

Newry, Mourne and Down District Council Policy Screening Form

Policy Information

Name of the policy	Reserves Policy
Is this an existing, revised or new policy?	New
What is it trying to achieve (aims/outcomes)	<p>The Council shall maintain balances within reserves as required by the Code of Practice on Local Authority Accounting and shall maintain balances within its funds as it considers prudent bearing in mind the financial risks and opportunities to which it is exposed in line with CIPFA guidance.</p> <p>The purpose is to set the Council's policy in relation maintaining its financial reserves and funds to allow proper financial planning and ensure adequate financial resilience.</p> <p>In making decisions the Council will have regard to the reports presented by the Chief Financial Officer.</p> <p>In order to assess the adequacy of unallocated general reserves when setting the budget, Chief Financial Officer should take account of the strategic, operational and financial risks facing the authority.</p>
Are there any Section 75 categories which might be expected to benefit from the intended policy? If so, explain how.	No
Who initiated or wrote the policy?	Gerard Byrne, Assistant Director of Finance and Performance
Who owns and who implements the policy?	Gerard Byrne, Assistant Director of Finance and Performance

Implementation factors

	Yes	No
Are there any factors which could contribute to/detract from the intended aim/outcome of the policy/decision?	X	
If yes, are they Financial	X	
If yes, are they Legislative	X	
If yes, and they are Other please specify:		

Main stakeholders affected

Who are the internal and external stakeholders (actual or potential) that the policy will impact upon?

	Yes	No
Staff	X	
Service users	X	
Other public sector organisations		
Voluntary/community/trade unions		
Other, please specify:	Elected Members Residents / ratepayers - indirectly	

Other policies with a bearing on this policy

What are they	<p>The Local Government Finance Act (NI) 2011 provides the legal framework for Council reserves and funds as follows:</p> <p>Section 6 – Adequacy of reserves Section 7 – Controlled reserves Section 8 – General Fund Section 9 – Power to establish funds Section 10 – Limitations on use of funds</p> <p>CIPFA Bulletin 13 Local Authority Reserves and Balances provides guidance regarding the levels maintained in council reserves and funds.</p> <p>CIPFA Code of Practice on Local Authority Accounting in the United Kingdom (the Code) details the external accounting requirements for all reserves and funds.</p>
Who owns them	

Available evidence

What evidence/information (both qualitative and quantitative) have you gathered to inform this policy? Specify details for relevant Section 75 categories.

Section 75 Category	Details of needs/experiences/priorities																	
Religious belief	LGD	All usual residents	Catholic	Protestant and other Christian	Other religions	None												
	Northern Ireland	1,903,178	869,753 (45.7%)	827,545 (43.5%)	28,514 (1.5%)	177,360 (9.3%)												
	Newry, Mourne & Down	182,074	131,300 (72.1%)	39,970 (22.0%)	1,327 (0.7%)	9,477 (5.2%)												
	(Source: Census Data 2021).																	
Political opinion	<p>Elected political party representation is an approximate barometer of political opinion of people within the Council area.</p> <p>The party breakdown of the Council’s elected members is as follows:</p> <table><tr><td>Sinn Féin</td><td>20 seats</td></tr><tr><td>SDLP</td><td>8 seats</td></tr><tr><td>Independents</td><td>2 seats</td></tr><tr><td>Democratic Unionist</td><td>5 seats</td></tr><tr><td>Ulster Unionist</td><td>1 seats</td></tr><tr><td>Alliance</td><td>5 seats</td></tr></table> <p>Councillors are elected within seven District Electoral Areas (DEAs) across the Council area. With respect to party political representation, democratic deficits exist within particular DEAs i.e three DEAs have no PUL Councillor representation (Newry, Crotlieve and Downpatrick), two DEAs have one PUL (Slieve Croob and Slieve Gullion) Councillor and, one DEA has one CNR (Rowallane).</p> <p>This breakdown is taken as an approximate representation of the political opinion of the people resident within the Newry, Mourne and Down District Council area.</p>						Sinn Féin	20 seats	SDLP	8 seats	Independents	2 seats	Democratic Unionist	5 seats	Ulster Unionist	1 seats	Alliance	5 seats
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Racial group	According to the 2021 Census, 3.4% (65,604) of the usually resident population of Northern Ireland belongs to minority ethnic groups. This is almost double the proportion in 2011 (1.8%).																	

