

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
- 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 (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/report is to fulfil this requirement for 2024/2025.

Once again there are no significant changes for 2024/25 compared to 2023/2024. 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, 7/12/22 and reviewed again on 19/12/23

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	No Impact
	+	-	+	-	+	-		
Children/young people (0-18)	<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"/>
Older people (50+)	<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"/>
Any other age group	<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"/>
Future Generations (yet to be born)	<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"/>
Disability	<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"/>
Race (including refugees)	<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"/>
Asylum seekers	<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"/>
Gypsies & travellers	<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"/>
Religion or (non-)belief	<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"/>
Sex	<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"/>
Sexual Orientation	<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"/>
Gender reassignment	<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"/>
Welsh Language	<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"/>

Poverty/social exclusion	<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"/>
Carers (inc. young carers)	<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"/>
Community cohesion	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marriage & civil partnership	<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"/>
Pregnancy and maternity	<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"/>
Human Rights	<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"/>

The Council Tax Reduction Scheme (CTRS) 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 as a matter of good practice. The authority carried out a consultation exercise on the discretionary areas from the 6th November 2023 to 3rd December 2023. Welsh Government is currently reviewing the CTRS with a view to potentially making significant changes to the regulations, possibly for implementation in 2025/26 (those plans/dates are not confirmed as yet).

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 No
- b) Does the initiative consider maximising contribution to each of the seven national well-being goals?
 Yes No
- c) Does the initiative apply each of the five ways of working?
 Yes No
- d) Does the initiative meet the needs of the present without compromising the ability of future generations to meet their own needs?
 Yes No

Long Term -

The CTRS is a pan Wales scheme and the Authority has limited flexibility to amend it. As such, we cannot confirm that the scheme will operate in the same way year on year in the future as how it is written will reflect the wishes of the Welsh Government and its Ministers. Ministers are currently considering the future of the scheme and it is likely that changes, significant or otherwise, will be made at some point.

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

Medium risk

Low risk

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

Yes

No

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

No

If yes, please provide details below

Q8 Does the initiative involve changes to the way you process the personal data of Council staff or service users, for example the purchase of new customer management software?

Yes

No

If your answer is yes, you should also screen the initiative for any implications regarding privacy and other GDPR rights and consider whether you need to amend your entry in the Council's Information Asset Register. Please use the following link to the online screening form for a Data Protection Impact Assessment <https://staffnet.swansea.gov.uk/dpiascreeing>

For more about the Information Asset Register, please see <https://staffnet.swansea.gov.uk/informationassetregister>

Q9 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?

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 £24m based on 23/24 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 (Q9)**

Summary of impacts identified and mitigation needed (Q2)

The report fulfils the legal requirement placed upon the Council under The Council Tax Reduction Schemes and Prescribed Requirements (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 Council Tax Reduction 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 and the exercise has been carried out in November 2023. A summary of the outcome of this consultation is provided as an appendix (A) to the report.

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 £24m based on 23/24 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.

Screening completed by:
Name: Julian Morgans
Job title: Interim Head of Revenues and Benefits
Date: 19/12/23
Approval by Head of Service:
Name: Ben Smith
Position: Chief Finance Officer (Sec 151 Officer)
Date: 19/12/23

Please return the completed form to accesstoservices@swansea.gov.uk