



Equality Analysis Form

The following questions will document the effect of your service or proposed policy, procedure, working practice, strategy or decision (hereafter referred to as 'policy') on equality, and demonstrate that you have paid due regard to the Public Sector Equality Duty.

1. RESPONSIBILITY

Department	Communities and Wellbeing	
Service	Workforce Modernisation	
Proposed policy	Future Service Options for Social Care Provider Services – LATCO Business plan and establishment of organisation – final sign off	
Date	25 March 2015	
Officer responsible for the 'policy' and for completing the equality analysis	Name	Kat Sowden
	Post Title	Head of Workforce Modernisation
	Contact Number	0161 253 5406
	Signature	
	Date	25 March 2015
Equality officer consulted	Name	Mary Wood
	Post Title	Principal Officer - Equalities
	Contact Number	0161 253 6795
	Signature	 19/2015
	Date	26 March 2015

2. AIMS

What is the purpose of the policy/service and what is it intended to achieve?	<p>The services concerned provide social care support to vulnerable adults within Bury and comprise Supported Accommodation, Learning Disability, Physical Disability and Older People Day Services, Short Stay and Shared Lives operating from a variety of bases around the borough. The purpose is to ensure that people are supported to maximise their life opportunities and independence and to maintain health and wellbeing.</p> <p>These services are used in the main by people with physical and/or learning disabilities and older people.</p> <p>The services in question have already experienced significant cuts, and more will be required in 2015/16 and beyond. Benchmarking has highlighted that the costs of the service are high compared to other providers.</p>
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Maintaining the current service design is not financially sustainable going forward, and the service will be unlikely to adapt to meet the current and future demands of customers within the existing structures.

A range of different delivery options have been considered, balancing financial return with staff, customer impact and the extent to which the Council can continue to influence and control provision / standard of services going forward.

Following Cabinet approval to undertake an option appraisal, work has taken place to get the views of staff and stakeholders, and evaluate options in a number of key areas, e.g. Finance, Property, Procurement.

This work was concluded and recommended that the alternative delivery model option was the preferred option. This was approved by Cabinet in October 2014.

Significant additional work and further consultation has taken place to determine the form this should take and it was agreed by Cabinet on 21 January 2015 that the operating model should be a Local Authority Trading Company.

Since this decision a full business plan has been developed for approval by Cabinet on 8 April 2015, recommending proceeding to establish a Local Authority Trading Company

This equality analysis relates to the recommendation to approve the business plan, confirming the assumptions and financial modelling used to develop it and to proceed to establish a Local Authority Trading Company, This is required to inform the Cabinet decision making by demonstrating the equality characteristics of customers and staff and the impact the development of a Local Authority Traded Company may have on equality.

In order to inform the equality analysis staff and customer profiles have been considered and engagement with staff and customers was undertaken during July / August / November 2014 and January/February/March 2015.

In addition 29 customer/carer/staff drop-ins have taken place to answer questions and queries during October and November 2014. These raised no further issues than those previously identified once any concerns about continuity of care had been allayed.

This equality analysis deals solely with the impact in respect of provider services, however it is recognised that the development of a Local Authority Trading Company

	<p>may have an impact on support services in the department and Council but it is not possible to identify this at this stage. This will become apparent during the transition and shadow phase and will be dealt with more fully in a later analysis.</p>
<p>Who are the main stakeholders?</p>	<p>Customers of provider services Families Carers Staff Dept of Communities & Wellbeing Councillors Unison Support Services</p>

3. ESTABLISHING RELEVANCE TO EQUALITY

3a. Using the drop down lists below, please advise whether the policy/service has either a positive or negative effect on any groups of people with protected equality characteristics.

If you answer yes to any question, please also explain why and how that group of people will be affected.

