

Please ensure that you refer to the Screening Form Guidance while completing this form.

**Which service area and directorate are you from?**

Service Area: Revenues and Benefits

Directorate: Finance

**Q1 (a) What are you screening for relevance?**

- New and revised policies, practices or procedures
- Service review, re-organisation or service changes/reductions, which affect the wider community, service users and/or staff
- Efficiency or saving proposals
- Setting budget allocations for new financial year and strategic financial planning
- New project proposals affecting staff, communities or accessibility to the built environment, e.g., new construction work or adaptations to existing buildings, moving to on-line services, changing location
- Large Scale Public Events
- X Local implementation of National Strategy/Plans/Legislation
- Strategic directive and intent, including those developed at Regional Partnership Boards and Public Services Board, which impact on a public bodies functions
- Medium to long term plans (for example, corporate plans, development plans, service delivery and improvement plans)
- Setting objectives (for example, well-being objectives, equality objectives, Welsh language strategy)
- Major procurement and commissioning decisions
- Decisions that affect the ability (including external partners) to offer Welsh language opportunities and services
- Other

**(b) Please name and fully describe initiative here:**

The Council Tax Reduction Scheme (CTRS) (default scheme) (Wales) Regulations 2013 require that each Local Authority adopt the default scheme with annual amendments for each year by 31st January preceding the start date of 1st April. This proposal is to fulfil this requirement for 2023/2024.

Once again there are no significant changes for 2023/24 compared to 2022/2023.

It was initially screened for relevance to Equality and Diversity in 2013, on 14/12/18, 7/1/20, 13/1/21, 02/12/21 and reviewed again on 7/12/22

**Q2 What is the potential impact on the following: the impacts below could be positive (+) or negative (-)**

|                                     | High Impact              |                          | Medium Impact            |                          | Low Impact               |                          | Needs further investigation |
|-------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|-----------------------------|
|                                     | +                        | -                        | +                        | -                        | +                        | -                        |                             |
| Children/young people (0-18)        | <input type="checkbox"/> | <input type="checkbox"/> | X                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>    |
| Older people (50+)                  | <input type="checkbox"/> | <input type="checkbox"/> | X                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>    |
| Any other age group                 | <input type="checkbox"/> | <input type="checkbox"/> | X                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>    |
| Future Generations (yet to be born) | <input type="checkbox"/> | <input type="checkbox"/> | X                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>    |
| Disability                          | <input type="checkbox"/> | <input type="checkbox"/> | X                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>    |
| Race (including refugees)           | <input type="checkbox"/> | <input type="checkbox"/> | X                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>    |
| Asylum seekers                      | <input type="checkbox"/> | <input type="checkbox"/> | X                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>    |
| Gypsies & travellers                | <input type="checkbox"/> | <input type="checkbox"/> | X                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>    |
| Religion or (non-)belief            | <input type="checkbox"/> | <input type="checkbox"/> | X                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>    |
| Sex                                 | <input type="checkbox"/> | <input type="checkbox"/> | X                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>    |
| Sexual Orientation                  | <input type="checkbox"/> | <input type="checkbox"/> | X                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>    |
| Gender reassignment                 | <input type="checkbox"/> | <input type="checkbox"/> | X                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>    |
| Welsh Language                      | <input type="checkbox"/> | <input type="checkbox"/> | X                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>    |
| Poverty/social exclusion            | X                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>    |

|                              |                          |                          |                          |                          |                          |                          |
|------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Carers (inc. young carers)   | X                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Community cohesion           | <input type="checkbox"/> | <input type="checkbox"/> | X                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Marriage & civil partnership | <input type="checkbox"/> | <input type="checkbox"/> | X                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Pregnancy and maternity      | <input type="checkbox"/> | <input type="checkbox"/> | X                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

The Council Tax Reduction (CTR) Scheme is available to anyone that has a reduced income and satisfies the general eligibility criteria set by Welsh Government, and includes most of the protected characteristics above.

**Q3 What involvement has taken place/will you undertake e.g. engagement/consultation/co-productive approaches? Please provide details below – either of your activities or your reasons for not undertaking involvement**

There is very limited discretion within the scheme and consultation in respect of that is carried out periodically. The authority last carried out a consultation exercise from the 1<sup>st</sup> to the 30<sup>th</sup> of November 2018. Although a previous consultation exercise had been carried out in 2013 and the scheme had remained broadly the same since then. Welsh Government is reviewing the current CTR scheme with a view to potentially making significant changes to the regulations possibly for implementation in 2024/25. Part of that process will no doubt require Welsh Government to engage in consultation on their new regulations and with that in mind it is not considered necessary to refresh our local consultation on the current scheme at this time. Welsh Government has recently advised Welsh local authorities that the next consultation in respect of its Council Tax Reduction scheme will take place in October 2023.

**Q4 Have you considered the Well-being of Future Generations Act (Wales) 2015 in the development of this initiative:**

The content of the Legislation is determined by Welsh Government who would be responsible for taking this into consideration in their legislative development processes.

- a) Overall does the initiative support our Corporate Plan’s Well-being Objectives when considered together?  
Yes
- b) Does the initiative consider maximising contribution to each of the seven national well-being goals?  
Yes
- c) Does the initiative apply each of the five ways of working?  
Yes

**Long Term -**

The CTR Scheme is a pan Wales scheme and the Local Authority has limited flexibility to amend any element. As such we cannot confirm that the scheme will be in operation in the same way year on year due to the considerations of Welsh Government Ministers. Ministers are currently considering the future of the scheme and it is likely that in the future significant changes will be made to the scheme.

