

Equality Analysis Guidance and Template

April 2014

Equality Analysis Guidance

The Equalities Act (2010) requires public organisations, such as ourselves, to eliminate unlawful discrimination, advance equality of opportunity and foster good relations between people who may or may not share a protected characteristic. The Equalities Act has identified nine protected characteristics that you must test against to ensure equality has been addressed.

“This document demonstrates commitment to create a positive culture of respect for all individuals, including staff, patients, their families and carers as well as community partners. The intention is, as required by the Equality Act 2010, to identify, remove or minimise discriminatory practice in the nine named protected characteristics of age, disability, sex, gender reassignment, pregnancy and maternity, race, sexual orientation, religion or belief, and marriage and civil partnership. It is also intended to use the Human Rights Act 1998 to promote positive practice and value the diversity of all individuals and communities”.

Within the Equalities Act, lies the Public Sector Equality Duty. The intention of the Public Sector Equality Duty is to ensure that a public authority, in the exercise of its functions, has due regard to three main aims. The main aims are to:

- eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under this Act;
- advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it;
- foster good relations between persons who share a relevant protected characteristic and persons who do not share it.

“Having due regard” means consciously thinking about the three aims of the Equality Duty as part of the process of decision-making. This means that consideration of equality issues must influence the decisions reached by public bodies – such as in how they act as employers; how they develop, evaluate and review policy; how they design, deliver and evaluate services, and how they commission and procure from others.

To help us achieve this, we are required to analyse the effect of any policy, practice, function or service change (for ease of understanding, referred to throughout as “project”). This is what is known as an Equality Analysis or what used to be referred to as an Equality Impact Assessment.

Equality Analysis and why you have to do it

An equality analysis of our work/a project establishes whether there is a negative effect or impact on particular social groups. This enables the organisation to demonstrate that it does not discriminate and, where possible, it promotes equality.

Our Equality Analysis tool is both transparent and simple to use and provides you with a number of benefits. Some of these are as follows:

- The template will focus you on the protected characteristics so you are clear what you are checking against.
- Other projects that have had Equality Analysis undertaken may also provide you with useful information for your EA.
- Have all our staff trained in Equality Analysis will promote sharing and support.

When do you need to consider Equality Analysis? All our work or “projects” require you to consider the impact of the Equalities Act. So if you are commissioning services, configuring services changing services, decommissioning services, developing policies which impact on patients or staff, or any work which has an impact on patients and the public you must consider equality analysis. Hopefully, most projects will have a positive impact on all the communities you serve. You would not normally require equality analysis if you were providing an activity or update report.

In addition, it is important to remember that by systemically and regularly involving local people in plans and decisions about projects, we minimise any opportunities for negative impact. We therefore need to make this a regular practice and ensure people from different communities and protected groups are engaged early on, during, after and when reviewing or monitoring outcomes of our projects.

By not considering or completing an Equality Analysis, you will open yourself to challenges from either the Board (if your project requires Board approval and at which members of the public may be present) or by members of the public once your “project” is in the public domain in some way. This may result in delays to your project implementation which will be both costly and damaging to the CCG and will seriously impede the business of the organisation.

In order to complete Equality Analysis you must have undergone training in this area. Please contact the PPI lead or training lead to identify when the next training is available.

How to complete the template – reassurance!

You won't believe how easy this is, but a few reassurances before we start!

- You are not expected to know every aspect of every community or protected characteristic, but you must be sensitive to their needs and open and listening to their messages. Equality analysis is in part about developing your awareness of the communities you serve.
- As NHS organisations we regularly collate data about different groups in our communities, and you can use this information to inform your equality analysis.
- The training you will receive will take you through every step of completing an Equality Analysis and there will be support for you after the training.

How to complete the template – 5 steps to Equality Analysis.

Keep the focus of your thinking on what your project is trying to achieve and then think about the protected characteristic you are considering

Column 1 - Equality group (or protected characteristic): This column tells you what the protected characteristic is and guides you in how you should be thinking about it in relation to your project.

Column 2 - What evidence has been used for this assessment? This is where your work begins! Have you checked for local evidence or national evidence? This could be something like checking what the JSNA says, or even “Googling” the characteristic issue to see what information is available on the internet (this might be particularly useful when checking out less familiar characteristics). Has any work been done with patients or patient groups locally? Your PPI lead should be able to help you with this, or steer you in the right direction. Have you checked your complaints data, to see if certain groups are at greater risk than others? Have you checked what other Equality Analysis has been completed. These are readily available, and may well provide you with relevant information

Column 3 - Have you consulted on this project? Have you done any patient involvement and engagement work on this? Talk to your PPI and equality as there may be heaps of evidence that has been collected to support your thinking on this.

Column 4 - What is the negative impact? So if you have identified some negative impact on a protected characteristic, what is it? Could this negative impact also affect any other of the protected characteristics? Could this pose a risk to the CCG in any way?

Column 5 - How are you going to address issues identified? This is your mini action plan! What can you/the organisation do to mitigate the effect of this “project” on that particular characteristic? Are there resource implications? How quickly can this be addressed? Which groups need to be involved in bringing about change? Finally remember that you may not be able to avoid the issue, but you need to be up front and say that it will have an impact on a particular community.