Protected equality characteristic	Positive effect (Yes/No)	Negative effect (Yes/No)	Explanation
Race	No	No	
Disability	Yes	Yes	<p>The majority of customers supported in these service areas have a learning and/or physical disability or sensory impairment. The governance for the proposed LATCO provides the opportunity for more involvement in the operation of the organisation by customers through the stakeholder forums which would have a positive impact. Also the new service may be able to offer new and more flexible services to customers and would be working towards being delivered at a more affordable price. In addition, the services would be more sustainable offering better security to customers in the future. Under this option customers would benefit from the familiarity and continuity of staff they know and trust.</p> <p>The business plan has identified an area of possible growth as providing services to a wider group than currently, enabling direct payment recipients, people who self fund and who are not eligible under Fair Access to Care Services (FACS) criteria to access support. This would contribute to the wellbeing and independence of people at an early stage which may reduce/delay their dependence on health and social care services in the future.</p> <p>Setting up a LATCO may be concerning to some people as it is something which they are not familiar with and therefore seems uncertain and risky. The majority of customers and their carers have expressed their satisfaction with the current service they receive and are therefore likely to find this detrimental. However, ongoing feedback from customers and carers indicates that they are comfortable with the information being provided to them and the proposed vision for the new organisation.</p>

Gender	Yes	Yes	<p><i>This impact relates to staff rather than customers. Within this area the majority of the workforce is female. Proportions range from 70% to 88% females within all teams. This is similar to the Council as a whole. This option would maintain employment for staff as they would transfer to the new model and is anticipated to be more sustainable in the future. The governance proposed for the LATCO provides the opportunity for staff to be represented on the Board of the organisation as well as more general engagement via stakeholder forums. This allows greater direct involvement in the operation of the organisation and development of new and flexible services which is positive.</i></p> <p><i>However development of a LATCO is perceived by some staff as detrimental, despite the fact that TUPE would technically protect their terms and conditions of employment. This would affect more females than males due to the demographic makeup of the workforce. In addition, there could be an increased equal pay risk as the new organisation would be perceived as an 'associated employer'.</i></p>
Gender reassignment	No	No	
Age	Yes	yes	<p>Within the Older People's short stay, residential and day care the majority of customers are elderly. The governance for the proposed LATCO provides the opportunity for more involvement in the operation of the organisation by customers through the stakeholder forums which would have a positive impact. Also the new service may be able to offer new and more flexible services to customers and would be working towards being delivered at a more affordable price. In addition, the services would be more sustainable offering better security to customers in the future. Under this option customers would benefit from the familiarity and continuity of staff they know and trust.</p> <p>The business plan has identified an area of possible growth as providing services to a wider group than currently, enabling direct payment recipients and people who self fund and who are not eligible under Fair Access to Care Services (FACS) criteria to access support. This would contribute to the wellbeing and independence of people at an early stage which may reduce/delay their dependence on health and social care services in the future.</p> <p>Setting up a LATCO may be concerning to some people as it is something which they are not familiar with and therefore seems uncertain and risky. The majority of customers and their carers have expressed their satisfaction with the current service they receive and are therefore likely to find this detrimental.</p>

Sexual orientation	No	No	
Religion or belief	No	No	
Caring responsibilities	Yes	Yes	<p>Although the customer group concerned do not generally have caring responsibilities, many of them are supported by family and carers. Therefore people with caring responsibilities could be impacted as the purpose of many of these services is to provide respite and carer break which enables the carer to continue to provide support and to live their own life e.g. working etc. The governance for the proposed LATCO provides the opportunity for more involvement in the operation of the organisation by customers through the stakeholder forums which would have a positive impact. Also the new service may be able to offer new and more flexible services to customers and would be working towards being delivered at a more affordable price. In addition, the services would be more sustainable offering better security to customers in the future.</p> <p>The business plan has identified an area of possible growth as providing services to a wider group than currently, enabling direct payment recipients and people who self fund and who are not eligible under Fair Access to Care Services (FACS) criteria to access support. This would contribute to the wellbeing and independence of people at an early stage which may reduce/delay their dependence on health and social care services in the future and have a knock-on positive impact on their carers.</p> <p>Setting up a LATCO may be concerning to some people as it is something which they are not familiar with and therefore seems uncertain and risky. The majority of customers and their carers have expressed their satisfaction with the current service they receive and are therefore likely to find this detrimental.</p>
Pregnancy or maternity	No	No	
Marriage or civil partnership	No	No	

3b. Using the drop down lists below, please advise whether or not our policy/service has relevance to the Public Sector Equality Duty.

If you answer yes to any question, please explain why.

