

# Template for Stage 1




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## Equality Impact Assessment – screening.

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Name of Strategy/Policy Treasury Strategy Date of Assessment: 11/08/08

Is this a new or updated Policy? New  Updated

How is the Strategy/Policy finalised/adopted: Cabinet/Board  Delegated

Lead Officer conducting the assessment: Rebecca Smith Job Title: Assistant Head of Finance

Service area: Finance – Capital & Treasury Contact details: ext 8046

**Others involved in the assessment** *(this could include service users, front line officers, people with specialist knowledge or interest):*

Bev Dixon

**Identify what the activity is trying to achieve – why is the Strategy/Policy required** *(is there a statutory duty, how was the issue identified, who was the originator of the activity, etc).*

The Council has adopted the CIPFA Code of Treasury Management and it is a requirement under that Code of Practice

**Purpose of the Strategy/ Policy.** *(What does the activity involve e.g. In the case of Conservation, Identifies historic character, identifies methods to safeguard character, identifies areas for enhancement but this will not be the enhancement work itself, etc. Consider how the activity relates to the council's equality and diversity duties and priorities).*

The purpose of the Treasury Strategy is to establish the framework for the council's investment portfolio, balancing risk against reward in the best interests of stewardship of the public purse.

**Identify the main beneficiaries or people affected by the issue** *(who benefits or is affected - local residents and users of area, community at large, visitors to the town, contractors working in the area, people delivering the service etc).*

The main beneficiaries are the council tax and rent payers as a whole.

**What information exists already?**

CIPFA Treasury Management Code of Practice, CPA use of Resources KLoEs.

**Has any consultation been undertaken on this or related issue?**

No consultation is required, the format and content is broadly determined by the Code of Practice.

**Are any reports or other relevant documents available from our organisation or from partners or other sources?**

CIPFA Treasury Management Code of Practice, CPA use of Resources KLoEs

**Which parts of the activity have the potential for adverse impact or to discriminate unlawfully?** *(Factors or issues that could contribute to inequality, consider risks and opportunities).*

None

**Could a particular sector of the community be disadvantaged by the strategy/policy.**

Yes  No  (give details of any evidence you may have)

**If yes**, proceed to undertake an [Equality Impact Assessment](#) (EIA)

**If no**, then have this confirmed by the Corporate Equalities Steering Group representative for your area and signed off by your Service Head / Corporate Director/ Board. In the event of any queries, check with a member of the Policy team.

**Action points** (please make this SMART-state what/who/how/when)

Review EIA for 2008/09 Treasury Strategy

**I agree that this policy/strategy/function/activity should not proceed to a full Impact Assessment** (If appropriate, date equality impact assessment will commence)

**Confirmed by:** Gavin Chambers

**Signed by:** Gavin Chambers

**Please attach a copy of this screening to the document it relates** ✓

**Copy to be sent to Policy Team Leader at [policy@northampton.gov.uk](mailto:policy@northampton.gov.uk)** ✓