will be met. The proposals consider alternative ways of meeting identified needs in the most effective way, they also consider how services could be delivered more effectively, in line with the vision for Adult social care to enable people to Live Well at home. Wherever possible and appropriate, service users and their carers will be engaged in co-design when these options are

developed, to ensure that their views are represented and reflected, and consultation will be carried out on the detailed proposals.

- 8.15.2 During consultation, feedback also indicated worries around the proposed changes to charging for council tax on empty homes, particularly where a resident or their family/carers might be trying to sell an empty property in a challenging market, where they had moved into a care home. The council already has a policy whereby properties left empty by someone who is a permanent resident in a care home are exempt from the charge. There is also a discretionary fund available, which means a reduction can be granted on the charge for unoccupied properties in some instances. Each case is determined on its own merits, including the circumstances surrounding the empty property, whether there is any equity in the property and the financial circumstances of the owners. The policy is available here: [council-tax-discretionary-reduction-policy \(bolton.gov.uk\)](http://bolton.gov.uk/council-tax-discretionary-reduction-policy)
- 8.15.3 Consultation also indicated concerns about the proposed review of library services and the potential impact on older, vulnerable adults, as well as potential reductions to the council's assets and therefore accessibility of services. The council is committed to engaging with residents and other stakeholders when bringing forward the detailed proposals, should these options be approved, and consultation will be carried out where appropriate to allow any further concerns to be raised and taken on board.
- 8.15.3 Consultation indicated that some older people are/may have to support younger family members that are experiencing financial hardship. This could result in older people being pushed into negative socio-economic status. Intelligence will be fed back to the Anti-Poverty Partnership to explore within the strategy development.

## 8.16 Gender

When bringing forward the individual options, should they be approved, service managers will be mindful of the potential for proposed changes to impact on gender, specifically women, and in particular the Highways Street Lighting option.

- 8.16.1 The proposals to dim and trim street lighting resulted in concerns being raised during consultation around safety, particularly for women (and others). The service has mapped areas of higher crime and footfall and lighting levels will be maintained at the current level where this has been identified as an issue. The service will review the impact of the lighting changes on an ongoing basis, whilst maintaining reduced but still safe levels of lighting elsewhere.
- 8.16.2 A number of proposals also have the potential to impact disproportionately on women, specifically due to the significantly higher proportion of women who are carers, both paid and unpaid, and the higher proportion of council staff who are female. The council has policies in place to ensure that female staff are treated equally. Where proposals have the potential to impact disproportionately on carers, both paid and unpaid, care will be taken to understand and mitigate these potential issues as options are brought forward.

## Socio-Economic Deprivation

- 8.17 The proposals in the budget report have the potential to have an impact on people who are experiencing socio-economic deprivation, and this will need to be considered within the detailed EIA

for each review. In particular, consideration will need to be given when individual proposals come forward for income generation opportunities, as well as reductions or other changes to services. The council is in the process of developing its Anti-Poverty Strategy, working with a range of partner organisations in Bolton, to ensure that remaining resources are joined up and streamlined to avoid duplication, and to make it easier for residents to find support when needed. The council continues to provide a variety of services to support those experiencing economic deprivation, such as the free and confidential Money Skills Service, the Welfare Rights Service, and Housing options and Advice, as well as deploying the Household Support Fund.

- 8.17.1 The council is also working in partnership with the Greater Manchester Poverty Action Group (GMPA) which has facilitated workshops and led on an extensive engagement piece with stakeholders, including residents. There has been an emphasis on understanding the lived experience of residents experiencing financial pressures which will inform the strategy. The work with GMPA includes the development of a Money Advice Referral Tool (MART) that will be available to partners at no cost.
- 8.17.2 However, a significant number of concerns were raised during consultation around the proposals to raise council tax, either at all or to the proposed level, given the levels of financial hardship already being experienced in the borough, alongside reductions in service provision and eligibility criteria that exclude some residents from accessing financial support.
- 8.17.3 Concerns were raised about the proposed cuts contributing to worsening mental health outcomes for residents, a rise in social inequality, and increased numbers of people needing to access emergency support and funding.
- 8.17.4 The council recognises the challenges expressed and will continue to work with partners to identify a strategy and options to support those who are struggling financially.
- 8.17.5 The proposals to dim and trim street lighting prompted concerns about crime and safety, which is one of the indicators used to measure multiple deprivation, i.e. areas of multiple deprivation tend to see higher levels of crime. If this proposal is approved, lighting levels in areas identified as experiencing higher levels of crime will be maintained at the current level, and the service will continue to monitor this and respond accordingly. Further details of the service response were provided during consultation here:  
<https://www.bolton.gov.uk/downloads/file/5674/frequently-asked-questions-proposed-changes-on-street-lighting>
- 8.17.6 The proposed review of Library services led to concerns being raised during consultation about the possible impact on those residents who experience socio-economic disadvantage, and the importance of such services to them in the absence of an ability to access alternatives. Should this option be approved, the detailed proposals will be developed with this in mind and further engagement with stakeholders will be undertaken to enable concerns to be considered.
- 8.17.7 Specific concerns were raised regarding the option on Home to School transport, with respondents stating that any charging in future could tip them from work into unemployment, or affect the children's or young people's future work or education prospects, thus continuing the cycle of poverty. Care will be taken when developing this option, should it be approved, to listen to people's concerns and issues and mitigate any adverse impacts. A co-design approach will be taken.

8.17.8 Some concerns were raised around residents in our most deprived communities being disproportionately impacted by changes to paper and card recycling, due to an inability to access transport to community recycling facilities and smaller properties. There was also considerable concern around increases to fly tipping and littering, which are particular issues in our areas of multiple deprivation. The council has a robust enforcement policy in place to deal with these issues and will continue to monitor flytipping and littering levels, particularly in our deprived areas.

