**Equality Screening Form**

**INTRODUCTION**

The information contained in this Equality Screening Form has been extracted from the Equality Commission for Northern Ireland’s Guide for Public Authorities (2010). Additional information about the 5 parts of the form and a flowchart to demonstrate the process of completion is detailed in [**Appendix 1**](#Appendix1) of the form.

This template document and further guidance can be found by clicking the following link - [www.equalityni.org/S75duties](https://www.equalityni.org/S75duties)

**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 and will help the policy maker work through the screening process on a step by step basis.

Public authorities should remember that the Section 75 statutory duties apply to internal policies (relating to people who work for the authority), as well as external policies (relating to those who are, or could be, served by the authority).

**Information about the policy**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Name of Policy** | Hybrid Working Policy | | | | | |
| **Is it existing, revised or a new policy?** | Existing |  | New |  | Revised |  |
| **If revised, please outline main updates:** |  | | | | | |
| **What is it trying to achieve?**  **(Intended aims/outcomes)** | To advise staff who had an option of working from home during the Covid-19 pandemic of how hybrid working will operate for the term of the policy | | | | | |
| **Are there any Section 75 categories which might be expected to benefit from the intended policy? If so, explain how.** |  | | | | | |
| **Who initiated or wrote the policy?** | Head of Reward & HR Services | | | | | |
| **Who owns and who implements the policy?** | Human Resources | | | | | |

**Implementation Factors**

|  |  |  |  |
| --- | --- | --- | --- |
| Yes |  | No |  |

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

If yes, are they: (Select all applicable)

|  |  |
| --- | --- |
|  | Financial |
|  | Legislative |
|  | Other – please specify: |  |

**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](#Onefour) (please list):

|  |
| --- |
|  |

**Available Evidence**

Evidence to help inform the screening process may take many forms. Public authorities should ensure that their screening decision is informed by relevant data. The following document should help you source data - [Section 75 - Evidence Signposting Guide](https://www.equalityni.org/ECNI/media/ECNI/Publications/Employers%20and%20Service%20Providers/Public%20Authorities/S75DataSignpostingGuide.pdf)

