

Document Type: PROCEDURE		Unique Identifier: CORP/PROC/482
Title: Equality Analysis		Version Number: 4
		Status: Ratified
Target Audience: Trust Wide		Divisional and Department: Human Resources
Author / Originator and Job Title: Tina Daniels, Equality and Diversity Lead		Risk Assessment: Not Applicable
Replaces: Version 3 Equality Impact Assessment Process CORP/PROC/482	Description of amendments:	
Validated (Technical Approval) by: Equality Diversity Steering Group	Validation Date: 03/06/2015 10/05/2016	Which Principles of the NHS Constitution Apply? 1 3, 4 and 5
Ratified (Management Approval) by: Joint Negotiating Consultative Committee	Ratified Date: 21/06/2016	Issue Date: 21/06/2016
<i>Review dates and version numbers may alter if any significant changes are made</i>		Review Date: 01/05/2019

Blackpool Teaching Hospitals NHS Foundation Trust aims to design and implement services, policies and measures that meet the diverse needs of our service, population and workforce, ensuring that they are not placed at a disadvantage over others. The Equality Impact Assessment Tool is designed to help you consider the needs and assess the impact of your policy in the final Appendix.

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1 PURPOSE

The aim of this procedure is to assist any member of staff in understanding what an Equality Analysis is and how to carry one out on any policy, procedure, guideline, scheme, strategy, business proposal, building development, new service, a change to service provision, cessation of a service, closure of a site / facility, patient information leaflet etc. in order to comply with the requirements of the Equality Act 2010.

2 TARGET AUDIENCE

This procedure will apply to all staff employed under a contract of service by the Blackpool Teaching Hospitals NHS Foundation Trust.

3 PROCEDURE

3.1 Background

Carrying out equality analysis is a key requirement of the Equality Act 2010 that applies to all public organisations. New legislation states we have to move towards a general or single equalities scheme in line with best practice. This procedure will facilitate the equality analysis of each of the current seven key protected characteristics of equality, namely; race / ethnicity, gender, gender identity (or reassignment) disability, age, sexuality and faith / religion covered by current legislation. This procedure also covers two additional characteristics, carers and human rights, which NHS Employers have included under equality and diversity.

Equality Analyses (EAs) will help us make sure that our services are accessible to everyone and that we do not discriminate against anyone.

This Equality Analysis procedure will help staff to assess the impact of policies, procedures etc. and on services the Trust provides to different sections of our community and help us serve everyone according to their circumstances and needs. Once the initial analysis has been completed and shows there is no negative or adverse impact it must be signed off by the Manager for the team or work area to confirm that no full analysis is required.

A full equality analysis is only necessary where the policy, procedure, service etc. is a major one in terms of scale or significance for the Trust's activities or a clear indication that although the policy is minor, it is likely to have a negative, or adverse, impact on different sections of our community.

EAs are **NOT** optional and we **must** undertake them.

A template has been provided which will help staff to think about some of the questions they must consider when carrying out Equality Analysis.

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3.2 What is an Equality Analysis?

The process of conducting an Equality Analysis should not be seen as the completed package. It should be recognised that the aim of the assessment is the promotion of equality of opportunity and therefore implementing the actions contained in the resulting Action Plan is of paramount importance.

An Equality Analysis is a process that is similar to a service plan and enables managers to arrange resources and identify strategies in order to meet the aims of a policy or service, etc. It involves using data to determine if a service is potentially discriminatory or is failing to promote equality for different members of the community.

The process needs to identify people who will be at risk of discrimination or unfavourable treatment. This could include:

- Women and men.
- People with disabilities.
- People of different ethnic groups.
- People of different ages.
- People of different sexual orientations.
- People who have changed their gender from that as at birth.
- People with different religions or beliefs including those who do not have a religion or belief.
- People with caring responsibilities.
- And others.

3.3 Why carry out an Equality Analysis?

Carrying out an Equality Analysis is a way of finding out whether a current or proposed policy affects different groups of people in different ways. By undertaking an EA we are able to:

- Take into account the needs, circumstances and experiences of those who are affected by our policies.
- Identify actual and potential inequalities of outcomes.
- Consider other ways of achieving the aims of the policies.
- Increase public confidence in the fairness of our policies.
- Help develop better policies and accessible services for our community.
- Recognise the ethnic needs of our community and offer culturally sensitive services.

