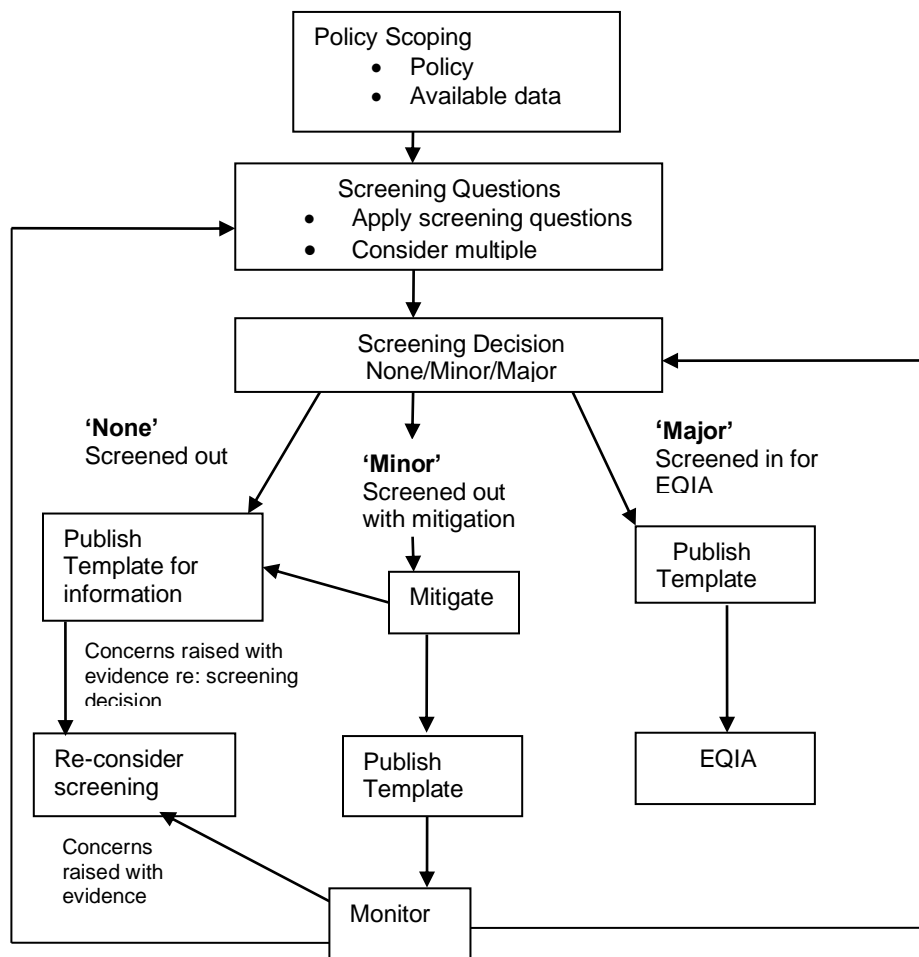


## Equality Screening Template

### Introduction

Part	Part Title	Description
1	<b>Policy Scoping</b>	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	<b>Screening Questions</b>	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	<b>Screening Decision</b>	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 to introduce measures to mitigate the likely impact, or the introduction of an alternative policy to better promote equality of opportunity and/or good relations.
4	<b>Monitoring</b>	Provides guidance to public authorities on monitoring for adverse impact and broader monitoring.
5	<b>Approval and Authorisation</b>	Verifies the public authority's approval of a screening decision by a senior manager responsible for the policy.