8.17.9 People responding to the consultation also raised concerns about the proposed changes to charging on empty properties, particularly where a resident may have had to go into a care home, or where the property had been inherited, and where it was providing difficult to sell the property on, and the impact on family members who may not have the means to pay additional charges. The council already has a policy whereby properties left empty by someone who is a permanent resident in a care home are exempt from the charge. There is also a discretionary fund available, which means a reduction can be granted on the charge for unoccupied properties in some instances. Each case is determined on its own merits, including the circumstances surrounding the empty property, whether there is any equity in the property and the financial circumstances of the owners. The policy is available here: [council-tax-discretionary-reduction-policy \(bolton.gov.uk\)](https://www.bolton.gov.uk/council-tax-discretionary-reduction-policy)

## 8.18 Disability

Some of the proposals set out in **Appendix C** have the potential to affect disabled people disproportionately and care will be taken, as the individual options are brought forward, to engage and consult with them to fully understand this and mitigate it. In particular, disabled people and their carers are more likely to experience socio-economic disadvantage due to challenges around employment, accessibility of services, and additional costs, such as utilities costs. [See footnote 1.]

8.18.1 Feedback from the consultation indicated that there was potential for disabled people to experience disproportionate impacts arising from these proposals, specifically on the following options: SEN Transport, Early Help, Paper/Card recycling, street lighting, Adult Social Care and Housing, disposal of assets and the general impact of cuts to services and increases to council tax.

8.18.2 The very nature of the SEN Transport option means that it will directly impact on disabled children and young people and their families, including those where there may be more than one disabled family member. Similarly proposed changes to the Early Help service have the potential to have a greater impact on families with disabled members. This includes any impacts on parents/carers to continue in employment as a result of any proposed changes and resulting increased poverty. Any service redesign will employ a co-design approach with families wherever possible to mitigate any impacts that are identified.

8.18.3 In terms of Paper/Card recycling proposals, should these be approved, the council recognises that a single solution is not appropriate, with different service users having different needs. The service will work with households to establish whether additional capacity is required, in the case of paper or card medicine packaging, for example. Waste audits are also available on request and where appropriate there may be the option to provide an additional bin or bag. Assisted collections continue to be available for eligible residents.

- 8.18.4 Concerns were raised in terms of the street lighting proposed changes and impacts on disabled residents and visitors. The service will regularly review those areas where street lighting is dimmed under these proposals to ensure that any issues are addressed.
- 8.18.5 Feedback was received in general about proposals to review adult social care and housing, and given the fact that many older people and adults receiving care are also disabled, this will form a key factor in service co-design and redesign. Further engagement will be undertaken as appropriate on the detailed options to ensure that any adverse impacts are mitigated.
- 8.18.6 Some concerns were raised during consultation around the disposal of council assets and the impact on people's ability to access services as a result. The council's asset disposal strategy takes a planned approach to asset disposal, ensuring that considerations around access to services is factored into any decision making, and any equality impacts will be reviewed as each site is considered for disposal.
- 8.18.7 As previously indicated, feedback from the consultation confirmed concerns around the potential for a disproportionate impact on disabled people of cutting services in general and raising council tax, given the economic hardship already affecting disabled people due to higher costs and barriers to education and employment. This will continue to be monitored and the council will continue to look at options for mitigating the potential impacts.

**8e** **Are there any gaps in your evidence, or conclusions which make it difficult to quantify the potential adverse impact? If so, please explain how you will explore the proposal in greater depth.**

- 8.19 Yes, this strategic EIA provides a high-level response to the council's standard EIA questions. It will, however, be necessary to bring forward detailed proposals for each of the options, including detailed analysis of equality impact, and this will take place on a phased basis over the next twelve months. It will also be necessary to consult with trades unions and appropriate stakeholders on each of the individual reviews as they come forward. The consultation processes will help to inform a full assessment of equality impact.
- 8.20 In conclusion, the council continues to make every effort to provide quality services, support economic development, and to respond appropriately to its duties under the Equality Act. However, this strategic EIA recognises the significant challenge presented by Bolton's financial position, and the likelihood that many of the strategic budget options, whilst seeking to deliver the "least worst" outcome for Bolton, may well have an impact on a range of stakeholders as the council sets a legal budget for the coming year.

**Initial Screening for relevance: Details of Impact (Part 1)**

<b>Directorate:</b>	Corporate		
<b>Section:</b>	Corporate Finance		
<b>Person completing this form:</b>	Nicky Connell	<b>Date:</b>	23 November 2024

<b>Title of report or proposal:</b>		<b>Report No</b>	
Budget Report 2024/5		33716	
<b>Brief details of proposal, including the aims, objectives and purpose (all strategies, policies, reviews, projects, existing proposals, etc will be referred to as 'proposal'):</b>			
The report sets out details of the proposed budget for 2024/5 for consultation, taking into account the financial context and challenges for the local authority.			
<b>'Proposal' status (please tick)</b>	Proposed / New	<input checked="" type="checkbox"/>	<b>Existing (i.e.: routine recommission)</b> (If an EIA has previously been completed please include the date) Click or tap to enter a date.
<b>Bolton Council Led</b>	<input checked="" type="checkbox"/>	<b>Partner Led</b> (Please attach partner EIA, and complete section 3 - EIA sign off sheet, as screening not needed)	Click or tap here to enter text.

Public sector bodies need to be able to evidence that they have given due regard to the impact and potential impact on all people with 'protected characteristics' in shaping policy, in delivering services, and in relation to their workforce.

