

Equality Screening Template

Part 1: Policy Scoping

The first stage of the screening process involves scoping the policy under consideration. The purpose of policy scoping is to help prepare the background and context and set out the aims and objectives for the policy being screened. At this stage, scoping the policy will help identify potential constraints as well as opportunities.

Information about the policy

Name of the policy: CCEA Staff Expenses Policy
Is this an existing, revised or a new policy? Revised. Existing policy only required minimal change/updates to ensure staff have clear guidance.
What is it trying to achieve? (intended aims/outcomes) The purpose of this policy is to ensure that CCEA staff have appropriate guidance to claim expenses wholly, exclusively and necessarily incurred in undertaking their work in the employment of CCEA.
Are there any Section 75 categories which might be expected to benefit from the intended policy? If so, explain how. The policy applies to all categories.
Who initiated or wrote the policy? Financial Services
Who owns and who implements the policy? Financial Services

Implementation factors

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

If yes, are they:

Financial

Legislative

Other, please specify

NJC notes and Guidelines

Main stakeholders affected

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

Staff

Service users

Other public sector organisations

Voluntary/community/trade unions

Other, please specify

Other policies with a bearing on this policy

What are they? Travelling and Accommodation Policy, Gifts and Hospitality Policy, Code of Ethics, Eye and Eyesight Test Policy

Who owns them?
Financial Services

Available evidence

What evidence/information (both qualitative and quantitative) have you gathered to inform this policy? Please specify details for each of the Section 75 categories.

NJC Guidelines and HM Revenue Guidelines were used to inform this policy and are relevant to all categories.

Section 75 category	Details of evidence/information
Religious Belief	No issues raised within CCEA to date.
Political Opinion	No issues raised within CCEA to date.
Racial Group	No issues raised within CCEA to date.
Age	No issues raised within CCEA to date.
Marital Status	No issues raised within CCEA to date.
Sexual Orientation	No issues raised within CCEA to date.
Men and Women generally	No issues raised within CCEA to date.
Disability	No issues raised within CCEA to date.
Dependants	No issues raised within CCEA to date.

Needs, experiences and priorities

Taking into account the information referred to previously, are there different needs, experiences and priorities of each of the following categories, in relation to the particular policy/decision? Please specify details as appropriate for each of the Section 75 categories.

Section 75 category	Yes/No/Not sure	If yes, please provide details of needs/experiences/priorities
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	

Part 2: Screening Questions

1. What is the likely impact on equality of opportunity for those affected by this policy, for each of the Section 75 equality categories (minor/major/none)?		
Section 75 category	Details of policy impact	Level of impact? Minor/major/none
Religious belief	None	None
Political opinion	None	None
Racial group	None	None
Age	None	
Marital status	None	None
Sexual orientation	None	None
Men and women generally	None	None
Disability	None	None
Dependents	None	None

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

Section 75 category	Is <u>Yes</u> , provide details	If <u>No</u> , provide reasons
Religious belief	If necessary, there is the potential to pay claims more frequently than monthly. This will assist individuals with being 'out of pocket'.	
Political opinion		
Racial group		
Age		
Marital status		
Sexual orientation		
Men and women generally		
Disability		
Dependents		

3. To what extent is the policy likely to impact on good relations between people of different religious belief, political opinion or racial group (minor/major/none)?		
Good relations category	Details of policy impact	Level of impact minor/major/none
Religious belief	Policy applies to all.	None
Political opinion	Policy applies to all.	None
Racial group	Policy applies to all.	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 <u>Yes</u>, provide details	If <u>No</u>, provide reasons
Religious belief		No. Policy applies to all.
Political opinion		No. Policy applies to all.
Racial group		No. Policy applies to all.

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? **Yes** **No**
(For example: disabled minority ethnic people; disabled women; young Protestant men; and young lesbians, gay and bisexual people).

If yes, please provide details of data on the impact of the policy on people with multiple identities. Specify relevant Section 75 categories concerned.

None.

Part 3: Screening decision

Decision	Please select as appropriate
The policy has been 'screened in' for equality impact assessment.	<input type="checkbox"/>
The policy has been 'screened out' for equality impact assessment.	<input checked="" type="checkbox"/>
If the decision is to subject the policy to an equality impact assessment, please provide details of the reasons.	
If the decision is not to conduct an equality impact assessment, please provide details of the reasons.	
Taking into account the answers to the screen questions ie level of impact none in respect of all the categories, it has been concluded that there is no need to carry out an equality impact assessment.	

Mitigation

If the decision is not to conduct an equality impact assessment you may consider mitigation to lessen the severity of any equality impact, or the introduction of an alternative policy to better promote equality of opportunity or good relations.

Can the policy/decision be amended or changed or an alternative policy introduced to better promote equality or opportunity and/or good relations?	Yes	No
		<input checked="" type="checkbox"/>
If yes, give the reasons to support your decision, together with the proposed changes/amendments or alternative policy.		
If necessary, there is the potential to pay claims more frequently than monthly. This will assist individuals with being 'out of pocket'. This will be considered on a 'case by case'. This will be monitored.		

Timetabling and prioritising

If the policy has been 'screened in' for equality impact assessment, then please answer the following questions to determine its priority for timetabling the equality impact assessment.

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 equality impact assessment.

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

The total rating score will be used to prioritise the policy in rank order with other policies screened in for equality impact assessment. This list of priorities will assist CCEA in timetabling.

Part 4: Monitoring

Where a policy has been amended or an alternative policy introduced, effective monitoring will help you identify any future adverse impact arising from the policy, which may lead to carrying out an equality impact assessment, as well as helping with future planning and policy development.

Part 5: Approval and authorisation

Screened by	Position and Department
John Daly	Business Manager, Financial Services
Maureen McKay	Senior HR Advisor, PSE
Emma Stinson	HR Advisor, PSE

Approved by:	John Daly
Position:	Business Manager
Date:	1 st September 2011