General Public Sector Equality Duties	Relevance (Yes/No)	Reason for the relevance
Need to eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited by the Equality Act 2010	No	
Need to advance equality of opportunity between people who share a protected characteristic and those who do not (eg. by removing or minimising disadvantages or meeting needs)	Yes	<p>People with protected characteristics are supported to maximise their life opportunities and independence and maintain their health and wellbeing. The proposed vision for the LATCO focuses on maximising opportunities for people with disabilities, older people and carers, developing new and more flexible services and encouraging improved wellbeing and increased independence.</p> <p>The business plan has identified a possible growth area as offering services to a wider group of people who are not currently eligible to access support from provider services thus contributing to the early intervention and prevention agenda and potentially reducing their reliance on health and social care services in the future.</p>
Need to foster good relations between people who share a protected characteristic and those who do not (eg. by tackling prejudice or promoting understanding)	No	

If you answered 'YES' to any of the questions in 3a and 3b

Go straight to Question 4

If you answered 'NO' to all of the questions in 3a and 3b

Go to Question 3c and do not answer questions 4-6

3c. If you have answered 'No' to all the questions in 3a and 3b please explain why you feel that your policy/service has no relevance to equality.

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4. EQUALITY INFORMATION AND ENGAGEMENT

4a. For a service plan, please list what equality information you currently have available, **OR** for a new/changed policy or practice please list what equality information you considered and engagement you have carried out in relation to it.

Please provide a link if the information is published on the web and advise when it was last updated?

(NB. Equality information can be both qualitative and quantitative. It includes knowledge of service users, satisfaction rates, compliments and complaints, the results of surveys or other engagement activities and should be broken down by equality characteristics where relevant.)

Details of the equality information or engagement	Internet link if published	Date last updated
Customer demographics		2013
Feedback from staff and customers – briefing packs and sessions conducted during July/August 2014		August 2014
Staff demographics		August 2014
Options Appraisal		
Case Studies of Alternative Delivery Models		
Feedback from road shows for staff and customers		November 2014
LATCo Business plan		March 2015

4b. Are there any information gaps, and if so how do you plan to tackle them?

Further data will be gathered during the transition phase of work in order to formalise agreements and understand the exact detail of the transfer into the new organisation in respect of staff and customers.

5. CONCLUSIONS OF THE EQUALITY ANALYSIS

<p>What will the likely overall effect of your policy/service plan be on equality?</p>	<p>Positive – people with protected characteristics who use the services would have a more secure future in terms of the service they receive continuing and developing. People who use services will have the opportunity to be more engaged in how the organisation operates and develops services through the stakeholder forums. A possible growth area has been identified as people with protected characteristics who currently are not eligible to access provider services but would benefit from proactive support to reduce their longer term reliance on health and social care services and maintain/improve their health, wellbeing and independence.</p>
<p>If you identified any negative effects (see questions 3a) or discrimination what measures have you put in place to remove or mitigate them?</p>	<p>Much of the negative impact is centred around unfamiliarity with the LATCo model and the uncertainty and risks the change will involve. Mitigation of negative effects will be considered as part of the stakeholder engagement plan in the transition phase and will need to include good communication with and reassurance to customers.</p>
<p>Have you identified any further ways that you can advance equality of opportunity and/or foster good relations? If so, please give details.</p>	<p>The organisation could develop partnerships with other groups that support people with protected characteristics to maximise mutually beneficial arrangements.</p>
<p>What steps do you intend to take now in respect of the implementation of your policy/service plan?</p>	<p>A report will be considered by Cabinet 8 April 2015 and will seek final sign off to establish the LATCo in accordance with the detailed business plan.</p> <p>If this is approved then the organisation will move into shadow form and a transition period before formally going live 1 October 2015.</p>

6. MONITORING AND REVIEW

If you intend to proceed with your policy/service plan, please detail what monitoring arrangements (if appropriate) you will put in place to monitor the ongoing effects. Please also state when the policy/service plan will be reviewed.

The Future Service Options Strategic Delivery Team will oversee the establishment of the LATCo during the transition and shadow phase to ensure the go live date of 1st October 2015 is achieved. A governance framework is proposed within the business plan consisting of a Council Shareholder Panel holding the LATCo accountable via the LATCo Board.

COPIES OF THIS EQUALITY ANALYSIS FORM SHOULD BE ATTACHED TO ANY REPORTS/SERVICE PLANS AND ALSO SENT TO THE EQUALITY INBOX (equality@bury.gov.uk) FOR PUBLICATION.