**Prevention -**

By adopting the scheme we are able to ensure that low income households are able to access financial support to help with their Council Tax liability.

**Integration -**

As a department we continuously work with stakeholders including the Housing Department, Social Services and the Financial Inclusion Steering Group to promote the CTR Scheme.

**Collaboration -**

As a department we continuously work with stakeholders including the Housing Department, Social Services and the Financial Inclusion Steering Group to promote the CTR Scheme.

**Involvement -**

The CTR Scheme is available to all householders with a council tax liability who following submission of an application may have a reduction awarded based on the scheme's regulations.

d) Does the initiative meet the needs of the present without compromising the ability of future generations to meet their own needs?

Yes

**Q5 What is the potential risk of the initiative? (Consider the following impacts – equality, socio-economic, environmental, cultural, legal, financial, political, media, public perception etc...)**

High risk

X

Medium risk

Low risk

**Q6 Will this initiative have an impact (however minor) on any other Council service?**

Yes

If yes, please provide details below

Payment of CTR by the Benefits Service at the appropriate amount will:

- Reduce the amount of Council Tax to be collected by the Revenues Service
- Help maximise income to households in need which should help reduce the workload of the Poverty and Prevention Service, Social Services in general & the Housing Department.

**Q7 Will this initiative result in any changes needed to the external or internal website?**

Yes

If yes, please provide details below

We will consider if we need to update the information on the external website based on the terms of the new regulations (minor changes only are expected, if in fact anything at all)

**Q8 What is the cumulative impact of this proposal on people and/or communities when considering all the impacts identified within the screening and any other key decisions affecting similar groups/ service users made by the organisation?**

*(You may need to discuss this with your Service Head or Cabinet Member to consider more widely if this proposal will affect certain groups/ communities more adversely because of other decisions the organisation is making. For example, financial impact/poverty, withdrawal of multiple services and whether this is disadvantaging the same groups, e.g., disabled people, older people, single parents (who are mainly women), etc.)*

The proposal will ensure we are able to award CTR to support those in need without the imposition of a National scheme under which we have less flexibility to be more generous on a small number of points – for example allowing the full amount of War pensions to be disregarded as income when assessing the amount of CTR to be awarded.

The Council Tax Reduction Scheme is available to anyone that has a reduced income and satisfies the general eligibility criteria.

**The main positive impacts are:**

By adopting the scheme we are able to ensure that low income households are able to access financial support to help with their Council Tax liability.

**The main negative impacts are:**

No negative impacts have been identified against any groups/ communities. Adopting a CTR Scheme is a positive action for the authority and will reduce the Council Tax to be paid by Swansea Citizens by an estimated £22.55m based on 22/23 figures.

**Outcome of Screening****Q9 Please describe the outcome of your screening using the headings below:**

- **Summary of impacts identified and mitigation needed (Q2)**
- **Summary of involvement (Q3)**
- **WFG considerations (Q4)**
- **Any risks identified (Q5)**
- **Cumulative impact (Q7)**

**Summary of impacts identified and mitigation needed (Q2)**

The report fulfils the legal requirement placed upon the Council under The Council Tax Reduction Scheme (CTRS) (default scheme) (Wales) Regulations 2013 to annually adopt a Council Tax Reduction Scheme for the coming financial year.

The impacts identified in Q2 are all positive. No mitigation is required although the Revenues and Benefits Service seeks to maximise entitlement to CTR wherever possible. This is assisted by colleagues in other departments such as Housing and Social Services.

**Summary of involvement (Q3)**

Consultation on the small number of discretionary areas in the regulations takes place periodically. However, Welsh Government is reviewing the current CTR scheme with a view to potentially making significant changes to the regulations possibly for implementation in 2024/25. Part of that process will no doubt require Welsh Government to engage in consultation on their new regulations and with that in mind it is not considered necessary to refresh our local consultation on the current scheme at this time. Welsh Government has recently advised Welsh local authorities that the next consultation in respect of its Council Tax Reduction scheme will take place in October 2023.

**WFG considerations (Q4)**

The content of the Legislation is determined by Welsh Government who would be responsible for considering the Well-being of Future Generations Act (Wales) 2015 in the development of this initiative

**Any risks identified (Q5)**

Failure to adopt the scheme could lead to financial hardship for citizens, increased Council Tax Arrears and reputational damage to the authority.

By adopting the scheme we are able to ensure that low income households are able to access financial support to help with their council tax liability.

**Cumulative impact (Q7)**

By adopting the scheme we are able to ensure that low income households are able to access financial support to help with their Council Tax liability. There are no negative impacts. Adopting a CTR Scheme is a positive action for the authority and will reduce the Council Tax to be paid by Swansea Citizens by an estimated £22.55m based on 22/23 figures.

(NB: This summary paragraph should be used in the **'Integrated Assessment Implications'** section of corporate report)

Full IIA to be completed

Do not complete IIA – please ensure you have provided the relevant information above to support this outcome

NB: Please email this completed form to the Access to Services Team for agreement before obtaining approval from your Head of Service. Head of Service approval is only required via email.

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| <b>Screening completed by:</b>                           |
| <b>Name:</b> Julian Morgans                              |
| <b>Job title:</b> Interim Head of Revenues and Benefits  |
| <b>Date:</b> 7/12/22                                     |
| <b>Approval by Head of Service:</b>                      |
| <b>Name:</b> Ben Smith                                   |
| <b>Position:</b> Chief Finance Officer (Sec 151 Officer) |
| <b>Date:</b> 7/12/22                                     |

Please return the completed form to [accesstoservices@swansea.gov.uk](mailto:accesstoservices@swansea.gov.uk)