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3.4 Equality Analysis and Service Plans

Service plans are usually adapted in response to any problems highlighted in reviews. Similarly an Equality analysis is designed to review each policy, service and function and to check its effect upon the groups and individuals for which it is designed.

From the Equality Analysis, staff should have an idea of whether their policy or service achieves:

- An equality of outcome for the targeted groups.
- Discriminatory practices are not operating within the service.

Similar to service planning, managers need to know for whom the service is provided and plan for its further usage with an equalities perspective to it. For example, what adjustments does the service have to take into account, to ensure that users do not encounter barriers to access it?

3.5 Who needs to undertake the analysis?

Associate Directors of Operations, Divisional / Departmental Heads, or equivalent, must ensure that their staff undertake EAs with advice from their Divisional Equality and Diversity Champion.

The Trust's Equality and Diversity Lead will provide training and guidance regarding the EA process. Upon completion of the Equality Analysis, the Manager will assess whether there is a clear audit trail and that the Equality Analysis has been undertaken effectively.

The assessments need to be conducted by a small team of 2 to 3 people, led by the manager responsible for writing the policy / procedure etc., who have in-depth knowledge of the policy and how effective it is in practice. An example of an assessment team for an initial and full assessment would be:

- the staff responsible for the development of the policy.
- staff involved in the administration of the policy.
- staff responsible for the delivery of the policy.

Outcomes of the assessment process must be recorded on the EA form as part of the process and attached to the policy on completion, along with the Action Plan arising from the full equality analysis.

3.6 Monitoring of Equality Analysis

The Trust's Executive lead for Equality and Diversity together with the members of the Trust's Equality Diversity and Human Rights Steering Group, will monitor progress of any EA action plans. The Chief Executive through the lead Executive will monitor compliance of the EAs in the Trust. The lead Executive will:

- Highlight the key theme in the Action Plans.

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- Report these on a quarterly basis to the Equality Diversity & Human Rights Steering Group.
- Report these on a monthly basis to the Trust Board.
- Present the reports on a six monthly period to the Trust Board and Equality Diversity and Human Rights Steering Group.
- Arrange for audits to be conducted annually and reported in the annual report.

The Equality Diversity and Human Rights Implementation Group will support the consultation process and will report on a quarterly basis, on the number of assessments carried out and their outcomes.

3.7 Initial Equality Analysis

3.7.1 How is an equality analysis carried out?

The key steps of the process can be summarised as follows:

- Identify and agree what policy is being assessed and who will lead and carry out the equality analysis;
- Identify the aims and objectives of the policy;
- Examine the evidence that already exists - available data and research;
- Assess the impact of the policy across different protected characteristics of equality;
- Consider measures which might instigate any adverse impact; and alternative policies which might better achieve the promotion of equality of opportunity and minimise discrimination or disadvantage;
- Assess the need for any further research or consultation to examine the impact on diverse groups;
- Make a decision about whether to review the policy or replace with a new policy;
- Arrange to monitor and review how the policy works;
- Publish results including summaries of the EA reports, distribute them widely and make more detailed reports available to those who ask for them.

Once the initial Equality Analysis (see Appendix 1) is complete and providing it shows no adverse / negative impacts, the form should be signed by the staff that carried out the assessment and the manager for the area. The manager's signature will confirm that there is no full analysis required. A copy of the initial analysis will be kept with the policy / procedure etc. and a copy will be attached to the policy / procedure etc. to which it refers and sent to the Procedural Document and Leaflet Coordinator.

If insufficient data exists on the intranet, you will need to seek further information by consulting with the community / local diversity groups etc. (see Step 2 Gather Data for further suggestions).

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3.8 Full Equality Analysis

The full Equality Analysis (see Appendix 2) will build on the analysis of the initial Equality Analysis and therefore, in the light of consultation, will expand upon research and data collection. It will also state clear recommendations and objectives in relation to changes or amendments required to ensure equitable practice and which can be used as the basis to form the action plan.

3.8.1 Step 1: Screening the Policy

Identify the objective of the policy. Who is the target audience or who should benefit from the policy / service? It should be used to inform the author/s as to whether or not further and more in-depth analysis is required.