	<p>The minority ethnic language profile within the area serves as a possible indicator of the BME community profile. The composition of language groups in the Newry, Mourne and Down District Council area is noted by NISRA (2021) as follows:</p> <p>Minority Ethnic Language Profile of the Newry, Mourne and Down LGD Area</p> <table><tr><th>Main language of residents in Newry, Mourne and Down District LGD</th><th>Number</th><th>Percentage %</th></tr><tr><td>English</td><td>168,408</td><td>96.1</td></tr><tr><td>Polish</td><td>2,143</td><td>1.22</td></tr><tr><td>Lithuanian</td><td>1,149</td><td>0.66</td></tr><tr><td>Irish</td><td>553</td><td>0.32</td></tr><tr><td>Romanian</td><td>347</td><td>0.2</td></tr><tr><td>Portuguese</td><td>119</td><td>0.06</td></tr><tr><td>Arabic</td><td>170</td><td>0.09</td></tr><tr><td>Bulgarian</td><td>677</td><td>0.39</td></tr><tr><td>Chinese (not otherwise specified)</td><td>70</td><td>0.04</td></tr><tr><td>Slovak</td><td>98</td><td>0.05</td></tr><tr><td>Hungarian</td><td>106</td><td>0.06</td></tr><tr><td>Spanish</td><td>77</td><td>0.04</td></tr><tr><td>Latvian</td><td>279</td><td>0.15</td></tr><tr><td>Russian</td><td>180</td><td>0.10</td></tr><tr><td>Tetun</td><td>22</td><td>0.01</td></tr><tr><td>Malayalam</td><td>51</td><td>0.03</td></tr><tr><td>Tagalog/Filipino</td><td>44</td><td>0.03</td></tr><tr><td>Cantonese</td><td>38</td><td>0.02</td></tr><tr><td>Other languages</td><td>711</td><td>0.41</td></tr></table>	Main language of residents in Newry, Mourne and Down District LGD	Number	Percentage %	English	168,408	96.1	Polish	2,143	1.22	Lithuanian	1,149	0.66	Irish	553	0.32	Romanian	347	0.2	Portuguese	119	0.06	Arabic	170	0.09	Bulgarian	677	0.39	Chinese (not otherwise specified)	70	0.04	Slovak	98	0.05	Hungarian	106	0.06	Spanish	77	0.04	Latvian	279	0.15	Russian	180	0.10	Tetun	22	0.01	Malayalam	51	0.03	Tagalog/Filipino	44	0.03	Cantonese	38	0.02	Other languages	711	0.41
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Age	<p>According to the 2021 Census, the age profile of the Newry, Mourne and Down LGD is as follows:</p> <table><tr><th>Age Profile</th><th>NI</th><th>Newry, Mourne & Down</th></tr><tr><td>0-4</td><td>113,825</td><td>11,722</td></tr><tr><td>5-7</td><td>73,456</td><td>7,693</td></tr><tr><td>8-9</td><td>51,020</td><td>5,259</td></tr><tr><td>10-14</td><td>126,919</td><td>13,151</td></tr><tr><td>15</td><td>23,220</td><td>2,254</td></tr><tr><td>16-17</td><td>46,641</td><td>4,923</td></tr><tr><td>18-19</td><td>43,343</td><td>4,024</td></tr><tr><td>20-24</td><td>111,383</td><td>10,022</td></tr><tr><td>25-29</td><td>116,407</td><td>10,354</td></tr><tr><td>30-44</td><td>375,518</td><td>34,970</td></tr><tr><td>45-59</td><td>381,910</td><td>36,612</td></tr></table>	Age Profile	NI	Newry, Mourne & Down	0-4	113,825	11,722	5-7	73,456	7,693	8-9	51,020	5,259	10-14	126,919	13,151	15	23,220	2,254	16-17	46,641	4,923	18-19	43,343	4,024	20-24	111,383	10,022	25-29	116,407	10,354	30-44	375,518	34,970	45-59	381,910	36,612																								