Under the Equality Act 2010, the council has a general duty to have due regard to the need to:

1. **eliminate unlawful discrimination, harassment**, victimisation and any other conduct prohibited by the Act;
2. **advance equality of opportunity** between people who share a protected characteristic and people who do not share it; and
3. **foster good relations** between people who share a protected characteristic and people who do not share it.

By completing the following questions the three parts of the equality duty will be consciously considered as part of the decision-making process.

Details of the outcome of the Equality Impact Assessment must also be included in the main body of the report.

Initial Screening for relevance: Details of Impact (Part 1)

Which stakeholder groups will potentially be impacted?									
Residents	<input checked="" type="checkbox"/>	Partners	<input checked="" type="checkbox"/>	Workforce	<input checked="" type="checkbox"/>	Service users	<input checked="" type="checkbox"/>	Businesses	<input checked="" type="checkbox"/>
CVS Sector	<input checked="" type="checkbox"/>	Members	<input checked="" type="checkbox"/>	Other (please state)	Click or tap here to enter text.				

Anticipated Negative Impacts														
Protected Characteristics / Groups	N/A	Age	Armed Forces	Care Leavers	Caring Status	Disability	Gender Reassignment	Marriage / Civil Partnership	Pregnancy & maternity	Race	Religion / Belief	Sex	Sexual Orientation	Socio-economic
1) Will the 'proposal' potentially present any challenges / barriers to any protected groups?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2) Will any group be potentially excluded as a result of implementing your 'proposal'?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3) Does the 'proposal' have the potential to worsen existing discrimination or inequality?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4) Will the 'proposal' have a potential negative impact on community / partnership relations?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**Anticipated Positive Impacts**

Protected Characteristics / Groups	N/A	Age	Armed Forces	Care Leavers	Caring Status	Disability	Gender Reassignment	Marriage / Civil Partnership	Pregnancy & maternity	Race	Religion / Belief	Sex	Sexual Orientation	Socio-economic
5) The 'proposal' could potentially <b>reduce known inequalities</b> , promoting equality of outcome or opportunity.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6) The 'proposal' has the potential to support <b>inclusion and engagement</b> from protected groups.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7) The 'proposal' has the potential to foster <b>good relations</b> between people.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8) The proposal could reduce the potential for <b>harassment or discrimination</b> .	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Consultation / engagement / research findings	<p><b>Since the consultation has been undertaken, further engagement has taken place with senior officers to ascertain the mitigations to impacts within their service areas. Where further consultation and engagement is needed, if proposals are taken forward, feedback from this engagement will inform future EIAs.</b></p> <p>Formal consultation on the budget options set out in the report has taken place, and included:</p> <ul style="list-style-type: none"> <li>• consultation with trade unions – information and proposals set out in this report have already been presented to the joint unions on the 24/27 November 2023.</li> <li>• Views and comments sought from all stakeholders via an online consultation questionnaire. A paper copy was available upon request, and support to engage in the consultation was made available, should stakeholders have required it. In addition, paper copies of the consultation were publicly available in libraries.</li> <li>• Targeted communications/discussions with representatives of the community and voluntary sector and business rates payers.</li> <li>• Briefings with staff, which mostly took place online, and updates via email explaining the overall budget position, plus access to the report online. Managers were asked to ensure that staff without access to a device or away from the office (maternity, paternity, adoption leave, off sick, on sabbatical or secondment) were briefed.</li> </ul>
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	Specific proposals, which will be brought forward following the approval of the budget in February 2024, will be subject to individual EIAs, consultation and assessment procedures at the appropriate time, if required.
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<b>Brief bullet point summary of positive / negative impacts:</b>	
Due to the nature of the proposals a full EIA is required, which outlines the impacts to protected groups – please refer directly to Part 2 of this EIA.	
<b>Details of any cumulative impact</b>	It has been identified that there could be cumulative impacts to community groups, should the proposal to rationalise assets be implemented. This could result in community groups being unable to afford rents and therefore could look to move their provision to alternative premises in different parts of the borough or cease delivering. This could result in disproportionate impact on communities and protected groups across the borough.

Decision:

\* All reports to the Executive Member which propose a new policy / procedure or are a cuts review should continue to undertake a full EIA (part 2).

<b>No major adverse impact identified, therefore a full EIA is not required (complete sign off sheet in section 3 and send to your Departmental Equalities Lead)</b>	<input type="checkbox"/>
<b>Impacts identified in screening process, therefore a full EIA is required.</b>	<input checked="" type="checkbox"/>
<b>This is a new policy, business improvement review or cuts review, therefore a full EIA is required.</b>	<input checked="" type="checkbox"/>

# Equality Impact Assessment

## EIA Sign Off

This EIA form and report has been checked and countersigned by the Directorate Equalities Officer before proceeding to Executive Cabinet Member(s)

Screening tool completed (please tick)	<input checked="" type="checkbox"/>	Full EIA completed (please tick)	Yes	N/A
			<input checked="" type="checkbox"/>	<input type="checkbox"/>
EIA review date (if applicable).	14 February 2024			

### Please confirm the outcome of this EIA:

Positive impact for one or more groups justified on the grounds of promoting equality - proceed	<input type="checkbox"/>
No major impact identified, therefore no major changes required – proceed	<input type="checkbox"/>
Adjustments to remove barriers / promote equality (mitigate impact) have been identified – proceed	<input type="checkbox"/>
Continue despite having identified potential for adverse impact/missed opportunities for promoting equality – this requires a strong justification	<input checked="" type="checkbox"/>
The EIA identifies actual or potential discrimination - stop and rethink	<input type="checkbox"/>

<b>Report Officer</b>	
Name:	Tony Glennon
Date:	23 November 2023
<b>Directorate Equalities Lead Officer</b>	
Name:	Rebecca Albrow
Date:	23/11/2023

# Equality Impact Assessment

## Full EIA (Part 2)

**Directorate:** Corporate

**Section:** Corporate Finance.

**Person completing full EIA:** Nicky Connell

**Date:** 24 January 2024

**Stakeholders involved in the development of the 'proposal' and how they are involved: (please list)**

Residents, Businesses, Staff, Councillors, Partner Organisations, Trade Unions, community and voluntary sector organisations, people who work in the borough, people with an interest in the borough.