3.8.2 Step 2: Gather data

Who is using our services i.e. what % take up of the service / policy are categorised as white, ethnic minority (including Romanies), gay, lesbian, transgender, older, younger, with or without a disability, female, male, homeless, socio economic background etc.

This stage requires getting available research findings. Possible sources include:

- Demographic data and other statistics such as census findings.
- Survey data (Patient and Staff).
- Ethnic and other monitoring data.
- One-off data-gathering exercises and complaints, feedback from Public and Patient Involvement, Patient Liaison Service, etc.
- Specially commissioned research or recognised health issues affecting specific sections of the community.
- Comparisons between similar policies in our own or other public authorities.
- Faith groups / Chaplaincy.
- Statistics.
- Census data.
- Labour force statistics.
- Education.
- Health.
- Focus groups.
- Welfare / Occupational Health.
- Employment data.
- Recruitment – panel feedback, applicants, appointments.
- Training – needs analysis, attendance, feedback, evaluation of applications.
- Race Equality Council.

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- Council for Ethnic Minority Voluntary Organisations.
- Partners – benchmarking.
- Audits – internal.
- Trade unions.
- Contactor feedback.
- Staff (network groups).
- Service users.
- Exit interview feedback.
- Discipline and Grievance information.
- Progress on targets.
- Local Action Groups and Plans.
- Community Forums.
- Neighbourhood Partnerships.
- Strategic Partners.

If insufficient data exists you will need to consult with the community, for example the underrepresented group, groups represented at the Trust’s Equality Diversity and Human Rights Steering Group, Council Group, Public Health Departments. Some information can be found on the Equality and Diversity page of the Knowledge Management site. You can also request information on data from the Electronic Staff Record (ESR) system via the ESR Manager if necessary by using the relevant request form.

3.8.3 Step 3: Assessing the Impact

What does the data tell you?

What groups are satisfied, dissatisfied, under-represented, over-represented or not represented?

- Are there legitimate reasons for variations?
- Could the service be perceived as discriminatory? E.g. does the lifestyle or ability of an individual mean that they have additional forms to complete or specified procedures that no-other group has to encounter?
- Can differences in procedure be justified other than to aid administration? OR
- Are we unintentionally penalising people because they have particular needs?
- If there is no evidence of adverse or negative impact, proceed to have the policy signed off.
- If there is evidence of adverse or negative impact proceed to step 4.

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3.8.4 Step 4: If there is Evidence of Adverse or Negative Impact, consider alternative policies

- What do you need to develop or change in the policy or service to make sure that people's different circumstances do not act as a barrier to using the service?
- Consider the environment, language issues, cultural issues, images used, access (physical and sensory disability). Are these appropriate?
- On gender issues, men and women may perceive the service differently. Are transgender people given an opportunity to include their specific needs?

3.8.5 Step 5: Consultation

- Given the data concerned, do we need to consult with the community to find out if our proposals are likely to improve the quality of service provision?
- The Equality and Diversity Lead can offer advice on how to achieve this.

3.8.6 Step 6: Making decisions after the Equality Analysis and Consultation

- Decisions must logically flow from evidence gathered and reflect consultation.
- Decide whether to develop or leave unchanged the service / policy.
- Decisions may show what will be done to enable the service / policy to be as inclusive as intended.
- If an adverse impact has been assessed, what decisions need to be taken to counteract discrimination, or include sections of the community that may be currently under-presented.
- What are the resource/financial implications of decisions taken?

3.8.7 Step 7: On-going Review; Arrange to monitor and review how a policy is working

- Set a date to review decisions made and how the policy is working.
- Identify how you will measure success.
- After the review, is there still an adverse impact being identified? If yes, undertake a further Equality Analysis or develop an action plan and schedule a further review date.

3.8.8 Step 8: Publish Results

- Ensure there is an audit trail for the Equality Analysis process.
- Produce a summary report of the EA.
- Lodge the action plan report with the Equality Diversity and Human Rights Steering Group who will establish arrangements to publish and consult on it.

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3.8.9 Step 9: Action Plan

Include the action plan (see Appendix 3) in departmental plan and incorporate into the Equality and Diversity Action Plan.

Please seek support from the Equality Diversity and Human Rights Implementation Group or the Equality and Diversity Lead in the event of problems or obstacles.