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Marital status	<p>The table below provides an overview of the marital status profile of the Newry, Mourne and Down area:</p> <table><tr><th>Marital Status</th><th>Newry, Mourne and Down LGD</th><th>NI</th></tr><tr><td>All usual residents: Aged 16+ years</td><td>141,996</td><td>1,514,743</td></tr><tr><td>Single (never married or never registered a same-sex civil partnership) Aged 16+ years</td><td>52,128 (36.7%)</td><td>576,708 (38.1%)</td></tr><tr><td>Married: Aged 16+ years</td><td>68,076 (47.9%)</td><td>690,509 (45.6%)</td></tr><tr><td>In a registered same-sex civil partnership: Aged 16+ years</td><td>201 (0.14%)</td><td>2,742 (0.19%)</td></tr><tr><td>Separated (but still legally married or still legally in a same-sex civil partnership): Aged 16+ years</td><td>4,975 (3.5%)</td><td>57,272 (3.8%)</td></tr><tr><td>Divorced or formerly in a same-sex civil partnership which is now legally dissolved</td><td>7,704 (5.4%)</td><td>91,128 (6.0%)</td></tr><tr><td>Widowed or surviving partner from a same-sex civil partnership: Aged 16+ years</td><td>8,912 (6.3%)</td><td>96,384 (6.4%)</td></tr></table> <p>Census 2021</p>	Marital Status	Newry, Mourne and Down LGD	NI	All usual residents: Aged 16+ years	141,996	1,514,743	Single (never married or never registered a same-sex civil partnership) Aged 16+ years	52,128 (36.7%)	576,708 (38.1%)	Married: Aged 16+ years	68,076 (47.9%)	690,509 (45.6%)	In a registered same-sex civil partnership: Aged 16+ years	201 (0.14%)	2,742 (0.19%)	Separated (but still legally married or still legally in a same-sex civil partnership): Aged 16+ years	4,975 (3.5%)	57,272 (3.8%)	Divorced or formerly in a same-sex civil partnership which is now legally dissolved	7,704 (5.4%)	91,128 (6.0%)	Widowed or surviving partner from a same-sex civil partnership: Aged 16+ years	8,912 (6.3%)	96,384 (6.4%)
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Sexual orientation	<p>Analysis of the Census 2021 indicates that between 2% and 10% of the population may be lesbian, gay or bisexual.</p> <p>There are no official statistics in relation to the number of gay, lesbian or bisexual people in Northern Ireland. However, research conducted by the HM Treasury shows that between 5% - 7% of the UK population identify themselves as gay, lesbian, bisexual or ‘trans’ (transsexual,</p>																								

