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| **INITIAL EQUALITY SCREENING FORM** | | | | | | |
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| DIVISION**:** | People & Culture | | | **TEAM:** | Human Resources | |
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| **Name of Policy/Decision/Practice to be Equality Screened** | | | | | | |
| Probation Policy and probation review forms | | | | | | |
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| **Is it New or Revised?** | | New | | | | |
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| **Who Does the Policy Effect, e.g Service Users/Staff:** | | | All staff equally | | | |
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| **Question 1** – Define the aim of the Programme or . What is it trying to achieve? (Intended aims/outcomes) | | | | | | |
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| The purpose of a probationary period is to allow time for managers/supervisors to determine whether the new employee has demonstrated the values, capability, skills and knowledge necessary to do the job and work for Invest NI, and to provide the opportunity for suitable induction and guidance. In addition, the probationary period enables the new employee to determine whether the organisation and the post they are appointed to meet their individual needs.  At the end of the probationary period a decision will be made as to whether or not the employee is suitable for employment. | | | | | | |
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| **Question 2** – Does the Programme or have the potential to have an impact on the promotion of equality impact for any of the Section 75 groupings? (See Question 4 for list of equality groups.) | | | | | | /No |
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| If no go to Question 6 – Good Relations. | | | | If yes please continue. | | |
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| Whilst the policy will be applied to all staff equally, someone with a disability may be impacted in relation to the application of the policy, e.g. they may require time off for appointments or have greater absence, or they may need an adjustment to their working hours, or may need additional equipment or software or additional time to complete training. This could impact on the performance assessment of e.g. attendance, work productivity, quality of work.  Someone with dependants may also be Impacted as they may need greater flexibility in working hours to deal with family emergencies or caring responsibilities. This could impact on the performance assessment of e.g. attendance, work productivity, quality of work. | | | | | | |
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| **Consideration of Available Data/Research** | | | | | | |
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| **Question 3** – What  is there available – statistics or perception – to help you decide who the Programme or might affect the most? i.e. What evidence, qualitative or quantitative, have you gathered to inform your decision making process? | | | | | | |
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| Reviewed the following publications:  Inclusive Probation for Neurodivergent Employees  Negotiation Probation Policies – UNISON  Disability Discrimination & Dismissal – People Management article  2.5% of employees have confirmed that they have a disability.  [Probation Period: Employers’ Guide | DavidsonMorris](https://www.davidsonmorris.com/probation-period/)  [Research indicates that employees with dependants may face challenges during their probation period, which can lead to failure. According to a study, 18% of workers have had their probation period extended or failed, with poor performance being the most common reason cited by employers. Additionally, absence and time-keeping issues are significant factors contributing to failures during probation. It is essential for employers to provide clear guidelines and support to help employees succeed during this critical phase of their employment](https://www.bing.com/ck/a?!&&p=6255885382abd12eee02f6988187afa2d0fc160c5b39b2145dd1f003a911f345JmltdHM9MTc1Njg1NzYwMA&ptn=3&ver=2&hsh=4&fclid=2d10d7ce-5555-64f2-1d03-c192543e65f6&u=a1aHR0cHM6Ly93d3cuZGF2aWRzb25tb3JyaXMuY29tL3Byb2JhdGlvbi1wZXJpb2Qv&ntb=1).  We do not currently hold data on dependants. | | | | | | |

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| **Assessment of Impact** | | | | |
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| **Question 4** – Explain if what you plan to do is likely to be perceived as having a high, medium or low impact upon the 9 Equality groupings according to their needs. Also if what you are planning to do is likely to be perceived as having a positive or negative effect upon the 3 different groups in relation to the promotion of good relations. | | | | |
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| **9 Equality Groups** | **Perceived Impact**  **High – (H)**  **Medium - (M)**  **Low – (L)** | **Why this rating?** | **Promotion of Good Relations**  **(Yes/No)** | **Why this rating?** |
| Religious Belief | Low | Equal for all staff | N/A | N/A |
| Racial/Ethnic Group | Low | Equal for all staff | N/A | N/A |
| Political Opinion | Low | Equal for all staff | N/A | N/A |
| Age | Low | Equal for all staff | N/A | N/A |
| Gender | Low | Equal for all staff | N/A | N/A |
| Marital Status | Low | Equal for all staff | N/A | N/A |
| Sexual Orientation | Low | Equal for all staff | N/A | N/A |
| Disability | Low | While staff with a disability may be more impacted the policy, reasonable adjustments will be considered and measures put in place to support those with a disability, | N/A | N/A |
| Dependants | Low | Measures have been put in place within the policy to support those with dependants. | N/A | N/A |
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| **Opportunities to better promote Equality of Opportunity** | | | | |
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| **Question 5** – Are there steps which could be taken to reduce any adverse impact upon the Section 75 groups as identified in Question 4? | | | | |
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| The policy has provisions incorporated to provide support to individuals with a disability and managers are required to consider any reasonable adjustments. These measures will ensure an individual with a disability is given the support and time needed to perform to the required standards. Managers can also obtain advice and guidance from HR. The policy also allows for regular feedback so there is an opportunity for the employee to raise any concerns at an early stage, and for the line manager to provide feedback so the employee is clear about what is expected of them.  The policy also allows for an extension to be applied in extenuating circumstances such as employee’s sickness or other authorised absence. Whilst this will not be necessary for all situations where an employee has needed greater flexibility due to their caring responsibilities, it can be implemented if required in order to ensure a considered probation assessment. | | | | | Equal for all staff |
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| **Good Relations** | | | | |
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| **Question 6** – Is there an opportunity in what you are trying to do to better promote Good Relations between the groups relating to Religious Belief or Racial/Ethnic Group or Political Opinion? | | | | |
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| N/A | | | | | Equal for all staff |

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| **Consultation** | | | | | | | |
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| **Question 7** – Tell us about who have talked to about your proposals internally or externally to help you decide if the needs further or no further equality investigation. | | | | | | | |
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| NIPSA, Equality Team, ExCo, HR Colleagues. | | | | | | | |
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| **Question 8** – In light of the above should the be | | | | | | | |
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|  | | Screened Out – No Equality Issues – Please provide rationale for this decision. | | | | | |
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|  | | Screened Out with some adjustments. – What adjustments have you made? | | | | | |
| The policy has considered potential impact on equality of opportunity and has made adjustments to consider those with a disability and those with caring responsibilities. | | | | | | | |
|  | | Screened In for a deeper level of analysis of what is being considered or intended to be undertaken. (EQIA) – Please provide rationale for this decision. | | | | | |
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| Signed: | | | Paula Ludlow | | | Date: | 10.09.25 |
|  | | | Policy /Programme Owner | |  | |  |
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| Approved | | | Pamela Marron | | | Date: | 08/09/2025 |
|  | | | Equality Manager | |  | |  |
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| Modifications made. | | | | | | Date: |  |
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|  | | | | | | | |
| Date: |  | | |
| Approved by Equality Manager | | | | |  | |  |