3.9 Equality Analysis Forms

An initial screening form contained in Appendix 1 is to be used in the first instance to assess if a full equality analysis is necessary for which another form is provided in Appendix 2.

Please use these forms for all Equality Analysis on new and existing policies, services, buildings etc. Completed EAs must be kept with the procedural document, and electronic copies sent to the relevant Equality and Diversity Champion for your division and to the Procedural Document and Leaflet Coordinator. Completed EAs will also be published on the Trust's website along with the policy it refers to.

3.10 Guidance on Completing the EA Forms

The following questions may help to provide an early steer for the initial chosen Equality Analysis level. In addition to completing Appendix 1, please consider the following questions to inform your decisions and actions.

- What is the aim of the policy?
- Are their associated objectives of the policy? If so what are these?
- Who defined the policy need?
- Who implemented the policy or who is responsible for its implementation?
- What are the outcomes of the policy?
- Who benefits from these outcomes?
- In what ways are these people intended to benefit?
- How do these outcomes relate to other policies?
- Are there other groups which might be expected to benefit from this policy or that the policy could adversely affect?
- Is the policy shared with any other organisations?

Helpful questions are contained within the full EA form for ease of reference. It is important to recognise that the 'General Duty' under the Race Relations (Amendment) Act 2000 applies to all policies. It also states that those policies shared with other organisations or public authorities must be subject to the same equality analysis and that shared arrangements to carry out this obligation must be in place.

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3.10.1 What should you be looking for in an assessment?

An assessment needs to be based on relevant data and sufficient analysis to enable the decision-maker to understand the equality implications of a decision and any alternative options or proposals.

As with everything, proportionality is a key principle. Assessing the impact of a major financial proposal is likely to need significantly more effort, and resources dedicated to ensuring effective consultation and involvement, than a simple assessment of a proposal to save money by changing staff travel arrangements.

3.11 Using EAs and Equality Duties for Fair Financial Decisions

There is no prescribed format for an EA, however the following questions and answers provide further guidance to assist you in determining whether you consider that an EA is robust enough to rely on when making financial decisions:

3.11.1 Is the purpose of the financial proposal clearly set out?

A robust EA will set out the reasons for the change; how this change can impact on equality groups, as well as who it is intended to benefit; and the intended outcome. You should also think about how individual financial proposals might relate to one another. This is because a series of changes to different policies or services could have a severe impact on particular equality groups. Joint working with your public authority partners will also help you to consider thoroughly the impact of decisions on the people you collectively serve.

3.11.2 Has the EA considered available evidence?

Public authorities should consider the data and research already available locally and nationally. The assessment should be underpinned by up-to-date and reliable information about the different groups the proposal is likely to affect. A lack of data is not a sufficient reason to conclude that there is no impact.¹

3.11.3 Have those likely to be affected by the proposal been consulted and involved?

Involvement and consultation are crucial to the EA process. There is an explicit requirement to consult different ethnic groups under race relations law in the context of an EA but, as a matter of best practice and in order to improve your evidence, applying the same principle to other groups should be considered. No-one can give you a better insight into how proposed changes will affect, for example, disabled people, than disabled people themselves.

¹ Where there is no detailed quantitative data available, there may often be national statistics or qualitative studies on the relevant policy area. These can be supplemented by local informal consultation. Providing evidence that your organisation has looked for data will improve the quality and transparency of your EA. For longer-term monitoring of impact, you can include your plans to collect data in the EA action plan.

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3.11.4 Have potential positive and negative impacts been identified?

It is not enough to state simply that a policy will affect everyone equally; there should be a more in-depth consideration of available evidence to see if particular equality groups are more likely to be affected than others. Equal treatment does not always produce equal outcomes; sometimes authorities will have to take specific steps for particular groups to address an existing disadvantage or to meet differing needs.