All have been provided with the opportunity to feedback on the strategic options via a public consultation process, and via their union representatives or other membership organisations where relevant.

### **2) Impact to protected characteristics (only list the impacts & mitigations to those characteristics identified in the screening process).**

#### **a) Age**

Summary of impact

Details of the potential impacts across the proposed options are provided in the updated Section 1 of this EIA above. In summary, the proposals have the potential to have a disproportionate impact on older and younger residents and service users across proposals for council tax, reductions in services – specifically paper/card collection, Early Help, and asset rationalisation -, increased charges, changes to eligibility criteria

Mitigations to remedy any identified adverse impact

On the Adult Services option, all social care services are statutorily assessed and where a need is identified it will be met. The proposals will consider alternative ways of meeting identified needs in the most effective way. They also consider how services could be delivered more effectively in line with the vision for Adult social care to enable people to Live well at home. Across Adults Services and Community Housing, wherever possible any changes to service delivery and models will be carried out in collaboration with service users, their families and representative organisations and will be subject to consultation as appropriate.

When taking decisions about the rationalisation of council assets, the impact on service users' access to services will be taken into full consideration to ensure that any adverse impacts are mitigated.

Care will be taken when developing the redesigned paper/card collection service to understand residents' needs and mitigate these.

For both Early Help and SEN Transport options, detailed proposals will be developed and brought forward, taking a co-design approach wherever possible, which will ensure that any impacts are fully understood and mitigations are built into proposals ahead of consultation.

The proposed Libraries review will consider the potential age-related impacts as part of the service redesign and consultation will be carried out to ensure that this is fully understood and managed.

### **b) Armed Forces**

Summary of impact	During consultation no specific issues impacting disproportionately on ex/members of the armed forces were raised.
Mitigations to remedy any identified adverse impact	As individual options are brought forward, full Equality Impact screenings will be carried out, alongside consultation and engagement, to understand and mitigate any emerging impacts.

### **c) Care Leavers**

Summary of impact	During consultation no specific issues impacting disproportionately on care leavers were raised.
Mitigations to remedy any identified adverse impact	As individual options are brought forward, full Equality Impact screenings will be carried out, alongside consultation and engagement, to understand and mitigate any emerging impacts.

### **d) Caring Status**

Summary of impact	The proposal to review SEN Transport has the potential to impact disproportionately on carers of children and young people. There is also potential for the Early Help option to do so. In Adults, the proposals to review adult social care and housing provision has the potential to impact adversely on carers.
Mitigations to remedy any identified adverse impact	Care will be taken when bringing forward these options to ensure that carers' concerns are heard and service design is undertaken collaboratively, to minimise any potential impact.

### **e) Disability**

Summary of impact	The SEN Transport, Early Help, Adults Social Care and Housing, Paper/Card recycling collection, Street Lighting and disposal of assets options all have the potential to have a disproportionate impact on disabled residents and service users should they be approved.
Mitigations to remedy any identified adverse impact	Care will be taken when bringing forward these options to consider the concerns and issues raised and, where possible, take a co-design approach to service redesign. The ongoing impact of the proposed changes, should they be implemented will also be monitored.

#### **f) Gender Reassignment**

Summary of impact	During consultation no specific issues impacting disproportionately from a gender reassignment perspective were raised.
Mitigations to remedy any identified adverse impact	As individual options are brought forward, full Equality Impact screenings will be carried out, alongside consultation and engagement, to understand and mitigate any emerging impacts.

#### **g) Marriage / Civil Partnership**

Summary of impact	During consultation no specific issues impacting disproportionately from a marriage or civil partnership perspective were raised.
Mitigations to remedy any identified adverse impact	As individual options are brought forward, full Equality Impact screenings will be carried out, alongside consultation and engagement, to understand and mitigate any emerging impacts.

#### **h) Pregnancy & Maternity**

Summary of impact	During consultation no specific issues impacting disproportionately from a pregnancy and maternity perspective were raised.
Mitigations to remedy any identified adverse impact	As individual options are brought forward, full Equality Impact screenings will be carried out, alongside consultation and engagement, to understand and mitigate any emerging impacts. With regards to its staff, the council has policies in place to ensure that employees who are pregnant or on maternity leave are not disadvantaged or impacted disproportionately.

**i) Race**

Summary of impact	During consultation no specific issues relating to a disproportionate impact on race in relation to the proposals were raised.
Mitigations to remedy any identified adverse impact	As individual options are brought forward, full Equality Impact screenings will be carried out, alongside consultation and engagement, to understand and mitigate any emerging impacts.

**j) Religion / Belief**

Summary of impact	During consultation no specific issues impacting disproportionately in relation to religion or belief emerged.
Mitigations to remedy any identified adverse impact	As individual options are brought forward, full Equality Impact screenings will be carried out, alongside consultation and engagement, to understand and mitigate any emerging impacts.

