



Equality Impact: Screening and Assessment Form

Section 1: Policy details - policy is shorthand for any activity of the organisation and could include strategies, criteria, provisions, functions, practices and activities including the delivery of our service.	
a. Name of policy or practice (list also any linked policies or decisions)	Budget Management Framework
b. Name of department	Management Accounts, Finance department
c. Name of Lead	Maria McFeat, Head of Financial Planning and Reporting
d. Equality Impact Assessment Team [names, job roles]	David Bywater, Consultant Paramedic, Clinical directorate Walid Hussain, Finance Officer, Finance department Emma Stewart, Finance Trainee, Finance department
e. Date of assessment	30 January 2017
f. Who are the main target groups / who will be affected by the policy?	The Scottish Ambulance Service, patients, public and the Scottish Government will be affected by this policy
g. What are the intended outcomes / purpose of the policy?	The outcome of this policy is to ensure efficient and effective budgeting
h. Is the policy relevant to the General Duty to eliminate discrimination? advance equality of opportunity? foster good relations?	No
If yes to any of the three needs complete all sections of the form (2- 7) If no to all of the three needs provide brief detail as to why this is the case and complete only section 7 If don't know: complete sections 2 and 3 to help assess relevance	After consideration, it has not been identified that the policy is relevant to any of these three aims. The policy provides a high level framework for budget setting and monitoring principles which does not directly result in any identified impacts regarding equality. Each budget will be subject to an individual Equality Impact Assessment which will highlight any specific equality issues which may arise. It would be impracticable to predict and assess all future budgets.

Section 2: Evidence, consultation and involvement Please list the available evidence used to assess the impact of this policy, including the sources listed below. Please also identify any gaps in evidence and what will be done to address this.			
a. Previous consultation / involvement with community, including individuals or groups or staff as relevant. Please outline details of any involvement / consultation, including dates carried out and protected characteristics			
Details of consultations - where, who was involved	Date	Key findings	Protected characteristics
			Age
			Disability
			Gender reassignment
			Gender / sex
			Marriage / civil partnership *
			Pregnancy / maternity
			Race
			Religion / belief
			Sexual orientation
			Cross cutting - e.g. health inequalities - people with poor mental health, low incomes, involved in the criminal justice system, those with poor literacy, are homeless or those who live in rural areas. Other?

	Available evidence
b. Research and relevant information	
c. Knowledge of policy lead	
d. Equality monitoring information -- including service and employee information	
e. Feedback from service users, partner or other organisations as relevant	
f. Other	
g. Are there any gaps in evidence? Please indicate how these will be addressed	
Gaps identified	
Measure to address these; give brief details. Further research? Consultation? Other	
Note: specific actions relating to these measures can be listed at section 5	

Section 3: Analysis of positive and negative impacts			
Please detail impacts in relation to the three needs specifying where the impact is in relation to a particular need - eliminating discrimination, advancing equality of opportunity and fostering good relations			
Protected characteristics	i. Eliminating discrimination	ii. Advancing equality of opportunity	iii. Fostering good relations
Age			
Positive impacts			
Negative impacts			
Opportunities to enhance equality			
Disability			
Positive impacts			
Negative impacts			
Opportunities to enhance equality			
Gender reassignment			
Positive impacts			
Negative impacts			
Opportunities to enhance equality			
Gender / sex			
Positive impacts			
Negative impacts			
Opportunities to enhance equality			
Marriage / civil partnership			
Positive impacts			

Negative impacts	
Opportunities to enhance equality	
Pregnancy / maternity	
Positive impacts	
Negative impacts	
Opportunities to enhance equality	
Race	
Positive impacts	
Negative impacts	
Opportunities to enhance equality	
Religion / belief	
Positive impacts	
Negative impacts	
Opportunities to enhance equality	
Sexual orientation	
Positive impacts	
Negative impacts	
Opportunities to enhance equality	
Cross cutting - e.g. health inequalities people with poor mental health, low incomes, involved in the criminal justice system, those with poor literacy,	

are homeless or those who live in rural areas. Other	
Positive impacts	
Negative impacts	
Opportunities to enhance equality	
Note: specific actions relating to these measures can be listed at section 5	

Section 4: Addressing impacts	
Select which of the following apply to your policy and give a brief explanation - to be expanded in Section 5: Action plan	
	Reasons
a. No major change - the EQIA shows that the policy is robust, there is no potential for discrimination or adverse impact and all opportunities to promote equality have been taken	
b. Adjust the policy – the EQIA identifies potential problems or missed opportunities and you are making adjustments or introducing new measures to the policy to remove barriers or promote equality or foster good relations	
c. Continue the development and implementation of the policy without adjustments – the EQIA identifies potential for adverse impact or missed opportunity to promote equality. Justifications for continuing without making changes must be clearly set out, these should be compelling and in line with the duty to	

<p>have due regard. See option d. if you find unlawful discrimination. Before choosing this option you must contact the Equalities Manager to discuss the implications.</p>	
<p>d. Stop and remove the policy - there is actual or potential unlawful discrimination and these cannot be mitigated. The policy must be stopped and removed or changed. Before choosing this option you must contact the Equalities Manager to discuss the implications.</p>	

Section 5: Action plan Please describe the action that will be taken following the assessment in order to reduce or remove any negative / adverse impacts, promote any positive impacts, or gather further information or evidence or further consultation					
Action	Output	Outcome	Lead responsible	Date	Protected characteristic / cross cutting issue*

* list which characteristic is relevant - age, disability, gender reassignment, gender / sex, marriage and civil partnership, pregnancy and maternity, race, religion / belief, sexual orientation or cross cutting issue e.g. poor mental health, illiteracy etc

Section 6: Monitoring and review Please detail the arrangements for review and monitoring of the policy	
	Details
a. How will the policy be monitored? Provide dates as appropriate	Reviewed annually or on the implementation of new finance systems
b. What equalities monitoring will be put in place?	N/A
c. When will the policy be reviewed? Provide a review date.	Annually - June 2018

Section 7: Sign off Please provide signatures as appropriate			
Name of Lead	Title	Signature	Date
Maria McFeat	Head of Financial Planning and Reporting		30 January 2017
Completed form: copy of completed form to be retained by department and copy forwarded to Equalities Manager for publication on Service website			
Provide date this was sent	19 May 2017		