3.11.5 What course of action does the EA suggest to take? Is it justifiable?

The EA should clearly identify the option(s) chosen, and their potential impacts, and document the reasons for this decision. There are four possible outcomes of an EA. More than one may apply to a single proposal:

- **Outcome 1: No major change required** when the EA has not identified any potential for discrimination or adverse impact and all opportunities to promote equality have been taken.
- **Outcome 2: Adjustments to remove barriers identified by the EA or to better promote equality.** Are you satisfied that the proposed adjustments will remove the barriers identified?
- **Outcome 3: Continue despite having identified some potential for adverse impact or missed opportunities to promote equality.** In this case, the justification should be included in the EA and should be in line with the duty to have 'due regard'. For the most important relevant policies, compelling reasons will be needed. You should consider whether there are sufficient plans to reduce the negative impact and/or plans to monitor the actual impact, as discussed below.
- **Outcome 4: Stop and rethink** when an EA shows actual or potential unlawful discrimination.²

3.11.6 Are there plans to alleviate any negative / adverse impact?

Where the assessment indicates a potential negative impact, consideration should be given to means of reducing or mitigating the negative effects. This will in practice be supported by the development of an action plan to reduce impact that identifies the responsibility for delivering each action and the associated timescales for implementation. Considering what action you could take to avoid any negative impact is crucial, to reduce the likelihood that the difficult decisions you will have to take in the near future do not create or perpetuate inequality (Use Appendix 3).

² The relevant Codes of Practice and guidance on the public sector duties provide information about what constitutes unlawful discrimination. More information is available on the Commission's website <http://www.equalityhumanrights.com>.

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3.11.7 Are there plans to monitor the actual impact of the proposal?

Although an EA will help to anticipate a proposal's likely effects on different communities and groups, in reality the full impact of a decision will only be known once it is introduced. It is therefore important to set out arrangements for reviewing the actual impact of the proposals once they have been implemented.

3.11.8 What happens if you don't properly assess the impact of relevant decisions?

If you have not carried out an assessment of the proposal, or have not done so thoroughly, you risk leaving yourself open to legal challenges, which are both costly and time-consuming. Recent legal cases have shown what can happen when authorities do not consider their equality duties when making decisions.³

However, the result can often be far more fundamental than a legal challenge. If people feel that an authority is acting high-handedly or without properly involving its service users or employees, or listening to their concerns, they are likely to become disillusioned with you. Above all, authorities which fail to carry out robust assessments risk making poor and unfair decisions that could discriminate against particular equality groups and perpetuate or worsen inequality.

As part of its regulatory role to ensure compliance with the equality duties, the Commission will monitor financial decisions with a view to ensuring that these have been taken in compliance with the equality duties and have taken into account the need to mitigate impact where possible.

3.12 Do you need further help?

If so, please contact the Trusts Equality and Diversity Lead if you require further guidance or information. You can do so in the following ways:

- Email: tina.daniels@bfwhospitals.nhs.uk
- Telephone: (01253) 957375

Any alterations to this document will be carried out by the above members. If you have any comments or suggestions, please send these directly to the Trust's Equality and Diversity Lead.

³ See relevant case law on our webpage at <http://www.equalityhumanrights.com/financialdecisions>

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4 ATTACHMENTS	
Appendix Number	Title
Appendix 1	Initial EA Form
Appendix 2	Full EA Form
Appendix 3	EA Action Plan Summary
Appendix 4	EA Checklist
Appendix 5	List of Human Rights
Appendix 6	Equality Analysis example
Appendix 7	Equality Analysis Tool

5 PROCEDURAL DOCUMENT STORAGE (HARD AND ELECTRONIC COPIES)
Electronic Database for Procedural Documents
Held by Procedural Document and Leaflet Coordinator

6 LOCATIONS THIS DOCUMENT ISSUED TO		
Copy No	Location	Date Issued
1	Intranet	21/06/2016
2	Wards, Departments and Service	21/06/2016

7 OTHER RELEVANT / ASSOCIATED DOCUMENTS	
Unique Identifier	Title and web links from the document library
CORP/GUID/004	Patients with Impaired Vision http://fcsharepoint/trustdocuments/Documents/corp-guid-004.doc
CORP/GUID/007	Homelessness http://fcsharepoint/trustdocuments/Documents/CORP-GUID-007.doc
CORP/GUID/009	Patients with Substance Misuse Problems or Addictions http://fcsharepoint/trustdocuments/Documents/CORP-GUID-009.doc
CORP/GUID/010	Adults with Mental Health Problems in a General Hospital Setting and Referral to Mental Health Liaison Team http://fcsharepoint/trustdocuments/Documents/CORP-GUID-010.docx
CORP/GUID/039	Caring for People with Learning Disabilities http://fcsharepoint/trustdocuments/Documents/CORP-GUID-039.doc
CORP/GUID/308	Care of Transgender Patients http://fcsharepoint/trustdocuments/Documents/CORP-GUID-308.doc
CORP/POL/011	Attendance Management Policy http://fcsharepoint/trustdocuments/Documents/CORP-POL-011.docx
CORP/POL/202	Criminal Records Bureau Disclosures http://fcsharepoint/trustdocuments/Documents/CORP-POL-202.doc
CORP/POL/206	Equality and Diversity Policy http://fcsharepoint/trustdocuments/Documents/CORP-POL-206.docx