**k) Sex**

Summary of impact	A potential differential impact in terms of gender was identified in relation to the proposals around street lighting. In addition, it will be important to further understand any options that may adversely impact from a gender perspective, particularly in terms of women and the proportion of women who carry out both paid and unpaid carer roles.
Mitigations to remedy any identified adverse impact	Street lighting levels and crime in the borough will be monitored to ensure that any negative impacts from a gender perspective are minimised. When bringing forward options that may impact on carers, such as SEN Transport, Early Help, and Adult Social Care, care will be taken to understand and mitigate any emerging impacts.

**l) Sexual Orientation**

Summary of impact	During consultation no specific issues impacting disproportionately in relation to sexual orientation emerged.
Mitigations to remedy any identified adverse impact	As individual options are brought forward, full Equality Impact screenings will be carried out, alongside consultation and engagement, to understand and mitigate any emerging impacts.

**m) Socio-economic**

Summary of impact	Overall the budget proposals carry a risk of disproportionately impacting on those experiencing socio-economic deprivation, both in terms of cuts to services, and increases to council tax. Significant concerns were raised around the impact of increasing council tax either at all, or to the level proposed. Specific options which were highlighted during consultation as having the potential to have a disproportionate impact on those in this group were: Home to School Transport, Early Help, Adult Social Care and Housing, increases in fees and charges, paper/card recycling, Street Lighting dimming and trimming, the review of the Library Service, disposal of assets, charging for empty properties.
Mitigations to remedy any identified adverse impact	The council works in partnership with a range of partners to identify and develop mechanisms to support residents who are experiencing socio-economic deprivation. Where this is a factor in specific service delivery proposals, these impacts will be monitored and mitigated as far as possible.

**3) Does your proposal cause any adverse impacts to a protected group, where mitigations cannot be implemented?**

- Yes:** Please discuss this with your Directorate Equalities Leads before completing the sign off in section 3.
- No:** this process is complete (complete sign off in section 3 and discuss with your Equalities Lead when you plan to review your EIA).

# Equality Impact Assessment

## EIA Sign Off

This EIA form and report has been checked and countersigned by the Directorate Equalities Officer before proceeding to Executive Cabinet Member(s)

Screening tool completed (please tick)	<input checked="" type="checkbox"/>	Full EIA completed (please tick)	Yes	N/A
			<input checked="" type="checkbox"/>	<input type="checkbox"/>
EIA review date (if applicable).	Click or tap to enter a date.			

Please confirm the outcome of this EIA:

Positive impact for one or more groups justified on the grounds of promoting equality - proceed	<input type="checkbox"/>
No major impact identified, therefore no major changes required – proceed	<input type="checkbox"/>
Adjustments to remove barriers / promote equality (mitigate impact) have been identified – proceed	<input checked="" type="checkbox"/>
Continue despite having identified potential for adverse impact/missed opportunities for promoting equality – this requires a strong justification	<input type="checkbox"/>
The EIA identifies actual or potential discrimination - stop and rethink	<input type="checkbox"/>

<b>Report Officer</b>	
Name:	Tony Glennon
Date:	23 January 2024
<b>Directorate Equalities Lead Officer</b>	
Name:	Rebecca Albrow



Date:	25/01/2024
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## **APPENDIX J**

### **Consultation Summary 2024/25**

In December 2023, Bolton Council's Cabinet approved proposals for the 2024/25 budget for consultation with stakeholders. The proposals reflected the continuing financial challenges faced by the organisation, resulting in a £8.6 million budget gap. Between 5th December 2023 and 9th January 2024, the Council ran a public consultation, seeking to engage residents and stakeholders impacted by future funding cuts in sharing their reflections on a proposed reduction in Council budgets.

During this period 618 residents and stakeholders engaged in the consultation process, with one formal response being received from Bolton Neighbourhood Watch.

The following information outlines a summary to the consultation responses.

- **Increase in fees and charges**

58% of stakeholders agreed in principle with the proposal. However, residents raised concerns around the affordability of the offer and the proposals effect on those that are disabled, are carers and those that are economically disadvantaged.

The proposal to charge for school transport, for Early Years children and young people aged 16+ years who access SEND education, was seen to have a negative impact on families, particularly those that had more than one disabled child. Residents highlighted how disabled families have greater expenditure and reduced financial budgets and therefore the proposal seemed to be disproportionately impacting this cohort. Working parents were also seen as being disproportionately impacted, resulting in some questioning whether they could continue to work if the proposal was implemented. The responses also highlighted a concern that school and nursery attendance could decline and the continuation of post-16 education could be reduced if the proposal was introduced.

Some comments also referenced the challenges of accessing SEND services, stating that any further cuts could significantly impact an under resourced area and be detrimental to the future life outcomes of children with disabilities.

- **Changing the way we deliver services**

66% of stakeholders agreed with the principle to look at alternative ways to deliver services.

There were significant concerns with the proposal to change the paper/cardboard waste collection. Residents highlighted the different methods of collection currently in place, with some residents having to use refuse sacks and others having shared access to paper recycling bins. The proposal was seen to differentially impact families and multiple occupancy households, as well as those with limited access to transport. Residents questioned whether additional community provision would be accessible if the proposal was to be introduced.

Concerns were also raised that the proposal could result in an increase in residents using general waste, as well as a rise in fly-tipping. Some stakeholders also outlined concern around the increase production of paper and cardboard by manufacturers and delivery firms.

Alternatives to the proposal were put forward, including reviewing whether mixed recycling waste (burgundy bin) or green garden waste could be more conducive to a monthly collection (only in winter for green bins).

