

## Screening Form - Equality

- 1. Is this a** Policy
- 2. Name of Policy/Strategy/Plan/Public Service** Treasury and Investment Management Policy and Practices
- 3. Reference** 290
- 4. Category of Policy/Strategy/Plan/Public Service** Revised

**5. Please provide a description of the Policy/Strategy/Plan/Public Service**

The purpose of this document is to set out the Council's policy and practices for the Treasury Management function in accordance with legislative requirements and the CIPFA Code of Practice on Treasury Management.

**6. Please provide details of the aims and/or objectives of the Policy, Strategy, Plan or Public Service.**

This Council regards the successful identification, monitoring and control of risk to be the prime criteria by which the effectiveness of its treasury management activities will be measured. Accordingly, the analysis and reporting of treasury management activities will focus on their risk implications for the Council, and any financial instruments entered into to manage these risks.

The Council acknowledges that effective treasury management will provide support towards the achievement of its business and service objectives. It is therefore committed to the principles of achieving value for money in treasury management, and to employing suitable, comprehensive performance measurement techniques within the context of effective risk management.

- 7. Who initiated or wrote the Policy/Strategy/Plan/Public Service?** Finance
- 8. Who is responsible for the implementation of the Policy/Strategy/Plan/Public Service?** Capital Accountant
- 9. Is this policy affected by timetables established by other relevant Public Authorities?** Yes

# Equality

**1. Are there any Section 75 categories which might be expected to benefit from the intended policy?**

No

**2. Are there any factors which could contribute to/detract from the intended aim/outcome of the policy/decision?**

No

**3. Who are the internal/external stakeholders (actual or potential) that the policy will impact upon?**

Staff, Rate payers generally

**4. Is this policy associated with any other Council Policy (or Policies)?**

No

**5. Does this policy affect Internal or External users?**

Both

Evidence to help inform the Section 75 screening process may take many forms. Public authorities should ensure that their screening decision is informed by relevant data.

**6. What evidence/information (both qualitative and quantitative) have you gathered to inform this policy?**

All

<b>Religious belief evidence</b>	None, this is a technical policy required by law which is focussed on the management of the Council's cash balances.
<b>Political opinion evidence</b>	None, this is a technical policy required by law which is focussed on the management of the Council's cash balances.
<b>Racial group evidence</b>	None, this is a technical policy required by law which is focussed on the management of the Council's cash balances.
<b>Age evidence</b>	None, this is a technical policy required by law which is focussed on the management of the Council's cash balances.
<b>Marital status evidence</b>	None, this is a technical policy required by law which is focussed on the management of the Council's cash balances.
<b>Sexual orientation evidence</b>	None, this is a technical policy required by law which is focussed on the management of the Council's cash balances.
<b>Men and women generally evidence</b>	None, this is a technical policy required by law which is focussed on the management of the Council's cash balances.
<b>Disability evidence</b>	None, this is a technical policy required by law which is focussed on the management of the Council's cash balances.
<b>Dependants evidence</b>	None, this is a technical policy required by law which is focussed on the management of the Council's cash balances.

Taking into account the information referred to above, what are the different needs, experiences and priorities for each of the following categories, in relation to the particular policy / decision?

**7. Please provide details of different needs, experiences and priorities for each of the categories**

None, this is a technical policy required by law which is focussed on the management of the Council's cash balances.

**8. What is the likely impact on equality of opportunity for those affected by this policy, in relation to Religious belief?**

None

**9. What is the likely impact on equality of opportunity for those affected by this policy, in relation to Political opinion?**

None

**10. What is the likely impact on equality of opportunity for those affected by this policy, in relation to Racial group?**

None

**11. What is the likely impact on equality of opportunity for those affected by this policy, in relation to Age?**

None

**12. What is the likely impact on equality of opportunity for those affected by this policy, in relation to Marital status?**

None

**13. What is the likely impact on equality of opportunity for those affected by this policy, in relation to Sexual orientation?**

None

**14. What is the likely impact on equality of opportunity for those affected by this policy, in relation to Men and women generally?**

None

**15. What is the likely impact on equality of opportunity for those affected by this policy, in relation to Disability?**

None

**16. What is the likely impact on equality of opportunity for those affected by this policy, in relation to Dependants?**

None

**17. Are there opportunities to better promote equality of opportunity for people within the Section 75 equalities categories? If Yes, provide details. If No, provide reasons.**

<b>Religious belief</b>	None, this is a technical policy required by law which is focussed on the management of the Council's cash balances.
<b>Political opinion</b>	None, this is a technical policy required by law which is focussed on the management of the Council's cash balances.
<b>Racial group</b>	None, this is a technical policy required by law which is focussed on the management of the Council's cash balances.
<b>Age</b>	None, this is a technical policy required by law which is focussed on the management of the Council's cash balances.
<b>Marital Status</b>	None, this is a technical policy required by law which is focussed on the management of the Council's cash balances.
<b>Sexual orientation</b>	None, this is a technical policy required by law which is focussed on the management of the Council's cash balances.