	<p>transgendered and transvestite) (LGBT). This is a sizeable proportion of the population here in Northern Ireland.</p> <p>There is no qualitative or quantitative data available to suggest the policy would have an adverse impact for people of different sexual orientation.</p>															
Men and women generally	<p>The gender profile for the Newry, Mourne and Down LGD is as follows:</p> <table><tr><th>LGD</th><th>Male</th><th>Female</th></tr><tr><td>Northern Ireland</td><td>936,132</td><td>967,043</td></tr><tr><td>Newry, Mourne and Down LGD</td><td>90,063</td><td>92,011</td></tr></table> <p>Census 2021</p>	LGD	Male	Female	Northern Ireland	936,132	967,043	Newry, Mourne and Down LGD	90,063	92,011						
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Disability	<p>According to the 2021 Census 22.88% of people in the Newry, Mourne and Down District Council area has a long-term health problem or disability that limits their day-to-day activities.</p> <table><tr><th>LGD</th><th>All usual residents</th><th>Long-term health problem or disability: Day-to-day activities limited a lot</th><th>Long-term health problem or disability: Day-to-day activities limited a little</th><th>Long-term health problem or disability: Day-to-day activities not limited</th></tr><tr><td>Northern Ireland</td><td>1,903,179</td><td>217,964 (11.45%)</td><td>245,057 (12.88%)</td><td>1,440,158 (75.67%)</td></tr><tr><td>Newry, Mourne and Down</td><td>182,074</td><td>19,789 (10.87%)</td><td>21,868 (12.01%)</td><td>140,417 (77.13%)</td></tr></table> <p>In Northern Ireland the profile of people with a disability is cited as follows:</p> <ul style="list-style-type: none">• More than 1 in 5 or 21% of the population in Northern Ireland has a disability The incidence of disability is higher in Northern Ireland than any other part of the UK• 1 in 7 people in Northern Ireland have some form of hearing loss• 5,000 sign language users who use British Sign Language (BSL) and/or Irish Sigh Language (ISL)• In Northern Ireland there are 57,000 blind people or people with significant visual impairment• 52,000 people with learning disabilities	LGD	All usual residents	Long-term health problem or disability: Day-to-day activities limited a lot	Long-term health problem or disability: Day-to-day activities limited a little	Long-term health problem or disability: Day-to-day activities not limited	Northern Ireland	1,903,179	217,964 (11.45%)	245,057 (12.88%)	1,440,158 (75.67%)	Newry, Mourne and Down	182,074	19,789 (10.87%)	21,868 (12.01%)	140,417 (77.13%)
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	(Source: Disability Action)
Dependants	<p>Persons with dependents may be people who have personal responsibility for the care of a child (or children), a person with a disability, and / or a dependent older person.</p> <p>According to the Census 2021, there are 68,396 households in Newry, Mourne and Down, 33.9% of which have dependent children. With regard to these figures, dependents are defined as those aged 0-15 years or those aged 16-18 years who are in full-time education and living with their parents or grandparents. Similar to the regional trend, the proportion of households with dependents in the District has declined from 50% in 1981 to 33.9% in 2021.</p> <p>There are 5,639 lone parent households with dependent children in Newry, Mourne and Down which equates to just over 8% of number of total households in the District and is the fourth highest in Northern Ireland, after Belfast (17,292), Derry and Strabane (7,639) and Armagh, Banbridge and Craigavon (6,556). Half of the parents in lone parent households in Newry, Mourne and Down are unemployed, almost a quarter are in full time employment and over a quarter are in part time employment. 93% of the parents in lone parent households in the District are female compared to 11% who are male.</p> <p>In 2019-21, the teenage birth rate (under 20 years old) was 6.5 per 1,000 mothers, which is the fourth highest in Northern Ireland after Belfast (11.4); Antrim & Newtownabbey (6.9) and Mid and East Antrim (6.8) but below the regional average of 6.8 per 1,000 births.</p>