## 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

<b>Name of Policy</b>	Bereavement & Special Leave Policy
<b>Is it existing, revised or a new policy?</b>	Existing
<b>What is it trying to achieve? (Intended aims/outcomes)</b>	The policy outlines entitlement to paid and unpaid leave where required for the loss and bereavement of an immediate family member or unexpected circumstances such as a domestic emergency (e.g. Fire or flooding).
<b>Are there any Section 75 categories which might be expected to benefit from the intended policy? If so, explain how.</b>	No category is expected to have specific benefit from this policy.
<b>Who initiated or wrote the policy?</b>	HR Services Manager
<b>Who owns and who implements the policy?</b>	Human Resources

### Implementation Factors

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

Yes	<input type="checkbox"/>	No	<input checked="" type="checkbox"/>
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If yes, are they: (Select all applicable)

<input type="checkbox"/>	Financial
<input type="checkbox"/>	Legislative
<input type="checkbox"/>	Other – please specify: _____

### Main stakeholders affected

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

<input checked="" type="checkbox"/>	Staff
<input type="checkbox"/>	Service Users
<input type="checkbox"/>	Other Public Sector Organisations
<input type="checkbox"/>	Voluntary/ Community/ Trade Unions
<input type="checkbox"/>	Other – please specify: _____

**Other policies with a bearing on this policy:**

- Attendance Management & Rehabilitation Policy
- Time off for Dependents Policy

**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.

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	No evidence available to indicate correlation between this category and requirement to request Bereavement or Special Leave
Political opinion	This data is not specifically obtained, but the data of religious belief would be deemed a proxy for political opinion.
Racial group	No evidence available to indicate correlation between this category and requirement to request Bereavement or Special Leave
Age	<p><b>Internal data from Fair Employment Monitoring</b> of current Translink employees, shows age range breakdown of:</p> <p>17-34 = 633 (14.9%)</p> <p>35-44 = 1020 (24%)</p> <p>45-54 = 1455 (34.3%)</p> <p>55-64 = 1040 (24.5%)</p> <p>65+ = 93 (2.2%)</p> <p><b>Internal data of those that have been recorded as taking bereavement leave between 2017-2019</b> (619) shows an age breakdown as follows:</p> <p>17-34 = 32 (5.2%)</p> <p>35-44 = 97 (15.7%)</p> <p>45-54 = 243 (39.2%)</p> <p>55-64 = 217 (35%)</p>

	65+ = 30 (4.8%)
Marital status	No evidence available to indicate correlation between this category and requirement to request Bereavement or Special Leave
Sexual orientation	No evidence available to indicate correlation between this category and requirement to request Bereavement or Special Leave
Men and women generally	<p><b>Internal data from Fair Employment Monitoring</b> of current Translink employees, shows gender breakdown as:</p> <p>Men – 3640 (85.8%)</p> <p>Women – 603 (14.2%)</p> <p><b>Internal data of those who are recorded as having taken Bereavement leave between 2017-2019</b> shows 619 individual periods of bereavement leave. Gender breakdown of this shows:</p> <p>Men – 552 (89.1%)</p> <p>Women – 67 (10.8%)</p>
Disability	No evidence available to indicate correlation between this category and requirement to request Bereavement or Special Leave
Dependants	<p>Currently no internal evidence available to indicate correlation between this category and requirement to request Bereavement or Special Leave</p> <p>There is no legislation providing for additional leave on compassionate grounds on the loss of any family member, however a recent change of law has been applied in England and Wales to create statutory entitlement to bereavement leave and pay when an employee loses a child dependant under the age of 18. This law does not yet apply in NI.</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	There is no information to indicate that this category has any needs or priorities in relation to the Bereavement and Special Leave Policy
Political opinion	There is no information to indicate that this category has any needs or priorities in relation to the Bereavement and Special Leave Policy
Racial group	There is no information to indicate that this category has any needs or priorities in relation to the Bereavement and Special Leave Policy
Age	<p>Unfortunately, any age group can be affected by bereavement of a direct family member, but the data further demonstrates that there is no particular need or priority for the policy in any particular age group.</p> <p>The data shows that the largest age groups to take bereavement leave were between 45-64. Whilst this may indicate it is more likely that the middle to older age groups have a greater need for the policy, when compared to the percentage of current employees in those age groups, it can be seen that these are also the largest age groups of employees in Translink and so the figures of those having taken bereavement leave are in correlation with workforce age groupings.</p>
Marital status	There is no information to indicate that this category has any needs or priorities in relation to the Bereavement and Special Leave Policy
Sexual orientation	There is no information to indicate that this category has any needs or priorities in relation to the Bereavement and Special Leave Policy
Men and women generally	As with age, any gender can be affected by bereavement or need to take special leave. The data found also shows a similar correlation in percentages of gender between the current workforce and those who have requested the bereavement leave in 2017-2019 and so there is no identified need or priority for this policy for either men or women.
Disability	There is no information to indicate that this category has any needs or priorities in relation to the Bereavement and Special Leave Policy