**Men and women generally**

None, this is a technical policy required by law which is focussed on the management of the Council's cash balances.

**Disability**

None, this is a technical policy required by law which is focussed on the management of the Council's cash balances.

**Dependants**

None, this is a technical policy required by law which is focussed on the management of the Council's cash balances.

**18. To what extent is the policy likely to impact on good relations between people of different religious belief, political opinion and/or racial group?**

None

**19. Are there opportunities to better promote good relations between people of different religious belief, political opinion and/or racial group?**

No

**19a. Please provide your reasons below**

None, this is a technical policy required by law which is focussed on the management of the Council's cash balances.

**Disability Discrimination Order (NI) 2006****20. Is there evidence to suggest that this policy would promote positive attitudes towards people with a disability?**

No

**21. Is there evidence to suggest that this policy would encourage the participation of people with a disability in public life?**

No

**Additional Considerations****22. Are there any potential impacts of the policy / decision (positive or negative) on people with multiple identities?**

No

**Monitoring Arrangements****23. Outline what data you could collect in the future to monitor the impact of this policy / decision on equality, good relations and disability duties**

None, this is a technical policy required by law which is focussed on the management of the Council's cash balances.

**25. On the basis of the answers to the screening questions, I recommend that this policy/decision is**

Screened Out - No negative impacts

**Conclusion**

Technical policy with no screening implications and therefore no impact assessment is required.

**Please upload any supporting documents for review**

 Treasury Management Polic... .docx

**Email:**

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**Screening Panel Comments**

# Appendix - Religious Belief

## Religious belief (Internal)

\* Small numbers removed as individuals could be identifiable

	Catholic	Protestant & other Christian	Other religions	Total
<b>Males F/T</b>	33	388	34	425
	8%	84%	8%	100%
<b>Males P/T</b>	*	*	*	8
	25%	63%	13%	100%
<b>Females F/T</b>	58	223	6	287
	20%	78%	2%	100%
<b>Females P/T</b>	12	20	5	35
	32%	54%	14%	100%
<b>Total</b>	105	606	46	757
	14%	80%	6%	100%

## Religious belief (External)

The Northern Ireland Census 2011 (NISRA) statistics for the Borough area showed that 75% are or have been brought up in Protestant and Other Christian (including Christian related) religions. While this varied across the borough from 17% in Portaferry ward to 87% in Carrowdore ward this does not have any relation to this policy. These compared to 48% for Northern Ireland as a whole.

LGD	All usual residents	Catholic	Protestant & other Christian	Other religions	None
<b>Northern Ireland</b>	1,810,863	817,385	875,717	16,592	101,169
		-45.14%	-48.36%	-0.92%	-5.59%
<b>Ards and North Down</b>	156,672	20,550	117,589	1,729	16,804
		13%	75%	1%	11%

# Appendix - Political Opinion

## Political opinion (External)

Electoral Office data from recent Local Government elections detail the political representation on Ards and North Down Council, The Stormont Executive for this electoral area and Westminster election. This data is an approximate measure of political opinion of the voting electorate within the Borough. Turnout to vote in North Down and Strangford constituencies tend to be lower than the rest of NI suggesting less strong political opinions. Of those who do turn out, the results show preferences for voting Unionist parties.

Political Party	Seats Held
Alliance	10
DUP	14
Green	3
Independants	3
SDLP	1
Sinn Féin	0
TUV	1
UUP	8

## Appendix - Racial Group

### Racial group (Internal)

\* Small numbers removed as individuals could be identifiable

Racial Group	Total	Percentage
White	682	78.66%
Black	*	*
Chinese	*	*
Other	*	*
Did not want to answer	*	*
Left Black	176	20.30%

### Racial group (External)

NISRA, NINIS and Northern Ireland Strategic Migration Partnership data provide up to date data. The 2011 census showed that 32,000 (1.8%) of the usually resident population in Northern Ireland is from a minority ethnic background. Within the borough, the 2011 Census showed that 1.5% (2,300) were from a minority ethnic background. Across the borough this ranged from 5.2% in Loughview ward to 0.3% in Lisbane ward.

