

**Equality Impact  
Assessment  
for  
Policy for Awarding  
Discretionary Rate Relief**

DRAFT - HEREFORDLSCT

<b>Service Area</b>	<b>Revenues &amp; Benefits Service</b>
<b>Policy/Service being assessed</b>	<b>Policy for awarding Discretionary Rate Relief (includes Rural Rate Relief and Hardship Relief)</b>
<b>Is this is a new or existing policy/service?</b>	<b>Existing Policy</b>
<b>If existing policy/service please state date of last assessment</b>	<b>March 2013</b>
<b>EIA Review team – List of members</b>	<b>NNDR Project Group</b>
<b>Date of this assessment</b>	<b>05 December 2013</b>
<b>Signature of completing officer (to be signed after the EIA has been completed)</b>	<b>Anne Phillips</b>
<b>Name and signature of Head of Service (to be signed after the EIA has been completed)</b>	<b>Peter Robinson</b>

DRAFT - HEREFORDLSCT

## Form A1

### INITIAL SCREENING FOR STRATEGIES/POLICIES/FUNCTIONS FOR EQUALITIES RELEVANCE TO ELIMINATE DISCRIMINATION AND PROMOTE EQUALITY



High relevance/priority



Medium relevance/priority



Low or no relevance/ priority

**Note:**

1. Tick coloured boxes appropriately, and depending on degree of relevance to each of the equality strands
2. Summaries of the legislation/guidance should be used to assist this screening process

Policy – Rate Relief	Relevance/Risk to Equalities																										
State the Function/Policy /Service/Strategy being assessed:	Gender			Race			Disability			Sexual Orientation			Religion/Belief			Age			Socio-economic			Priority status For EIA					
	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓			
<b>Mandatory Rate Relief awarded to:-</b> <ul style="list-style-type: none"> <li>• Charities;</li> <li>• Community Amateur Sports Clubs;</li> <li>• The following types of property situated in a rural settlement: Post Office, General Store, Food Shop, Public House and Petrol Filling Station.</li> </ul>																											
	✓																										

Policy – Rate Relief	Relevance/Risk to Equalities																							
	Gender			Race			Disability			Sexual Orientation			Religion/Belief			Age			Socio-economic			Priority status For EIA		
State the Function/Policy /Service/Strategy being assessed:	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
<b>Discretionary Rate Relief to “top up” the 80% Mandatory relief</b> Relief of 20% for registered charities (to top up the 80% mandatory relief) where the property is being used by: <ul style="list-style-type: none"> <li>Charities that are locally based (are not national organisations) and which provide facilities that benefit the wider community of Herefordshire and are of a social/welfare nature;</li> <li>Community Halls – provided non-profit making community users are in paramount occupation.</li> <li>Scouts and Guides – where the Scouts or Guides are in paramount occupation.</li> <li>Credit Unions - where dividend or interest is available for distribution to its members and assistance is provided to avoid social exclusion.</li> </ul>			✓			✓			✓			✓			✓			✓			✓			✓
<b>Discretionary Rate Relief</b> <ul style="list-style-type: none"> <li>Sports Clubs and other non-profit making organisations;</li> </ul>			✓			✓			✓			✓			✓			✓			✓			✓

Policy – Rate Relief	Relevance/Risk to Equalities																							
	Gender			Race			Disability			Sexual Orientation			Religion/Belief			Age			Socio-economic			Priority status For EIA		
State the Function/Policy /Service/Strategy being assessed:	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
<ul style="list-style-type: none"> <li>Other rural businesses within a rural settlement subject to a rateable value threshold £16k</li> <li>Community Interest Companies</li> <li>Other ratepayers</li> </ul>			✓			✓			✓			✓			✓			✓			✓			✓

<p><b>Stage 1 – Scoping and Defining</b></p> <p>(1) What are the aims and objectives of policy changes</p>	<p><b>Mandatory / discretionary top up</b> -The revised policy will reduce eligibility for mandatory/discretionary top up and only include charities and organisations that are supporting:-</p> <ul style="list-style-type: none"> <li>children and youth</li> <li>social and health welfare groups</li> <li>Sports clubs.</li> </ul> <p>This will remove eligibility for:-</p> <ul style="list-style-type: none"> <li>some village/community halls</li> <li>religious and community groups,</li> <li>theatres and museums</li> </ul> <p>The policy wording will be revised to state “top up” discretionary rate relief will be awarded to:-</p> <ul style="list-style-type: none"> <li>Charities that are locally based (are not national organisations) and which provide</li> <li>facilities that benefit the wider community of Herefordshire and are of a social/welfare nature;</li> <li>Scouts and Guides and other local youth / children’ groups – where</li> </ul>
--	---

the group has paramount occupation.

- Social and health welfare groups to include hospices and Credit Unions -.

**Businesses in Rural Settlements** – The revised policy will remove the discretionary rate relief element in full

**Discretionary for other qualifying organisations** The revised policy will remove discretionary rate relief element in full and will only award where the organisation is supporting:-

- children and youth
- social and health welfare groups
- Sports clubs.

The amount of relief will be based on the following factors:

- The organisation is not established or conducted for profit and must be able to demonstrate a direct benefit to the County of Herefordshire or to the public at large within the county.
- The level of assets and annual income of the organisation.