Dimming and trimming street lighting was also a concern for residents, who thought that women, children, shift workers and people with disabilities could be put at risk as a result of the proposal (either through victims of crime or at an increased risk of having an accident). Some stakeholders are particularly concerned with the possibility of a rise in criminal activity and anti-social behaviour.

Respondents were concerned by the limited levels of service delivery being provided by Early Help, stating a significant under-resourcing of the provision. Other respondents are concerned that Adult Social Care would be negatively affected, with cuts to the service hitting our most vulnerable residents the hardest.

Residents are concerned with the proposal to review libraries, in particular moving to a commercial or privatised delivery model. They are particularly concerned with the quality-of-service depleting, which would negatively impact younger, older and socially disadvantaged service users the most.

Some residents and stakeholders were particularly concerned by a possible reliance on central government funding for welfare support, and the impact any change could have on vulnerable and economically deprived communities, including the working poor. Whilst respondents recognised the wider political challenges local authorities were facing nationally, they called for greater lobbying to take place. Some stakeholders also outlined the cumulative impact the proposals would have on the wider community and voluntary sector.

There was overwhelming agreement to review non-statutory functions, particularly in relation to the proposal to reduce mayoral expenditure. Stakeholders called for the Council to go further with its proposal and reduce this service further and review other non-statutory functions. This could reduced the impact of cuts for statutory services.

- **Using buildings efficiently**

97% of residents agreed with the proposal to use buildings efficiently, however there is concern around the impact to local community groups and whether mitigations would be put in place to reduce any potential impact for the community and voluntary sector.

- **Staff costs and efficiencies**

78% of stakeholders agreed with the proposal to review staff costs and evaluate where efficiencies could be made. However, concerns were raised by stakeholders and employees who outlined the additional impact on the workforce, particularly on teams running on limited resources and feeling overstretched. Respondents thought there would be an adverse impact on the mental health and wellbeing of staff, having to pick up extra responsibilities as a result of the proposals. This could lead to a risk in some employees leaving the organisation, and with it a loss of talent and knowledge.

Some respondents were concerned that the proposal would have a negative impact on service user experience, particularly as the level of service quality may diminish as a result. Other comments called for pay scales and roles to be reviewed to remain competitive, as well as a review of service areas to establish where there is stretch and capacity. Some felt that the organisation operated a top-heavy management structure and called for this to be reviewed, alongside the expenses of Councillors.

- **Increasing commercial income**

84% agreed with the proposal to increase commercial income, however concerns were raised, including the affordability of services, particularly to charities and third-sector enterprises. Others aired caution, concerned that inward investment could be lost to neighbouring towns, whilst others highlighted the need to remain competitive and attract new investors. Some respondents referenced the challenges around town centre regeneration and the need to raise commercial prices to investors, including those from the film, events and corporate sector.

- **Review and renew contracts**

81% agreed with the proposal, however reservations around outsourcing was highlighted as a concern, particularly monitoring the quality of delivery. A number of respondents disagreed with the request for contracted organisations to implement the real living wage, stating it wasn't the Council's responsibility and could lead to services ultimately costing more. Some stakeholders felt it was more important to use our workforce effectively and pay skilled workers competitive salaries. Others called for services to be brought back in house, where budgets, quality and performance could be monitored more effectively.

- **Council Tax increase**

63% were opposed to the increase in Council Tax, with 57% stating that there should be no increase, and 43% stating any increase should be less than 4.99%. If an increase had to be implemented, the preferred option would be to raise between 2.1% and 3%.

Overwhelming stakeholders highlighted concerns with the proposal. A number questioned charging residents more for poorly delivered and reduced services. Others outlined significant economic impacts to residents, particularly the economically disadvantaged, including the working poor that can't access funding and services easily due to eligibility. Some outlined concern that it would push residents into poverty.

- **Empty and second homes**

85% agree with both of the proposals, however some thought grant exemptions should be available for certain circumstances (renovations, probate, older residents moving into residential care). Some respondents thought it wasn't a fair proposal, targeting owners that don't access additional council resources. Some thought the proposal could reduce the quality of housing stock and particularly impact those that rent.

- **Managing change**

77% agree that the budget reductions are needed and 92% are aware of the need to change the way the Council deliver services. However, 57% of stakeholders feel that the Council aren't doing its best in the current climate.

Stakeholders are particularly concerned by the financial impact the proposals would have on the borough, impacting those with socio-economic difficulties, people with disabilities and older generations supporting younger family members financially. Residents felt that implementation of the proposals could lead to a worsening in mental health, a rise in social inequality and an increase in people accessing emergency support and funding.

Some respondents raised concerns around the ineffectiveness of the Council's business delivery model and called for the organisation to review and explore alternative business approaches and solutions for making services financially viable.

An array of alternative approaches were presented, with the most popular suggestions being to review staff costings and whole council efficiency; reducing provisions within services that are non-statutory or are unaffordable; increasing charges and fines; and seeking alternative revenue streams.

- **Stakeholder priorities 2024 / 2025**

Stakeholders outlined their priorities for the financial year 2024/2025 as supporting 'community safety and tackling anti-social behaviour'; 'Adults and Children's Social Care'; and 'keeping our roads in good shape'.



## **BOLTON BOROUGH NEIGHBOURHOOD WATCH ASSOCIATION**

Monday, 08 January 2024

Re: Budget Consultation 2024 -2025

To whom it may concern

On behalf of Bolton Borough Neighbourhood Watch Association I would like to raise objections to the proposal of dimming and turning off street lighting in the Bolton area.

Bolton Borough Neighbourhood Watch Association is part of the Greater Manchester Neighbourhood Watch Association and represents local registered members of the national Neighbourhood Watch Network, the largest volunteer crime prevention organisation in England and Wales.