Total Usual Residents	156,672
White	154,365
Chinese	406
Irish Traveller	0
Indian	283
Pakistani	0
Bangladeshi	177
Other Asian	415
Black Caribbean	0
Black African	139
Black Other	132
Mixed	556
Other	199



## Appendix - Age

### Age (Internal)

Age Profile	Female	Female %	Male	Male %
16 to 29	20	6%	26	65%
30 to 39	75	23%	83	19%
40 to 49	105	33%	121	27%
50 to 59	80	25%	176	39%
65+	42	13%	41	9%
<b>Total</b>	<b>322</b>	<b>100%</b>	<b>447</b>	<b>100%</b>

### Age (External)

NISRA have published population projections for the Borough which show that the proportion of those aged 85 and over are expected to more than double within the next 25 years. ANDBC has the highest % population of older people in Northern Ireland.

Age Profile	Northern Ireland	Ards and North Down
0 to 15	385,200	29,801
16 to 39	583,116	43,239
40 to 64	591,481	54,094
65+	291,824	31,663

<b>Total</b>	1,851,621	158,797
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# Appendix - Marital Status

## Marital Status (Internal)

\* Small numbers removed as individuals could be identifiable

Marital Status	Total	Percentage
Single	180	20.76%
Married	405	46.71%
Divorced	35	4.04%
Co Habiting	14	1.61%
Separated	25	2.88%
Civil Partnership	*	*
Left Blank	207	23.88%

## Marital Status (External)

The 2011 Northern Ireland Census showed that 48% of adults (those aged over 16 years of age) in Northern Ireland were either married or in a registered same-sex civil partnership. Within the borough, 54% of adults fell into this category. This varies across the borough from 36% in Central (Ards) ward to 64% in Lisbane ward. See

Marital Status	Northern Ireland	Ards and North Down
All usual residents: Aged 16+ years	<b>1,431,540</b>	<b>126,945</b>
Single (never married or never registered a same-sex civil partnership): Aged 16+ years	<b>517,393</b>	<b>36,730</b>
	36.14%	29%
Married: Aged 16+ years	<b>680,831</b>	<b>67,866</b>
	47.56%	53%
In a registered same-sex civil partnership: Aged 16+ years	<b>1243</b>	<b>123</b>
	0.09%	0.09%
Separated (but still legally married or still legally in a same-sex civil partnership): Aged 16+ years	<b>56,911</b>	<b>4,328</b>
	3.98%	3%
Divorced or formerly in a same-sex civil partnership which is now legally dissolved:	<b>78,074</b>	<b>8,548</b>
	5.45%	7%
Widowed or surviving partner from a same-sex civil partnership: Aged 16+ years	<b>97,088</b>	<b>9,350</b>
	6.78%	7%

# Appendix - Sexual Orientation

## Sexual Orientation

It should be noted that no reliable data is available on sexual orientation-NISRA are currently examining methodology on how to measure this. However, the 2011 census indicates that less than 1% of the Northern Ireland adult population (those aged 16 years and over) were in a registered same-sex civil partnership. This was similar to the borough as a whole. The Continuous Household Survey in Northern Ireland estimated this figure between 0.9% and 1.9% in 2015-2016. The Office for National Statistics estimates a similar range for the United Kingdom (1.7%).

## Appendix - Men and Women Generally

### Men and women generally (Internal)

Male	Female	Total
511	356	867
58.94%	41.06%	100%

### Men and women generally (External)

According to census (NISRA) almost half of the population of Northern Ireland were male (49%) and this was similar throughout Ards and North Down Borough Council (48%).

LGD	Male	Female	Total
Northern Ireland	887,323	923,540	1,810,863
Ards and North Down	75,920	80,752	156,672

## Appendix - Disability

### Disability (External)

The 2011 Census (NISRA) showed that 20% of the population in Ards and North Down area had a health issue or disability (including those related to old age) which has lasted or expected to last at least 12 months. (This was similar to the Northern Ireland figure of 21%.)

<b>LGD</b>	<b>All usual residents</b>	<b>Long-term health problems or disability: Day-to-day activities limited a lot</b>	<b>Long-term health problems or disability: Day-to-day activities limited a little</b>	<b>Long-term health problems or disability: Day-to-day activities not limited</b>
<b>Northern Ireland</b>	1,810,863	215,232	159,414	1,436,217
<b>Ards and North Down</b>	156,672	16,696	14,808	187,141

## Appendix - Dependants

### Dependants (External)

In considering this dimension the following have been included: persons with responsibility for the care of a child, children, a person with a disability and or an older person. According to the Continuous Household Survey, 2013-2016, 37% of Ards and North Down claimed to have a dependent (This did not differentiate on the type of dependent).

According to the 2011 Census, 7,474 households in Ards and North Down had a dependent child under the age of 4 (This might give an indication on the numbers who would have buggies or prams).

	<b>All households</b>	<b>Dependent children in household: All ages</b>	<b>Dependent children in household: Aged 0-4 years</b>
<b>Northern Ireland</b>	703,275	238,904	96,030
<b>Ards and North Down</b>	156,672	19,520	7,474