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7 OTHER RELEVANT / ASSOCIATED DOCUMENTS	
Unique Identifier	Title and web links from the document library
CORP/POL/222	Employing People with a Disability http://fcsharepoint/trustdocuments/Documents/CORP-POL-222.doc
CORP/POL/239	Gender Reassignment Support in the Workplace Policy http://fcsharepoint/trustdocuments/Documents/CORP-POL-239.docx
CORP/PROC/001	Development and Management of Procedural Documents http://fcsharepoint/trustdocuments/Documents/CORP-PROC-001.docx
CORP/PROC/022	Interpreting Services for those patients whose first language is not English and those with Hearing Impairments http://fcsharepoint/trustdocuments/Documents/CORP-PROC-022.docx
CORP/PROC/057	Creating Patient Information for Patients / Relatives / Carers http://fcsharepoint/trustdocuments/Documents/CORP-PROC-057.docx
CORP/PROC/208	Prevention of Bullying and Harassment Procedure http://fcsharepoint/trustdocuments/Documents/CORP-PROC-208.docx
CORP/PROC/426	Management of Mixed Sex Wards http://fcsharepoint/trustdocuments/Documents/corp-proc-426.doc
CORP/PROC/636	Disciplinary and Appeal Procedure http://fcsharepoint/trustdocuments/Documents/CORP-PROC-636.docx
CORP/STRAT/001	Equality and Diversity and Human Rights Strategy http://fcsharepoint/trustdocuments/Documents/CORP-STRAT-001.doc

8 SUPPORTING REFERENCES / EVIDENCE BASED DOCUMENTS	
References In Full	
Age UK Information Guides and Factsheets – March 2011	
Better Together – A guide for people in the health service on how you can build more cohesive communities- ICOCO (2008)	
Beyond procurement: connecting Procurement practice to patients – DH (2007)	
Beyond We Care – NBCW (2008)	
Carers UK – www.carersuk.org	
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8 SUPPORTING REFERENCES / EVIDENCE BASED DOCUMENTS	
References In Full	
Equality and Human Rights Commission. Available: http://www.equalityhumanrights.com/ . Last accessed 08/07/2015.	
Exploring the needs, views and experiences of South Asian Mental Health Carers in Blackburn with Darwen – Community Links (2007)	
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Positively Diverse (DH Publication)	
Putting People first: equality and diversity matters CSCI (2008)	
Putting People first: equality and diversity matters-3 CSCI (2009)	
Religion and Belief – A practical Guide for the NHS – DH (2009)	
Secretary of State Report on Disability Equality – Health Care Services – DH (2008)	
Sexual Orientation – A practical Guide for the NHS – DH (2009)	
The Gender and Access to health Service Study final report – DH (2008)	
The health needs of wider BME Communities in Blackburn with Darwen – NHS Blackburn with Darwen (2008)	
Trans – A practical Guide for the NHS – DH (2008)	
We Care Too – NBCW (2002)	

9 CONSULTATION / ACKNOWLEDGEMENTS WITH STAFF, PEERS, PATIENTS AND THE PUBLIC		
Name	Designation	Date Response Received
	Staff Side	
	Equality Diversity & Human Rights Steering Group	
	Staff E&D Network	

10 DEFINITIONS / GLOSSARY OF TERMS	
EAs	Equality Analyses
ESR	Electronic Staff Record
HR	Human Resources
Procedural document	Refers to policy, procedure, guideline, scheme, strategy or any other Trust document which is written in conjunction with the aforementioned documents