Dependants	There is no information to indicate that this category has any needs or priorities in relation to the Bereavement and Special Leave Policy
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## 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: <https://www.equalityni.org/S75duties>

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

<b>A</b>	The policy is significant in terms of its strategic importance;
<b>B</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;
<b>C</b>	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;
<b>D</b>	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;
<b>E</b>	The policy is likely to be challenged by way of judicial review;
<b>F</b>	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

<b>A</b>	The policy is not unlawfully discriminatory and any residual potential impacts on people are
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	judged to be negligible;
<b>B</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;
<b>C</b>	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;
<b>D</b>	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'

<b>A</b>	The policy has no relevance to equality of opportunity or good relations.
<b>B</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 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 no identified content that would affect a person's religious belief in order to adhere to the Bereavement & Special Leave Policy.	None
Political opinion	There is no identified content that would affect a person's political opinion in order to adhere to the Bereavement & Special Leave Policy.	None
Racial group	There is no impact identified regarding any racial group in adhering to the Bereavement & Special Leave Policy.	None
Age	There is no impact identified regarding any particular age group to apply for or adhere to the Bereavement & Special Leave Policy.	None

Marital status	There is no impact identified regarding any marital status in adhering to the Bereavement & Special Leave Policy.	None
Sexual orientation	There is no impact identified regarding any sexual orientation in adhering to the Bereavement & Special Leave Policy.	None
Men and women generally	There is no impact identified regarding any particular gender group to apply for or adhere to the Bereavement & Special Leave Policy.	None
Disability	There is no impact identified regarding anyone with disability in adhering to the Bereavement & Special Leave Policy.	None
Dependants	There is no impact identified regarding anyone with dependants in adhering to the Bereavement & Special Leave Policy.	None

2 Are there opportunities to better promote equality of opportunity for people within the Section 75 equalities categories?		
Section 75 category	If <b>Yes</b> , provide details	If <b>No</b> , provide reasons
Religious belief		No, as there is no impact on this category
Political opinion		No, as there is no impact on this category
Racial group		No, as there is no impact on this category
Age		No, as there is no impact on this category
Marital status		No, as there is no impact on this category
Sexual orientation		No, as there is no impact on this category
Men and women		No, as there is no impact on this category



generally		
Disability		No, as there is no impact on this category
Dependants		No, as there is no impact on this category

**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 no identified content that would affect a person's religious belief therefore no impact on good relations between those of different religious belief.	None
Political opinion	There is no identified content that would affect a person's political opinion therefore no impact on good relations between those of different political opinion.	None
Racial group	There is no impact identified relating to racial group or good relations between different races.	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 <b>Yes</b> , provide details	If <b>No</b> , provide reasons
Religious belief		No, as this policy has no impact on this group
Political opinion		No, as this policy has no impact on this group
Racial group		No, as this policy has no impact on this 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.

There is little to no impact identified for any category.

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.

No mitigation required

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

N/A

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.

N/A

### **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	
Social need	
Effect on people's daily lives	
Relevance to a public authority's functions	

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

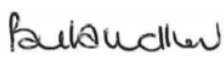
#### Part 4 - Monitoring

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.

#### Part 5 - Approval and authorisation

<b>Policy Title:</b>	<b>Bereavement &amp; Special Leave Policy</b>	<b>Version No:</b>	
<b>Print Name</b>	<b>Signature</b>	<b>Position/Job Title</b>	<b>Date</b>
<b>Screened By:</b>			
Kerri Adams		HR Compliance & Governance Officer	12. 05.20
<b>Approved by:</b>			
Paula Ludlow		HR Services Manager	28.05.20

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.