Needs, experiences and priorities

Taking into account the information referred to above, what are the different needs, experiences and priorities of each of the following categories, in relation to the particular policy/decision? Specify details for each of the Section 75 categories.

Section 75 Category	Details of needs/experiences/priorities
Religious belief	No specific needs, experiences or priorities have been identified in relation to the Reserves Policy.
Political opinion	No specific needs, experiences or priorities have been identified in relation to the Reserves Policy.
Racial group	No specific needs, experiences or priorities have been identified in relation to the Reserves Policy.
Age	No specific needs, experiences or priorities have been identified in relation to the Reserves Policy.
Marital status	No specific needs, experiences or priorities have been identified in relation to the Reserves Policy.
Sexual orientation	No specific needs, experiences or priorities have been identified in relation to the Reserves Policy.
Men and women generally	No specific needs, experiences or priorities have been identified in relation to the Reserves Policy.
Disability	No specific needs, experiences or priorities have been identified in relation to the Reserves Policy.
Dependants	No specific needs, experiences or priorities have been identified in relation to the Reserves Policy.

Screening Questions

1. What is the likely impact on equality of opportunity for those affected by this policy, for each of the Section 75 grounds?

Section 75 category	Details of policy impact	Level of impact? Major/minor/none
Religious belief	No adverse policy impact identified.	None
Political opinion	No adverse policy impact identified.	None
Racial group	No adverse policy impact identified.	None
Age	No adverse policy impact identified.	None
Marital status	No adverse policy impact identified.	None
Sexual orientation	No adverse policy impact identified.	None
Men and women generally	No adverse policy impact identified.	None
Disability	No adverse policy impact identified.	None
Dependants	No adverse policy impact identified.	None

2. Are there opportunities to better promote equality of opportunity for people within the Section 75 equality categories?

Section 75 category	If Yes, provide details	If No, provide details
Religious belief		No
Political opinion		No
Racial group		No
Age		No
Marital status		No
Sexual orientation		No
Men and women generally		No

Disability		No
Dependants		No

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

Good relations category	Details of policy impact	Level of impact? Major/minor/none
Religious belief	No adverse policy impact identified.	None
Political opinion	No adverse policy impact identified.	None
Racial group	No adverse policy impact identified.	None

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

Good relations category	If Yes , provide details	If No , provide details
Religious belief		No
Political opinion		No
Racial group		No

Additional considerations

Multiple identity

Generally speaking, people can fall into more than one Section 75 category. Taking this into consideration, are there any potential impacts of the policy/decision on people with multiple identities? (For example; disabled minority ethnic people; disabled women; young Protestant men; and young lesbians, gay and bisexual people).

None

Screening Decision

In light of your answers to the previous questions, do you feel that the policy should (please underline one):

1. **Not be subject to an EQIA (with no mitigating measures required)**
2. Not be subject to an EQIA (with mitigating measures /alternative policies)
3. Be subject to an EQIA

If 1. or 2. (i.e. not be subject to an EQIA), please provide details of the reasons why:

It is recommended not to proceed with conducting an equality impact assessment (with no mitigating measures required). This decision is based upon consideration of the intention of the policy statement, aim and scope.

No specific needs, experiences or priorities have been identified in relation to the Reserves Policy. No adverse policy impact identified.

If 2. (i.e. not be subject to an EQIA), in what ways can identified adverse impacts attaching to the policy be mitigated or an alternative policy be introduced?

In light of these revisions, is there a need to re-screen the revised/alternative policy? Yes / No. If No, please explain why

If 3. (i.e. to conduct an EQIA), please provide details of the reasons:

Timetabling and prioritising EQIA

If 3. is the policy affected by timetables established by other relevant public authorities? NO

If YES, please provide details:

Please answer the following questions to determine priority for timetabling the EQIA. On a scale of 1-3, with 1 being the lowest priority and 3 being the highest, assess the policy in terms of its priority for EQIA.

Priority criterion	Rating (1-3)
Effect on equality of opportunity and good relations	
Social need	
Effect on people's daily lives	

Relevance to a public authority's functions	
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Note: The Total Rating Score should be used to prioritise the policy in rank order with other policies screened in for EQIA. This list of priorities will assist you in timetabling the EQIA. Details of your EQIA timetable should be included in the quarterly Section 75 report.

Proposed date for commencing EQIA: _____

Monitoring

Effective monitoring will help identify any future adverse impacts arising from the policy which may lead you to conduct an EQIA, as well as help with future planning and policy development.

Please detail proposed monitoring arrangements below:

The policy will be reviewed in line with the Council's agreed policy review cycle i.e. every 4 years (as per Council's Equality Scheme commitment 4.31), or sooner to ensure it remains reflective of legislative developments.

The associated procedure sets out the principles used to assess the adequacy of reserves. In order to assess the adequacy of unallocated general reserves when setting the budget, The Chief Finance Officer should take account of the strategic, operational and financial risks facing the authority.

Approval and Authorisation

Screened by:	Position/Job Title	Date
Colin Moffett	Head of Corporate Policy	6 August 2025
Approved by:		
Gerard Byrne	Assistant Director of Finance and Performance	6 August 2025

Note: The completed policy screening template, signed off by the appropriate policy lead within the Council, and approved by the senior manager responsible for the policy, should be forwarded to the Head of Corporate Policy who will arrange for it to be included in the Council's Quarterly Report on Screening and made available on the Council's website.