Section 75 Policy Screening Form

Part 1: Policy Scoping

The first stage of the screening process involves scoping the policy or policy area. 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.

You 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 or policy area:

Parental Bereavement Leave

Is this an existing, revised or a new policy/policy area?

Existing	Revised	New
		x

Brief Description

Procedures for staff and line managers to implement to allow bereaved parents to take a period of up to 2 weeks leave following the loss of a child under the age of 18 (including a baby that is stillborn after at least 24 weeks of pregnancy).

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

Ensure the Association is complying with the Parental Bereavement Leave Regulations (N.I) 2023 and the Statutory Parental Bereavement Pay (General) Regulations (N.I) 2023
To outline:

- The statutory entitlements for PBL and PBP
- The support and services that may be provided on a case-by-case basis.
- The notice requirements staff members must make prior to taking PBL and claiming PBP, and to
- Ensure managers are aware of their responsibilities to staff members who are covered by the policy.

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

YES	NO	N/A
x		

If YES, explain how.

The Parental Bereavement Leave and Pay Policy applies to all staff members, therefore staff members from all nine categories may benefit from this policy

Who initiated or wrote the policy?

Apex Housing Association

Who owns and who implements each element of the policy?

Personnel & Training department and line managers

Implementation factors

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

YES	NO	N/A
x		

If YES, are they

Financial: YES (If YES, please detail)

Legislative: Y / N (If YES, please detail)

Other, please specify:

Non-adherence to policy (monitored by Personnel &Training dept.)

Main stakeholders affected

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

Staff:

All staff

Service users:

n/a

Other public sector organisations:

n/a

Voluntary/community/trade unions:

S75 representative groups; Trade union representatives

Other, please specify:

Other policies with a bearing on this policy

What are they and who owns them?

Personnel and Training Dpt Polices: Bereavement Leave Policy, Maternity Policy, Parental Leave Policy, Time off for Dependents Policy, Diversity and Equal Opportunities Policy

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 relevant Section 75 categories.

Section 75 Category	Details of Evidence/Information
All sections	Parental Bereavement Leave Regulations (N.I) 2023 Statutory Parental Bereavement Pay (General) Regulations (N.I) 2023 CIPD Research NI Direct Research Labour Relations Agency: PBL and PBP frequently asked questions March 2023

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
Racial groups	Staff are made up of diverse racial groups – we do not anticipate that there will be any specific impacts and the policy is available in alternative formats on request for accessibility.
Sex	Women make up 80% of our workforce. Female staff are more likely to be the primary caregivers. It is more likely that female staff will utilise or be impacted more by the policy.
Disabled and not disabled	The policy is available in alternative formats on request for accessibility.
Religion	Staff are made up of diverse religious groups and we acknowledge that different cultures respond to death in significantly different ways. The Association will not however, disproportionately favour a group to the disadvantage of

	colleagues with different (or no) religious beliefs in respect of time off to attend a religious ceremony.
Political opinion	We do not anticipate that there will be any specific impacts.
Marital status	We do not anticipate that there will be any specific impacts.
Sexual orientation	We do not anticipate that there will be any specific impacts.
Men and women generally	We do not anticipate that there will be any specific impacts.
Persons with dependents and persons without	We do not anticipate that there will be any specific impacts.

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 policy maker should consider their answers in relation to questions 1-4.

1. If the conclusion is **none** in respect of all of the Section 75 categories, then you may decide to screen the policy out. If a policy is 'screened out', you should give details of the reasons for the decision taken.

2. If the conclusion is **major** in respect of one or more of the Section 75 equality of opportunities and/or good relations categories, then consideration should be given to subjecting the policy to an EQIA.