Although we all understand the need to take cost saving measures, these savings should not be made at the cost of safety to people or property and crime prevention.

The Royal College of Policing has published a document that shows across the 13 studies reviewed, both violent and property crime was reduced by an average of 21% in areas with improved street lighting compared to areas without.

The document goes on to say

“Specifically, improved street lighting might reduce crime through the following mechanisms.

- Increasing visibility and the number of people that use the street. This could lead to increased or more effective natural surveillance that may deter crime. If this mechanism worked as anticipated in the studies included in the review, then you would expect the effects of street lighting to be greatest during the hours of darkness. However, in the case of the four studies that only examined the impact of improved street lighting on levels of crime at night, there was no evidence of an impact on crime. In contrast, the nine studies that examined changes in levels of crime during the day and night found a statistically significant impact on crime in the areas with improved street lighting, which suggests an alternative mechanism may be in place (see next bullet).
- Demonstrating investment in the neighbourhood. This has the potential to improve community conditions that could plausibly lead to residents caring more about their neighbourhood and consequently being more likely to take actions that might reduce crime in them. The finding that improved street lighting did not have an impact on crime solely after dark is consistent with this explanation.”

The police and crime prevention organisations will always advise people to ensure their homes and communities are well lit. We all know that criminals do not like to be seen. By decreasing the amount of light in our communities it gives criminals more opportunities to commit crime undetected. Descriptions of offenders can be vital in securing convictions and lighting can play a big part in a witness being able to identify an offender. If a defence solicitor puts even the slightest bit of doubt into a jurors mind when

questioning a witness' recollection of events or how clearly they could see due to lighting in the area, it can result in a criminal walking free from court.

Reduced lighting could also delay emergency responses to incidents if house numbers are easily visible. Where minutes or seconds can be the difference between life and death, every moment can be critical. While it is the property owners responsibility to ensure their house number is visible, a lot choose to have less obvious numbers, some of which are only clear when ample lighting is applied to them. Any changes to the lighting within the borough should give ample notice to residents to make any adjustments necessary to maintain their safety and security of themselves, their property and others within the community.

We also have to consider the chances of any criminal to evade capture. Criminals wear dark clothing for a reason; it is so they cannot be seen. We should be looking at assisting our police officers in identifying and removing criminals from our streets. If you have ever chased a criminal down a street, it is imperative to keep them in sight. With reduced lighting comes increased dark areas for criminals to hide in. You could be a few feet away from someone and not know. This is before we even consider the increased risk to officers in not having good visibility not only of their surroundings but also of suspects. We do not want officers receiving injuries and reducing their already depleted numbers any further.

There is also the additional cost implications to home and business owners. Will insurance companies see the reduced lighting as an opportunity to increase the risk ratings on their policies? The increased risks equal increased costs, and while the council are looking to save money, the people in Bolton will suffer increased costs to their insurance premiums, which then can have further implications to their lives through the household budgets.

Personal safety is also an issue that should be looked at. The number one piece of advice is to stay in well-lit areas. The modern LED street lights already cast huge shadows due to the light being directional as oppose to the older sodium lamps. These shadows are partly caused by the distance between the street lights as they were positioned for radiant light as opposed to directional.

The argument could be used that anybody out walking at night could carry a torch. While that would be great advice already, a torch can also be used as a distraction or weapon. If a torch is shone at you can you see what is behind it? The answer is no! Who is behind the light? How many people are there that you can't see?

It is noted in the in the published FAQ document that the council have risk assessed all lights across the borough and 30% of these will not be dimmed. Will the council make the risk assessment documents available to the public? The document states that "certain Town Centre locations" will not be dimmed. How many shops are open overnight in the town centre? If they won't be dimmed due to safety of people using the town centre at night, then surely the same argument can be used that people using other areas of Bolton also require their safety to be protected and maintained.

Will the council publish prior to any proposal being voted on, the specific areas where it has been risk assessed that lighting should remain fully lit? Ideally this information should have been published prior to the consultation closing date.

Problems on our roads will also increase with reduced lighting. The safety of all road users should be considered. While I appreciate that less lighting may reduce speeds of vehicles due to less visibility of

hazards, there will still be those who drive at excess speed and not to the conditions. The number of road users who wear dark clothing increases the chances of serious collisions taking place.

RoSPA have published an extract from a report into nighttime accidents:

“Street lighting provides a number of important benefits. It can be used to promote security in urban areas and to increase the quality of life by artificially extending the hours in which it is light so that activity can take place. Street lighting also improves safety for drivers, riders, and pedestrians. Driving outside of daylight hours is more dangerous – only a quarter of all travel by car drivers is between the hours of 7pm and 8am, yet this period accounts for 40% of fatal and serious injuries to the same group.

Pedestrians and vulnerable road users suffer from decreased visibility in the dark too. For these reasons, ways of reducing the risk to all road users during the hours of darkness must be found.”

A few comments from our scheme coordinators who represent over 3000 Neighbourhood Watch members across Bolton

- Turning off street lighting to save money is a thoroughly bad idea. This area and its surrounds has been particularly prone to ASB and low level crime all of which would be worsened by the cover of darkness.
- I don't think the lights should be turned off, but slight dimming would be a good option.
- I'm strongly against this proposal by BMBC.  

I've noticed that when I report non-working lights these days it takes ages to get them repaired and if the lights are dimmed this will make areas much darker .

The streets are dark enough already and the new LED lights installed a few years ago were promised to save more electric and now this.

Many people won't go out at night and criminals will be less likely to be seen increasing crime. Good lighting, the Police always tells reduces crime .... Park in well-lit areas etc ..... install extra lighting etc.

