

Expenses Policy Equality Screening

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. It should be remembered that the Section 75 statutory duties apply to internal policies (relating to people who work for the University), as well as external policies (relating to those who are, or could be, served by the University).

A. Information about the policy

Name of the policy

- Staff Expenses Policy

Is this an existing, revised or a new policy?

- Revised policy

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

- To ensure staff are reimbursed where they incur incidental expenses wholly necessarily and exclusively on university business

Are there any Section 75 categories which might be expected to benefit from the policy?

If so, explain how.

- No

Who initiated or wrote the policy?

- Financial Controller

Who owns and who implements the policy?

- Finance Directorate

B. Implementation factors

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

Yes

If yes, are they

- financial?
- legislative?
- other?(please specify) _____

C. Main stakeholders affected

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

- staff
- service users
- other public sector organisations
- voluntary/community/trade unions
- other, please specify - individuals with a staff number such as PHD research students

D. Other policies with a bearing on this policy

- what are they? (please list)
 - Re-location policy
 - Travel policy
 - Anti Fraud Policy
 - The Bribery Act 2010 policy
 - Financial Responsibilities of Staff

E. Available evidence

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	Ineligible expenses listed in Section 6 would not impact on an individual in relation to religious belief.
Political opinion	No evidence or information identified that would have an impact.
Racial group	No evidence or information identified that would have an impact
Age	No evidence or information identified that would have an impact.
Marital status	No evidence or information identified that would have an impact
Sexual orientation	No evidence or information identified that would have an impact
Men and women generally	No evidence or information identified that would have an impact
Disability	In the area of disability it may be considered a reasonable adjustment to assist a member of staff with a disability in the course of their travel for

	<p>business reasons e.g. if they need to be accompanied, if they are travelling with additional baggage due to medications, if there is an additional cost for extra space whilst travelling etc. Two hundred and seventy eight staff in the University have declared a disability and/or long term condition.</p> <p>A paragraph entitled “Reasonable Adjustment for Disability” has been included in the Staff Expenses policy.</p>
Dependants	<p>It is recognised that staff may incur additional childcare/caring costs as a direct result of the need to attend their place of employment (or another venue) outside of normal working hours to facilitate University business. However this is not deemed to be wholly, exclusively and necessarily in relation to performance of work activities and it is noted as normally ineligible in the policy.</p>

F. Needs, experiences and priorities

Based on the information in the preceding table, 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	Staff shouldn't need to claim any work related expenses specifically related to religious belief
Political opinion	Staff shouldn't need to claim any work related expenses specifically related to political opinion

Racial group	Staff shouldn't need to claim any work related expenses specifically related to racial group
Age	Staff shouldn't need to claim any work related expenses specifically related to age
Marital status	Staff shouldn't need to claim any work related expenses specifically related to marital status
Sexual orientation	Staff shouldn't need to claim any work related expenses specifically related to sexual orientation
Men and women generally	Staff shouldn't need to claim any work related expenses specifically related to gender
Disability	<p>If additional costs are incurred due to disability and/or long term condition may be permitted as a "reasonable adjustment" so long as they are necessarily incurred.</p> <p>Provision to assist staff with disabilities and/or long term conditions has been added to the policy as a result of this screening exercise.</p>
Dependants	The policy states that additional childcare/caring costs incurred as a direct result of the need to attend the place of employment (or another venue) outside of normal working hours to facilitate University business childcare are normally ineligible.

Part 2 Screening questions

A What is the likely impact on equality of opportunity for those affected by this policy, for each of the Section 75 equality categories?		
Section 75 category	Details of policy impact	Level of impact? minor/major/none
Religious belief	None	None
Political opinion	None	None
Racial group	None	None
Age	None	None
Marital status	None	None
Sexual orientation	None	None
Men and women generally	None	None
Disability	None	None
Dependants	None	None

B Are there opportunities to better promote equality of opportunity for people within the Section 75 equality categories?

Section 75 category	If Yes , provide details	If No , provide reasons
Religious belief		Policy has no impact
Political opinion		Policy has no impact
Racial group		Policy has no impact
Age		Policy has no impact
Marital status		Policy has no impact
Sexual orientation		Policy has no impact
Men and women generally		Policy has no impact
Disability	Yes. The policy explicitly recognises that staff with a disability and/or long term condition may require additional financial support.	Policy has a positive impact.

Dependants	The policy states that Childcare is normally ineligible for reimbursement.	Policy has no impact
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C To what extent is the policy likely to impact on good relations between people of different religious belief, political opinion or racial group?

Good relations category	Details of policy impact	Level of impact minor/major/none
Religious belief	None	None
Political opinion	None	None
Racial group	None	None

D 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		Policy has no impact
Political opinion		Policy has no impact
Racial group		Policy has no impact

E 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).

Provide details of data on the impact of the policy on people with multiple identities. Specify relevant Section 75 categories concerned.

None, other than fact that disabled members of staff with childcare responsibilities may be impacted on two levels.

Due consideration should be given to requests for reimbursement/claims for expenses on a case by case basis.

F Disability Duties

Consider whether the policy:

- I. Discourages disabled people from participating in public life and fails to promote positive attitudes towards disabled people.

No

- II. Provides an opportunity to better promote positive attitudes towards disabled people or encourages their participation in public life.

Yes. For reasons stated above.

Part 3. Screening decision

A Policy does not require an EQIA. In this situation, please provide details of the reason for this decision.

This policy does not require an EQIA.

B Policy has minor equality impacts which can be mitigated/provided by an alternative policy and therefore does not require an EQIA. In this situation please provide details of the reason for this decision together with the proposed changes/amendments for alternative policy to be introduced.

The policy has been screened and includes a mitigating provision that explicitly recognises that expenses incurred by staff with a disability and/or long term condition may be permitted as "reasonable adjustments".

C Policy requires an EQIA
Please provide reasons for this decision.

N/A

D Timetabling and prioritising

If option C has been selected under Screening decision, then complete the following table:

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	1
Social need	1
Effect on people's daily lives	1

E Is the policy affected by timetables established by other relevant public authorities?



If yes, please provide details

N/A

Part 4. Monitoring

Effective monitoring will help the University identify any future adverse impact arising from the policy which may lead the University 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
Gillian Mayhew 	Financial Controller	Nov 2017
Approved by:		
Wendy Galbraith 	Director of Finance	Dec 2017

Note: A copy of the Screening Template, for each policy screened should be 'signed off' and approved by the senior manager responsible for the policy and made easily accessible on the University's website as soon as possible following completion and made available on request.