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

|  |  |
| --- | --- |
| **Section 75 category** | **Details of evidence/information** |
| Religious belief | **Internal data from fair employment monitoring for employees** (4221) shows the breakdown of religious belief:   |  |  |  | | --- | --- | --- | | Protestant | Roman Catholic | Other | | 2241 | 1861 | 119 | | 53.1% | 44% | 2.9% | |
| Political opinion | There is no data captured regarding political opinion, and often religious belief would be taken as proxy for this category |
| Racial group | Internal data from fair employment monitoring shows the following figures regarding racial groups of employees:   |  |  |  |  |  | | --- | --- | --- | --- | --- | | White | Indian | Black African/  Mixed Ethnic | Prefer not to say | Unknown | | 4077 | 1 | 27 | 6 | 111 | | 96% | <1% | <1% | <1% | 3% |   NI Census 2011: <https://www.nisra.gov.uk/sites/nisra.gov.uk/files/publications/2011-census-results-key-statistics-northern-ireland-report-11-december-2012.pdf>  The census data shows that 98% of the NI population is considered to be of white ethnicity, with all other racial groups at less than 1% of the population. (2021 census data does not specify population count of various ethnic groups) |
| Age | **Internal Fair employment monitoring** data shows the following approximate figures for age groups of Translink employees (4221):   |  |  |  |  |  | | --- | --- | --- | --- | --- | | 16-24 | 25-34 | 35-44 | 45-54 | 55+ | | 113 | 533 | 1009 | 1287 | 1278 | | 2.7% | 12.6% | 23.9% | 30.5% | 30.3% | |  |  |  |  |  | |
| Marital status | **Internal Fair employment monitoring** data shows the following approximate figures for marital status of Translink employees (4221):  It should be noted this is not a mandatory question and this record is taken from start of employment, thus the status could change during employment with no requirement to inform/update HR or the system.   |  |  |  |  |  | | --- | --- | --- | --- | --- | | Married/ Civil Partnered | Co-Habiting | Single (Never married) | Other | No Answer | | 759 | 223 | 879 | 83 | 2277 | | 18% | 5% | 21% | 2% | 54% | |
| Sexual orientation | **Internal Fair employment monitoring** data shows the following approximate figures for sexual orientation of Translink employees (4221):  It should be noted this is not a mandatory question.   |  |  |  |  | | --- | --- | --- | --- | | A different sex | Same sex | Both | No Answer | | 1651 | 70 | 8 | 2492 | | 39% | 2% | <1% | 59% |   2021 NI Consensus results show the NI population breakdown for sexual orientation as:  [Census 2021 Main statistics for Northern Ireland (Phase 3) report (nisra.gov.uk)](https://www.nisra.gov.uk/system/files/statistics/census-2021-main-statistics-for-northern-ireland-phase-3-report.pdf)   |  |  |  | | --- | --- | --- | | Heterosexual | LGB+ | Prefer not to say | | 90.04% | 2.09% | 7.87% |   Data from Office for National Statistics shows that in Northern Ireland, the percentage of people identifying themselves as LGB in 2018 was 1.2%. [https://www.ons.gov.uk/peoplepopulationandcommunity](https://www.ons.gov.uk/peoplepopulationandcommunity/culturalidentity/sexuality/bulletins/sexualidentityuk/2018) |
| Men and women generally | **Internal Fair employment monitoring** data shows the following breakdown by gender for employees:   |  |  | | --- | --- | | Male | Female | | 3605 | 616 | | 85% | 15% |   Information from the Equality Commission NI about previous legal cases (in which the equality commission may have provided support) involving sex discrimination shows 8 cases – In 7 of these the claimant was female.  Data from the 2021 NI Census notes hours of employment by sex. These figures show:   |  |  | | --- | --- | | Females (Over 16) in part-time employment 0-30 hours per week | Males (over 16) in part-time employment 0-30 hours per week | | 183,225 | 79,501 |   Internal data shows 105 employees are ‘part time’ in Translink (Not including part time term time or job shares). This equals 2.4% of the Translink workforce  Approximately 39 of these part time workers would work under the Hybrid Working Policy. The remaining numbers are frontline operational staff who would be required to work onsite during any normal working patterns.  Of these 39, only 4 are male – meaning 35 are female, working part-time in a part of the business that would be expected to be affected by the Hybrid Working Policy. |
| Disability | **Internal Fair employment monitoring** data shows the following breakdown of employees who have declared whether or not they have a disability:   |  |  |  | | --- | --- | --- | | No Disability | Disability | No Answer | | 747 | 75 | 2842 | | 17.7% | 1.78% | 67.3% |   Procedure has a section on The Employment of People with Disabilities  Data from Office of National Statistics which details that NI had an employment rate for disabled people of 37. [https://www.ons.gov.uk/peoplepopulationandcommunity/healthandsocialcare/](https://www.ons.gov.uk/peoplepopulationandcommunity/healthandsocialcare/disability/bulletins/disabilityandemploymentuk/2019) |
| Dependants | **Internal Fair employment monitoring** data shows the following approximate breakdown of employees who have declared whether or not they have dependants:  It should be noted this is not a mandatory question and this record is taken from start of employment, thus the status could change during employment with no requirement to inform/update HR or the system.   |  |  |  | | --- | --- | --- | | Yes | No | No Answer | | 811 | 484 | 2947 | | 19% | 11% | 70% | |