3. If the conclusion is **minor** in respect of one or more of the Section 75 categories, then consideration should still be given to proceeding with an EQIA, or to measures to mitigate the adverse impact; or the introduction of an alternative policy to better promote quality 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 hence it would be appropriate to conduct an EQIA;
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 among 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 earlier evidence, consider and comment on the likely impact on equality of opportunity / good relations for those affected by this policy, by applying the following screening questions and the 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 grounds? **Minor/Major/None**		
Section 75 Category	**Details of Policy Impact**	**Level of Impact? Minor/Major/None**
Religious belief	None	None
Political opinion	None	None
Racial / ethnic 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

2 Are there opportunities to better promote equality of opportunity for people within any of the Section 75 categories?		
Section 75 Category	If **Yes**, provide details	If **No**, provide reasons
Religious belief	Support in terms of leave will be given to any employee who make their line manager aware of their needs in relation to a religious practice relevant to adopting this policy	
Political opinion	None	
Racial / ethnic group	The policy allows for discretion and encourages discussion with managers where staff members may need further time off. Other leave options will be considered sympathetically which may have some impact on employees from minority ethnic groups whose child may live abroad with family. The policy may raise awareness of how a staff members religious/ethnic group impacts on the bereavement process.	
Age	None	
Marital status	None	None
Sexual orientation	None	None
Men and women generally	The policy will positively impact both men and women who are “bereaved parents”	
Disability	The provision of time off and pay (where staff are eligible) will benefit staff members mental health.	
Dependants		

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	The policy may raise awareness of how a staff members religious belief impacts on the bereavement process.	Minor (positive)
Political opinion	None	None
Racial group	The policy may raise awareness of how a staff members race impacts on the bereavement process.	Minor (positive)

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	The policy may raise awareness of how a staff members religious belief impacts on the bereavement process	
Political opinion	No	
Racial group	The policy may raise awareness of how a staff members religious belief impacts on the bereavement process	

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

In light of your answers to the previous questions, do you feel that the policy should: (please underline one):

1. Not be subject to an EQIA (with no mitigating measures required)

2. Not be subject to an EQIA (with mitigating measures /alternative policies)

3. Not be subject to an EQIA at this time

4. Be subject to an EQIA

If answering 1. or 2. (i.e. not be subject to an EQIA), please provide details of the reasons why:

Policies are largely designed to ensure legal compliance with the relevant employment legislation.

If answering 2. (i.e., not be subject to an EQIA), in what ways can identified adverse impacts attaching to the policy be mitigated or an alternative policy be introduced?

In light of these revisions, is there a need to re-screen the revised/alternative policy at a future date? YES / NO

n/a

If answering 3. or 4. (i.e. to conduct an EQIA), please provide details of the reasons:

n/a

Timetabling and Prioritising EQIA

If answering 3. or 4., is the policy affected by timetables established by other relevant public authorities?

If YES, please provide details:

n/a

Please answer the following questions to determine priority for timetabling the EQIA. 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 EQIA.

Priority criterion	Rating (1-3)
Effect on equality of opportunity and good relations	
Social need	
Effect on people's daily lives	
Relevance to a public authority's functions	

Note: The Total Rating Score should be used to prioritise the policy in rank order with other policies screened in for EQIA. This list of priorities will assist you in timetabling the EQIA. Details of your EQIA timetable should be included in the quarterly Section 75 report.

Proposed date for commencing EQIA: _____

Any further comments on the screening process and any subsequent actions?

Monitoring

Effective monitoring will help identify any future adverse impacts arising from the policy which may lead you to conduct an EQIA, as well as help with future planning and policy development. You 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, then you should monitor more broadly than for adverse impact (See Benefits, P.9-10, paras 2.13 – 2.20 of the Monitoring Guidance).

Please detail proposed monitoring arrangements below:

Revised on a 3-yearly basis and amended policy presented at Board level.

Approval and Authorisation

Screened by:	**Position/Job Title**	**Date**
Jackie Kelly	Personnel Manager	23.11.23
Approved by:		
Elaine Taylor	Director of P&T	01.07.24

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 your website as soon as possible following completion and made available on request.