Final thoughts

Equality Analysis is there to enhance your work. It is meant to be worthwhile but also a challenging process.

- It should be carried out at the beginning of the planning stage of the project and it is sometimes worthwhile to involve colleagues/partners in the analysis as they may have information or experiences in how the project impacts on certain groups
- Take a common-sense approach to it; step outside your own role and look at it as an outsider would view it.
- Make time for it in your planning and allow for potential collaboration with other stakeholders.
- Where a likely impact is not known, action should be taken to try to acquire that information through consultation and by involving the groups affected.
- Your equality analysis will be a public document and published on the CCGs website so be prepared for people to check how you conducted it.

Further information

To learn more about the Equalities Act (2010) click on this [link](#)

To learn more about Protected Characteristics click on this [link](#)

To see more resources relating to Equality Analysis click on this [link](#)

Equality Analysis Checklist

By completing this document in full you will have gathered evidence to ensure, documentation, service design, delivery and organisational decisions have due regard for the Equality Act 2010 and will also provide evidence to support the Public Sector Equality Duty and the Equality Delivery System grading process.

The evidence can demonstrate:

- an understanding that there are differing complexities for each protected characteristic group
- that a dialogue is occurring
- wider engagement and involvement
- the impact on each protected characteristic group
- what data and information has been used highlighting areas where it has not been collected
- agreement regarding the impact of the evidence
- agreement on the remedial actions required
- identification of a lead to take the action forward, with timescales

Full and comprehensive guidance on equality analysis can be found on the [Equality and Human Rights Commission website](#)

Equality Analysis Checklist

Name of the policy / function / service development being assessed	
Briefly describe its aims and objectives:	
Directorate lead	

Equality Analysis Checklist

Go through each protected characteristic below and consider whether the policy / function / service could have any impact (such as how it might affect understanding, access, patient safety etc.) on groups from the identified protected characteristic, involve service users where possible and get their opinion, use demographic / census data (available from public health and other sources), surveys (past or maybe carry one out), talk to staff in PALS and Complaints.

Please ensure any remedial actions are Specific, Measureable, Achievable, Realistic, and Timely(SMART)

Equality Group	What evidence has been used for this assessment?	What engagement and consultation has been used?	Identify positive and negative impacts	How are you going to address issues identified and who will you involve?	Lead and Timeframe
<p>Age Think about different age groups and think about the policy / function / service and the way the user would access, is it user friendly for that age?</p>					
<p>Disability Think outside the box, you may not be able to see the disability. It could be physical (hearing, seeing) or a learning disability (Autism).</p> <ul style="list-style-type: none"> • Accessibility – venue, location, signage, furniture, getting around • Is information written in an understandable format • Disability awareness training for staff • Actively involve the service user and talk it through with them 					

<p>Gender Reassignment Think about creating an environment within the service / policy or function that is user friendly and non judgemental.</p> <p>If the policy / function / service are specifically targeting this protected characteristic, think carefully about training, confidentiality and communication skills.</p>					
<p>Marriage and Civil Partnership Think about access and confidentiality, the partner may not be aware of involvement or access to the service.</p> <p>Staff training.</p>					
<p>Pregnancy and maternity The policy / function / service must be accessible for all, e.g. opening hours.</p> <p>Are the chairs appropriate for breast feeding; is there a private area? Are there baby changing facilities and is there space for buggies?</p>					
<p>Race You need to think carefully about the local demographics of the population who will be accessing the policy / function / service. Talk to public health.</p>					

<p>Think about:</p> <ul style="list-style-type: none"> • Cultural issues (gender, clothing etc.) • Languages • Support to access • Staff training on cultural awareness, interpreting 					
<p>Religion or Belief As above think about local population and what religion or belief they may have.</p> <p>Think about:</p> <ul style="list-style-type: none"> • Staff training on respecting differences, religious beliefs • Are you trying to implement during a time of religious holidays e.g. Ramadan • Is there are area for prayer times 					
<p>Sex This is simply the impact on males / females.</p> <p>For example same sex accommodation, are their areas for privacy?</p> <p>Is it accessible for both taking into account working service users / is it accessible would it be a venue they would go to?</p>					

<p>Sexual Orientation: Don't make assumptions. This protected characteristic may not be visibly obvious.</p> <p>Providing an environment that is welcoming for example visual aids, posters, leaflets.</p> <p>Using language that respects LGB&T people.</p> <p>Staff training on how to ask LGB&T people to disclose their sexual orientation without fear or prejudice.</p>					
<p>Carers Does your policy / function / service impact on carers? Ask them.</p> <p>Do you need to think about venue, timing?</p> <p>What support will you be offering?</p>					

For all negative impacts, please provide an action plan to identify how you will address these. (See action plan template)

Please send to PPI Lead for publication on website (this is a legal requirement).

Screening completed by (please include everyone's name)	Organisation	Date

Equality Analysis Action Plan

Name of project:	Project lead:
Brief outline of project:	
Potential negative impact on the following characteristics:	
Action required to mitigate negative impact:	