**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 | There is nothing within the Hybrid Working policy expected to affect any employee based on religious belief. The policy applies to all relevant employees and with the internal monitoring data showing a reasonably equal split between the 2 main religious groups in NI, there is no reason to believe it would have any impact. |
| Political opinion | Political opinion has no evidence, but religious belief would typically be taken by proxy of political opinion. |
| Racial group | There is nothing within the Hybrid working policy believed to affect any racial group. The data above shows ‘white’ as the majority racial group amongst Translink employees and the NI population, but the policy is applicable regardless of racial group. |
| Age | There is nothing within the Hybrid working Policy believed to have an impact on any employee due to their age. The data above shows 60% of employees are over the age of 45, but no evidence to correlate this with the Hybrid Working Policy. |
| Marital status | There is nothing within the Hybrid Working Policy to have an impact on anyone due to their marital status. |
| Sexual orientation | There is nothing within the Hybrid Working Policy to have an impact on anyone due to their sexual orientation. The data above shows the majority of Translink employees have identified themselves as heterosexual, and therefore this group is likely to be impacted mostly by the policy, however, that is not due to the policy content. |
| Men and women generally | The data above shows that women more commonly work in a part time role compared to men generally across NI, and that this statistic is reflected in the working hours of Translink female employees working in environments that would have the Hybrid Working Policy applied. This is significant as the policy stipulates a minimum number of days worked at the designated work location, rather than a percentage of working hours, and therefore may have an indirect impact on those working part time as they are required to work a higher percentage of their working hours in the office, compared to those working full time hours – and that the data shows this indirectly impacts more women than men. |
| Disability | Disability is directly covered in the policy only to reference line manager’s responsibilities to apply reasonable adjustments as required for those with disability. It does note requirement of risk assessments such Display Screen Equipment to ensure that employees have the right equipment and working environment to be able to work from home in the same way they do from their Translink work location. The policy may impact favourably on someone with a disability as hybrid working is an additional option for them to consider as a reasonable adjustment if their role permits it as an option. |
| Dependants | The Hybrid Working Policy does stipulate that employees must not have responsibility for childcare during working hours. Whilst this would seem to act against those with child dependants, this would be commonly expected and alternative childcare arrangements would be required to be in place when working at their Translink location. The policy is simply clarifying that this should make no difference for home working. |

**PART 2 - SCREENING QUESTIONS**

**Introduction**

In making a decision as to whether or not there is a need to carry out an equality impact assessment, the public authority should consider its answers to the questions 1-4 which are given on pages 66-68 of the Guide: [Guide for Public Authorities April 2010](https://www.equalityni.org/ECNI/media/ECNI/Publications/Employers%20and%20Service%20Providers/S75GuideforPublicAuthoritiesApril2010.pdf)

Taking into account the evidence presented above, consider and comment on the likely impact on equality of opportunity and good relations for those affected by this policy, in any way, for each of the equality and good relations categories, by applying the screening questions given overleaf and indicate the level of impact on the group i.e. minor, major or none.

**Impact: Major / Minor / None**

If the public authority’s conclusion is **major** in respect of one or more of the Section 75 equality of opportunity and/or good relations categories, then consideration should be given to subjecting the policy to the equality impact assessment procedure.

**In favour of ‘MAJOR’ impact**

|  |  |
| --- | --- |
| **A** | The policy is significant in terms of its strategic importance; |
| **B** | Potential equality impacts are unknown, because, for example, there is insufficient data upon which to make an assessment or because they are complex, and it would be appropriate to conduct an equality impact assessment in order to better assess them; |
| **C** | Potential equality and/or good relations impacts are likely to be adverse or are likely to be experienced disproportionately by groups of people including those who are marginalised or disadvantaged; |
| **D** | Further assessment offers a valuable way to examine the evidence and develop recommendations in respect of a policy about which there are concerns amongst affected individuals and representative groups, for example in respect of multiple identities; |
| **E** | The policy is likely to be challenged by way of judicial review; |
| **F** | The policy is significant in terms of expenditure. |

If the public authority’s conclusion is **minor** in respect of one or more of the Section 75 equality categories and/or good relations categories, then consideration should still be given to proceeding with an equality impact assessment, or to:

* Measures to mitigate the adverse impact; or
* The introduction of an alternative policy to better promote equality of opportunity and/or good relations.

**In favour of ‘MINOR’ impact**

|  |  |
| --- | --- |
| **A** | The policy is not unlawfully discriminatory and any residual potential impacts on people are judged to be negligible; |
| **B** | The policy, or certain proposals within it, are potentially unlawfully discriminatory, but this possibility can readily and easily be eliminated by making appropriate changes to the policy or by adopting appropriate mitigating measures; |
| **C** | Any asymmetrical equality impacts caused by the policy are intentional because they are specifically designed to promote equality of opportunity for particular groups of disadvantaged people; |
| **D** | By amending the policy there are better opportunities to better promote equality of opportunity and/or good relations. |

If the public authority’s conclusion is **none** in respect of all of the Section 75 equality of opportunity and/or good relations categories, then the public authority may decide to screen the policy out. If a policy is ‘screened out’ as having no relevance to equality of opportunity or good relations, a public authority should give details of the reasons for the decision taken.

