

## Initial Equalities Screening Record Form

<b>Date of Screening: August 2013</b>	<b>Directorate: Corporate Services</b>	<b>Section: HR</b>
<b>1. Activity to be assessed</b>	Policy on receipt of bequests	
<b>2. What is the activity?</b>	<input checked="" type="checkbox"/> Policy/strategy <input type="checkbox"/> Function/procedure <input type="checkbox"/> Project <input type="checkbox"/> Review <input type="checkbox"/> Service <input type="checkbox"/> Organisational change	
<b>3. Is it a new or existing activity?</b>	<input type="checkbox"/> New <input checked="" type="checkbox"/> Existing	
<b>4. Officer responsible for the screening</b>	Pat Butler	
<b>5. Who are the members of the screening team?</b>	Pat Butler, Anna Whitworth	
<b>6. What is the purpose of the activity?</b>	To protect employees from allegations that they have taken financial advantage of someone they have provided care to; to enable them to benefit from bequests in legitimate cases. The procedure sets out what the employee should do if they are named in a will, to ensure there is transparency about the transaction. This is an extremely rare occurrence.	
<b>7. Who is the activity designed to benefit/target?</b>	Employees, particularly those who build a long term relationship with clients in a care context.	
<b>Protected Characteristics</b>	<b>Please tick yes or no</b>	<b>Is there an impact?</b> What kind of equality impact may there be? Is the impact positive or adverse or is there a potential for both?  If the impact is neutral please give a reason.
		<b>What evidence do you have to support this?</b> E.g equality monitoring data, consultation results, customer satisfaction information etc  Please add a narrative to justify your claims around impacts and describe the analysis and interpretation of evidence to support your conclusion as this will inform members decision making, include consultation results/satisfaction information/equality monitoring data
<b>8. Disability Equality</b>	Y	N ✓
<b>9. Racial equality</b>	Y	N ✓
<b>10. Gender equality</b>	Y ✓	N  As a greater number of carers are female, this is more likely to impact on women. However, it rarely it never happens.
<b>11. Sexual orientation equality</b>	Y	N

		✓		
<b>12. Gender re-assignment</b>	Y	N ✓		
<b>13. Age equality</b>	Y ✓	N	As a greater number of carers are older workers, this is more likely to impact on the more mature worker. However it rarely if ever happens.	
<b>14. Religion and belief equality</b>	Y	N ✓		
<b>15. Pregnancy and maternity equality</b>	Y	N ✓		
<b>16. Marriage and civil partnership equality</b>	Y	N ✓		
<b>17. Please give details of any other potential impacts on any other group (e.g. those on lower incomes/carers/ex-offenders) and on promoting good community relations.</b>	N/A			
<b>18. If an adverse/negative impact has been identified can it be justified on grounds of promoting equality of opportunity for one group or for any other reason?</b>	N/A			
<b>19. If there is any difference in the impact of the activity when considered for each of the equality groups listed in 8 – 14 above; how significant is the difference in terms of its nature and the number of people likely to be affected?</b>	Differences are not significant; they just reflect the typical composition of this sector of the workforce. There has not been a single case of this happening in many years – the policy simply is there to protect people in the rare case that they are mentioned in a will by giving them a procedure to follow to keep the matter transparent and beyond reproach.			
<b>20. Could the impact constitute unlawful discrimination in relation to any of the Equality Duties?</b>	Y	N✓		
<b>21. What further information or data is required to better understand the impact? Where and how can that information be obtained?</b>	N/A			

22. On the basis of sections 7 – 17 above is a full impact assessment required?	Y	N✓		
23. If a full impact assessment is not required; what actions will you take to reduce or remove any potential differential/adverse impact, to further promote equality of opportunity through this activity or to obtain further information or data? Please complete the action plan in full, adding more rows as needed.				
Action	Timescale	Person Responsible	Milestone/Success Criteria	
24. Which service, business or work plan will these actions be included in?	N/A			
25. Please list the current actions undertaken to advance equality or examples of good practice identified as part of the screening?	N/A			
26. Chief Officers signature.	Signature: T Madden			