The following additional factors will be taken into account and if more than 5 apply relief will not be granted:-

- Membership is restricted. (This will include where membership rates are set at a high level as to exclude the general community.)
- The organisation runs a bar and the gross income from bar sales exceeds £2,000 per annum.
- The percentage of members who live in Herefordshire is less than 80% unless there are valid reasons for this e.g. a club situated on the border.
- The facilities are only made available to members.
- The facilities are not available for use by children.
- Similar facilities are already provided by the Council and the organisation does not supplement or enhance these.

	<p><b>NB: The budget proposals of 05.12.13 are to be added when finalised</b></p> <p>For those organisations who will lose out from this change, an alternative to the current reliefs may be <b>Small Business Rate Relief</b>, which is government funded. The standard small business rate scheme allows for 50% relief for properties which fit the criteria with a rateable value of less than 6k and taper relief is given for organisations with rateable value between 6k and 12k.</p> <p>Currently a temporary extension to the scheme is in place which provides full relief (100%) for organisations, who fit the criteria, with a rateable value of less than 6k and taper relief is given for organisations with rateable value between 6k and 12k. This was due to expire on 31.03.14 however it has been extended to <b>31.03.14</b></p>
<p><b>(2) How do the policy changes fit with the council's wider objectives?</b></p>	<p>The policy meets with the corporate objectives in as far as possible in equality and sustainability. This is a key decision relating to Herefordshire Council's Budget and Policy Framework</p>
<p><b>(3) What are the expected outcomes of the policy changes? Who is intended to benefit from the policy changes and in what way?</b></p>	<p>The desired outcomes are as follows;</p> <ul style="list-style-type: none"> <li>• Financial savings - the proposal it is likely to result in the Council generating additional revenue in 2015-16.</li> <li>• The following groups will continue to benefit from these changes to policy:- <ul style="list-style-type: none"> <li>○ children and youth</li> <li>○ social and health welfare groups</li> <li>○ Sports clubs.</li> </ul> </li> </ul> <p>The proposals changes to the policy could see charities and applicable organisations having reduced NNDR discounts and could affect their viability.</p>

<p><b>(4) Do these policy changes have the potential to directly or indirectly discriminate against any particular group?</b></p> <p>Please identify all groups that are affected and briefly explain why</p>	<p><b>RACE</b> <b>NO</b></p> <p>The Rate Relief policy does not take race into account.</p>	<p><b>AGE</b> <b>No</b></p> <p>The Rate Relief policy does not take race into account.</p>	<p><b>GENDER</b> <b>NO</b></p> <p>The Rate Relief policy does not take gender into account.</p>
	<p><b>RELIGION/BELIEF</b> <b>NO</b></p> <p>The Rate Relief policy does not take religion or belief into account.</p>	<p><b>DISABILITY</b> <b>NO</b></p> <p>The Rate Relief policy does not take race into account.</p>	<p><b>SEXUAL ORIENTATION</b> <b>NO</b></p> <p>The support scheme does not take sexual orientation into account when calculating the level of support</p>

<p><b>(5) Are there any obvious barriers to accessing the service?</b></p>	<p>No – The viability of the organisations continuing may be affected by the removal of the discretionary reduction in rates therefore removing the service to the citizens</p>
<p><b>(6) How do the policy changes contribute to promotion of equality?</b></p>	<p>The policy changes are aligned to the objectives of Herefordshire Council</p>
<p><b>(7) Do the policy changes have the potential to promote good relations between groups?</b></p>	<p>Unknown</p>



<b><u>Stage 2 - Information Gathering</u></b>	
<b>(1) What type and range of evidence or information have you used to help you make a judgement about the policy or service?</b>	Evidence will be obtained from communication with various services within Herefordshire Council:- <ul style="list-style-type: none"> <li>• Housing</li> <li>• Children's Services</li> <li>• Adult Services</li> </ul>
<b>(2) What consultation/ information has been used? What new consultation, if any, do you need to undertake?</b>	Full consultation is not applicable.  Information will be sought externally through discussions with the Parishes and the business community.

DRAFT - HEREFORD LSCT

<b><u>Stage 3 – Making a Judgement</u></b>	
<p><b>(1) From your data and consultations is there any adverse or negative impact identified for any particular group?</b></p> <p><b>Is there any evidence of needs not being met?</b>  <b>e.g. language or physical access barriers; lack of appropriate resources or facilities</b></p>	<p>To be completed following information gathering complete</p> <p><b>The proposals set out in this report could see charities and applicable organisations having reduced NNDR discounts which could affect their viability. Legally any policy change is subject to 12 months notice for existing recipients</b></p>
<p><b>(2) If there is an adverse impact, can this be justified?</b></p>	<p>To be completed following information gathering complete</p>
<p><b>(3) What actions are going to be taken to reduce or eliminate negative or adverse impact?</b></p>	<p>To be completed following information gathering complete</p>
<p><b>(4) Is there any positive impact? Does it promote equality of opportunity between different groups and actively address discrimination?</b></p>	<p>To be completed following information gathering complete</p>

<b><u>Stage 4 – Action Planning, Review &amp; Monitoring</u></b>	
<p>If No Further Action is required then go to – Review &amp; Monitoring</p> <p>(1) Action Planning – Specify any changes or improvements which can be made to the service or policy to mitigate or eradicate negative or adverse impact on specific groups, including resource implications.</p>	No
<p>(2) Review and Monitoring State how and when you will monitor policy and EIA Action Plan</p>	<p>The Revenues and Benefits Service will monitor the impact of the changes through monthly reports.</p> <p>The Council will review the policy in line with further legislation changes or corporate changes.</p>

‘An Equality Impact Assessment on this policy was undertaken on 05 December 2013’