The council should stop wasting money in other areas and become more efficient.

Rather not have Christmas lights and better street lighting.

As C Tax payers we get less and less from BMBC and this is a step too far.
- If Bolton Council is serious about road user safety FORGET THIS STUPID IDEA RIGHT NOW. Why do you think street lighting was introduced ?? The lighting of Bolton's roads is already diabolical. LED lighting causes shadows and black spots, the absence of lit-up keep-left signs, bollards, islands and pedestrian refuges compounds the problem. The kerb edges of many of these non-highlighted large structures and additionally pedestrians in dark clothing and the extremities of parked vehicles cannot be easily seen, especially on damp evenings. Try driving down Blackburn Rd for example in inclement weather, it tests the capabilities of the most experienced of drivers. And if you think it's an age-related problem of deteriorating eyesight think again, that's an urban myth. I know many young drivers who have difficulties. There's a growing number of people that



have ceased to drive after dusk seemingly believing this myth. You should be improving conditions Bolton Council not adding to the risks.

- I am registering my opinion on this ridiculous proposition. This is a ridiculous idea. Criminals will be able to move around undetected. People will be at greater risk of being hit by cars when crossing the road.  
Pedestrians will be unable to see trip hazards on pavements. Whoever came up with this nonsense needs to go and join the real world. Completely pratish suggestion.

- I would like to express my strong disagreement with the proposal to dim street lighting. Criminals thrive in darkness, taking advantage of reduced visibility to carry out illicit activities. The potential repercussions of dimming street lights on public safety are significant. The increased risk to both vehicle users and pedestrians poses a serious concern, especially given the modern dazzling headlights that can make obstructions and hazards harder to detect.

Moreover, with crime rates already on the rise, reducing the visibility in our neighbourhoods seems counterintuitive to effective crime prevention. Instead of addressing the root causes and finding proactive solutions to reduce criminal activity, dimming street lights may inadvertently contribute to an environment conducive to illicit behaviour.

Furthermore, I would like to highlight the potential economic consequences of this proposal. Diminished safety and security could lead to a decline in business activities and an exodus of businesses from the town. A thriving business environment depends on a sense of security, and any compromise in this regard may result in financial losses far exceeding the projected £9.1 million in savings. It is essential to consider the broader impact on the community, including potential job losses and economic downturn.

In conclusion, I urge the council to reconsider this proposal and explore alternative cost-saving measures that do not compromise the safety and well-being of the community. I believe that investing in robust crime prevention strategies and maintaining adequate street lighting is crucial for the overall prosperity and security of Bolton.

- I strongly feel this would be a mistake as burglars love the dark and there are some expensive cars around in our close and feel street lighting is a deterrent.

- No to turning offs streetlights. Streetlight dimming is a problem, reason being it is hard to see trips on the pavements. Also cars/vehicles parking on pavements, shades the light making it harder to see.

I am against any reduction in lighting. In fact I would prefer more lighting to be put in place in some areas that have little or no lighting. Although not a Bolton problem....some of the unlit motorways feel very dangerous.

It will make pedestrians feel less safe.

It could result in more pedestrians injured in road traffic accidents.

It could result in more targeted sexual assaults.

It could result in more thefts from the person.

Vehicles broken down or involved in accidents would make passengers very vulnerable. Most especially if they were unable to operate any hazard warning lights on their vehicles.

All in all....this does seem to be a no starter to me. ..

I do sympathise with trying to find a solution to saving 9.1 million. I'm glad I don't have to come up with ideas.

- The dimming and turning off of certain streetlights is indeed highly contentious. Firstly, have Greater Manchester Police and the Council Anti-social Behaviour teams been consulted about this for their input?

Secondly, how much would the monitoring and potential need for increased resources to manage problems unidentified by the proposals cost? Where I live, there are certain areas that are already poorly lit, and they are a source of significant ASB ranging from drug taking, drug dealing, congregation of large groups of people, open sexual activity, and more. Residents are already concerned about leaving their homes after dark as a direct result of the criminal activity, and our estate is notoriously difficult for the police to apprehend criminals due to the amount of dimly lit footpaths and places to hide.

Thirdly, as a woman, I am constantly receiving the message to avoid poorly lit areas due to the growing problem of serious violence against women. What plans do the Council have to reassure the women of Bolton that their safety will not be compromised by dimming or removing lighting altogether?

Can any of the lighting costs be included as part of the proposed precept on businesses operating in the nighttime economy?

- Criminals love the dark as there is less chance of them being seen as they can hide in the shadows. Safety of road users could be compromised, both vehicle users and pedestrians, more so with the lack of maintenance on the areas roads. Obstructions and hazards could be more difficult to see especially with the dazzling headlights in use on modern vehicles.

In conclusion, there are more questions than answers, and it is essential that these questions are properly explored before this proposal is voted on. This should include input from GMP, and the Council ASB and Community Safety Officers.

If the proposals are accepted by the council to reduce the street lighting across Bolton, I would request that incidents and criminal activity is regularly reviewed and if an increase in risk to people or property is seen that all changes to the lighting are reversed as a matter of urgency. These reviews should be for a minimum of 12 months as crimes can increase over the winter months due to the longer and darker nights. You cannot put a cost on a life. Crime can affect people in many different ways and can place further strain on our already overstretched emergency services.

Neil McCall | Area Representative

**BOLTON BOROUGH NEIGHBOURHOOD WATCH ASSOCIATION**

Email: [boltonboroughnwa@outlook.com](mailto:boltonboroughnwa@outlook.com)

Tel/WhatsApp: 07762 405214