**In favour of ‘NONE’**

|  |  |
| --- | --- |
| **A** | The policy has no relevance to equality of opportunity or good relations. |
| **B** | The policy is purely technical in nature and will have no bearing in terms of its likely impact on equality of opportunity or good relations for people within the equality and good relations categories. |

**Screening Questions 1 - 4**

|  |  |  |
| --- | --- | --- |
| **Screening Question 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 | There is nothing within the Hybrid Working Policy to impact on anyone’s religious beliefs in applying the policy. | None |
| Political opinion | There is nothing within the Hybrid Working Policy to impact on anyone’s political opinion in applying the policy. | None |
| Racial group | There is nothing within the Hybrid Working Policy to impact on anyone’s racial group in applying the policy. | None |
| Age | There is nothing within the policy to impact anyone due to their age. The policy can be equally applied to all ages. | None |
| Marital status | There is nothing within the Hybrid Working Policy to impact on anyone’s marital status in applying the policy. | None |
| Sexual orientation | There is nothing within the Hybrid Working Policy to impact on anyone’s sexual orientation in applying the policy. | None |
| Men and women generally | Whilst the data above indicates a potential equality imbalance in this policy between men and women generally, there is nothing to indicate the policy should have any impact on equality of opportunity or good relations between men and women. The policy itself is discretionary and therefore may not be applied by all areas, and where it is applied, the basis of the policy would be considered an employment enhancement. | None |
| Disability | Disability legislation will supersede the Hybrid working Policy when appropriate and therefore the Hybrid Working Policy has no impact on those with a disability and clarifies that reasonable adjustments should still be applied in circumstances of hybrid working. | None |
| Dependants | There is nothing within the Hybrid Working Policy to negatively impact on those with dependants, as the policy does not change expectations of being able to focus on Translink work during working hours, whilst working at home, compared to working at the normal Translink location. It could be a benefit to those with dependants as they are potentially closer to home to deal with any emergency situations that might arise or spend more time with family as no need to commute to work. | None |

|  |  |  |
| --- | --- | --- |
| **Screening Question** **2** | | |
| Are there opportunities to better promote equality of opportunity for people within the Section 75 equalities categories? | | |
| Section 75 category | If **Yes**, provide details | If **No**, provide reasons |
| Religious belief |  | No, as the policy has no impact on this category group. |
| Political opinion |  | No, as the policy has no impact on this category group. |
| Racial group |  | No, as the policy has no impact on this category group. |
| Age |  | No, as the policy has no impact on this category group. |
| Marital status |  | No, as the policy has no impact on this category group. |
| Sexual orientation |  | No, as the policy has no impact on this category group. |
| Men and women generally |  | No, as the policy has no impact on this category group. |
| Disability |  | No, as the policy has no impact on this category group. |
| Dependants |  | No, as the policy has no impact on this category group. |

|  |  |  |
| --- | --- | --- |
| **Screening Question** **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 | There is nothing within the Hybrid Working Policy to impact on anyone’s religious beliefs in applying the policy. | None |
| Political opinion | There is nothing within the Hybrid Working Policy to impact on anyone’s political opinion in applying the policy. | None |
| Racial group | There is nothing within the Hybrid Working Policy to impact on anyone’s racial group in applying the policy. | None |

|  |  |  |
| --- | --- | --- |
| **Screening Question 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 reasons |
| Religious belief |  | No, as the policy has no impact on this category group. |
| Political opinion |  | No, as the policy has no impact on this category group. |
| Racial group |  | No, as the policy has no impact on this category group. |

**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).

|  |
| --- |
| No multiple identity categories identified |

Provide details of data on the impact of the policy on people with multiple identities. Specify relevant Section 75 categories concerned.

|  |
| --- |
| N/A |

**PART 3 - SCREENING DECISION**

If the decision is **not** to conduct an **equality impact assessment**, please provide details of the reasons.

|  |
| --- |
| Little or no impact on all categories, therefore equality impact assessment not required |

If the decision is not to conduct an equality impact assessment the public authority should consider if the policy should be **mitigated or an alternative policy be introduced**.

|  |
| --- |
|  |

If the decision **is to** subject the policy to an **equality impact assessment**, please provide details of the reasons.

|  |
| --- |
|  |

All public authorities’ equality schemes must state the authority’s arrangements for assessing and consulting on the likely impact of policies adopted or proposed to be adopted by the authority on the promotion of equality of opportunity. The Commission recommends screening and equality impact assessment as the tools to be utilised for such assessments. Further advice on equality impact assessment may be found in a separate Commission publication: Practical Guidance on Equality Impact Assessment.

