Travel

Section 75 Policy Screening Form

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 the policy

Taxsaver Annual Travel Card Scheme

Is this an existing, revised or a new policy?

New

What is it trying to achieve? (intended aims/outcomes)

Taxsaver is the name of an annual commuter travel card in the Republic of Ireland available through an employer salary sacrifice scheme. Invest NI takes its environmental obligation seriously. The policy aims to reduce the individual carbon footprint of staff by encouraging a greater use of public transport. The organisation can play a role in reducing traffic congestion and pollution by adopting this 'greener' initiative. With Taxsaver the employee (and employer) can save money on Tax, Universal Social Charge and PRSI by paying for their travel directly from their salary.

Are there any Section 75 categories which might be expected to benefit from the intended policy?
If so, explain how.

The policy applies to all members of staff in the Dublin Office fairly and consistently irrespective of which equality group(s) they belong to.

Who initiated or wrote the policy?

Invest NI's Human Resources Team.

Who owns and who implements the policy?

The policy is owned by the organisation and is implemented by the Human Resources Team. HR works closely with the INI Finance Department to implement and manage the scheme.

Implementation factors

Are there any factors which could contribute to/detract from the intended aim/outcome of the policy/decision?
If yes, are they

financial

legislative

other, please specify ___

Main stakeholders affected

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

X staff (based in the Dublin Office)

service users

other public sector organisations

voluntary/community/trade unions

other, please specify _

Other policies with a bearing on this policy

- what are they?

Corporate Plan (Corporate Social Responsibilty)

- who owns them?

Invest NI TMT

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	The policy applies to all members of staff fairly and consistently irrespective of which equality group they belong to.
Political opinion	**As above**
Racial group	**As above**
Age	**As above**
Marital status	**As above**
Sexual orientation	**As above**
Men and women generally	**As above**
Disability	**As above**
Dependants	**As above**

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	**The policy applies to all members of staff fairly and consistently and we do not feel it impacts on any particular section 75 category.**
Political opinion	**As above**
Racial group	**As above**
Age	**As above**
Marital status	**As above**
Sexual orientation	**As above**
Men and women generally	**As above**
Disability	**As above**
Dependants	**As above**

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 this Guide.

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.

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.

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 a '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.

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.

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.

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.

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	N/A	None
Political opinion	N/A	None
Racial group	N/A	None
Age	N/A	None
Marital status	N/A	None
Sexual orientation	N/A	None
Men and women generally	N/A	None
Disability	N/A	None
Dependants	N/A	None

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 this policy does not provide opportunities to promote equality amongst particular groups.
Political opinion		No as this policy does not provide opportunities to promote equality amongst particular groups.
Racial group		No as this policy does not provide opportunities to promote equality amongst particular groups.
Age		No as this policy does not provide opportunities to promote equality amongst particular groups.
Marital status		No as this policy does not provide opportunities to promote equality amongst particular groups.
Sexual orientation		No as this policy does not provide opportunities to promote equality amongst particular groups.
Men and women		No as this policy does not provide opportunities to promote equality

generally		amongst particular groups.
Disability		No as this policy does not provide opportunities to promote equality amongst particular groups.
Dependants		No as this policy does not provide opportunities to promote equality amongst particular groups.

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	None	
Political opinion	None	
Racial group	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 **Yes**, provide details	If **No**, provide reasons
Religious belief		No this policy does not provide scope for such opportunities.
Political opinion		No this policy does not provide scope for such opportunities.
Racial group		No this policy does not provide scope for such opportunities.

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).*

N/A

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.

It is not considered necessary for this policy.

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 necessary

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.

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	N/A
Social need	N/A
Effect on people's daily lives	N/A
Relevance to a public authority's functions	N/A

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

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

Screened by:	**Position/Job Title**	**Date**
Patricia McSorley	HR Acc Mgr	04.03.11.
Approved by:		
Ian Hagel	HR Director	4.3.11

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.