**Mitigation**

When the public authority concludes that the likely impact is ‘minor’ and an equality impact assessment is not to be conducted, the public authority 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 of opportunity and/or good relations?

If so, give the **reasons** to support your decision, together with the proposed changes/amendments or alternative policy.

|  |
| --- |
|  |

**Timetabling and Prioritising**

Factors to be considered in timetabling and prioritising policies for equality impact assessment.

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 | Choose an item. |
| Social need | Choose an item. |
| Effect on people’s daily lives | Choose an item. |
| Relevance to a public authority’s functions | Choose an item. |

Note: The Total Rating Score should be used to prioritise the policy in rank order with other policies screened in for equality impact assessment. This list of priorities will assist the public authority in timetabling. Details of the Public Authority’s Equality Impact Assessment Timetable should be included in the quarterly Screening Report.

Is the policy affected by timetables established by other relevant public authorities?

If yes, please provide details:

|  |
| --- |
| **N/A** |

**PART 4 - MONITORING**

Public authorities should consider the guidance contained in the Commission’s Monitoring Guidance for Use by Public Authorities (July 2007).

The Commission recommends that where the policy has been amended or an alternative policy introduced, the public authority should monitor more broadly than for adverse impact (See Benefits, P.9-10, paras 2.13 – 2.20 of the Monitoring Guidance).

Effective monitoring will help the public authority identify any future adverse impact arising from the policy which may lead the public authority to conduct an equality impact assessment, as well as help with future planning and policy development.

|  |
| --- |
| Equality screening will be reviewed for validity when the policy is next reviewed. |

**PART 5 - APPROVAL AND AUTHORISATION**

|  |  |  |  |
| --- | --- | --- | --- |
| **Policy Title:** | **Hybrid Working Policy** | **Version No:** | **2.0** |
| **Print Name** | **Position/Job Title** | **Signature** | **Date** |
| **Screened By:** | | | |
| Kerri Adams | HR Compliance & Governance Officer | A close-up of a signature  Description automatically generated | 11/07/2023 |
| **Approved by:** | | | |
| Paula Ludlow | HR Services Manager |  | 11/07/2023 |

Note: A copy of the Screening Template, for each policy screened should be ‘signed off’ and approved by a senior manager responsible for the policy, made easily accessible on the public authority’s website as soon as possible following completion and made available on request.

**APPENDIX 1**

|  |  |  |
| --- | --- | --- |
| **Part** | **Part Title** | **Description** |
| **1** | [**Policy Scoping**](#Part1) | Asks public authorities to provide details about the policy, procedure, practice and/or decision being screened and what available evidence you have gathered to help make an assessment of the likely impact on equality of opportunity and good relations |
| **2** | [**Screening Questions**](#Part2) | Asks about the extent of the likely impact of the policy on groups of people within each of the Section 75 categories. Details of the groups consulted and the level of assessment of the likely impact. This includes consideration of multiple identity and good relations issues. |
| **3** | [**Screening Decision**](#Part3) | Guides the public authority to reach a screening decision as to whether or not there is a need to carry out an equality impact assessment (EQIA), or tointroducemeasures to mitigate the likely impact, or the introduction of an alternative policy to better promote equality of opportunity and/or good relations. |
| **4** | [**Monitoring**](#Part4) | Provides guidance to public authorities on monitoring for adverse impact and broader monitoring. |
| **5** | [**Approval and Authorisation**](#Part5) | Verifies the public authority’s approval of a screening decision by a senior manager responsible for the policy. |

Policy Scoping

* Policy
* Available data

Screening Questions

* Apply screening questions
* Consider multiple identities

Screening Decision None/Minor/Major

Mitigate

Publish Template

Re-consider screening

Publish Template for information

Publish Template

EQIA

Monitor

**‘None’**

Screened out

**‘Major’**

Screened in for EQIA

**‘Minor’**

Screened out with mitigation

Concerns raised with evidence

Concerns raised with evidence re: screening decision