11 AUTHOR / DIVISIONAL / DIRECTORATE MANAGER APPROVAL			
Issued By	Tina Daniels	Checked By	
Job Title	E&D Lead	Job Title	JNCC
Date	May 2015	Date	June 2016

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APPENDIX 1: INITIAL EQUALITY ANALYSIS FORM				
Department	Service or Policy	Date Completed:		
GROUPS TO BE CONSIDERED				
Deprived communities, homeless, substance misusers, people who have a disability, learning disability, older people, children and families, young people, Lesbian Gay Bi-sexual or Transgender, minority ethnic communities, Gypsy/Roma/Travellers, women/men, parents, carers, staff, wider community, offenders.				
EQUALITY PROTECTED CHARACTERISTICS TO BE CONSIDERED				
Age, gender, disability, race, sexual orientation, gender identity (or reassignment), religion and belief, carers, Human Rights and social economic / deprivation.				
QUESTION	RESPONSE		IMPACT	
	Issue	Action	Positive	Negative
What is the service, leaflet or policy development? What are its aims, who are the target audience?				
Does the service, leaflet or policy/ development impact on community safety • Crime • Community cohesion				
Is there any evidence that groups who should benefit do not? i.e. equal opportunity monitoring of service users and/or staff. If none/insufficient local or national data available consider what information you need.				
Does the service, leaflet or development/ policy have a negative impact on any geographical or sub group of the population?				
How does the service, leaflet or policy/ development promote equality and diversity?				
Does the service, leaflet or policy/ development explicitly include a commitment to equality and diversity and meeting needs? How does it demonstrate its impact?				
Does the Organisation or service workforce reflect the local population? Do we employ people from disadvantaged groups				
Will the service, leaflet or policy/ development i. Improve economic social conditions in deprived areas ii. Use brown field sites iii. Improve public spaces including creation of green spaces?				
Does the service, leaflet or policy/ development promote equity of lifelong learning?				
Does the service, leaflet or policy/ development encourage healthy lifestyles and reduce risks to health?				
Does the service, leaflet or policy/ development impact on transport? What are the implications of this?				
Does the service, leaflet or policy/development impact on housing, housing needs, homelessness, or a person's ability to remain at home?				
Are there any groups for whom this policy/ service/leaflet would have an impact? Is it an adverse/negative impact? Does it or could it (or is the perception that it could exclude disadvantaged or marginalised groups?				
Does the policy/development promote access to services and facilities for any group in particular?				
Does the service, leaflet or policy/development impact on the				

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APPENDIX 1: INITIAL EQUALITY ANALYSIS FORM				
environment				
<ul style="list-style-type: none"> • During development • At implementation? 				
ACTION:				
Please identify if you are now required to carry out a Full Equality Analysis		Yes	No	(Please delete as appropriate)
Name of Author:		Date Signed:		
Signature of Author:				
Name of Lead Person:		Date Signed:		
Signature of Lead Person:				
Name of Manager:		Date Signed:		
Signature of Manager				

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APPENDIX 2: FULL EQUALITY ANALYSIS FORM

Equality Analysis

Title of Policy/development or Function(inc leaflets):		Directorate/Department:	
Name of person(s) completing Full Equality Analysis:		Contact no.:	

- A. For each of the following assessments please remember to consider is this policy and/or function sensitive to people on the grounds of their age, race, gender, gender identity (or reassignment), disability, religion or belief, sexual orientation, marriage and maternity, carers, Human Rights and socio economic/deprivation (Protected Characteristics). (Deprived communities, homeless, substance misusers, people who have a disability, learning disability, older people, children and families, young people, Lesbian Gay Bi-sexual or Transgender, minority ethnic communities, Gypsy/Roma/Travellers, women/men, parents, carers, staff, wider community, offenders.)
- B. The checklists below will help you to see any strength and/or highlight improvements required to ensure that the policy/procedure is compliant with equality legislation.

1. Who will be affected by the policy/procedure/strategy/service/development/project/function? Who is intended to benefit from it and how?

Ask yourself: Who are the target user/customer groups? Who will it affect directly and indirectly? What do you already know about these groups in relation to the policy/procedure/strategy/service/project/function?

2. What involvement has there been with the people that might be affected directly or indirectly by the policy/procedure/strategy/service/project/function?

Ask yourself: Who have we involved and how? Who else needs to be involved at this stage? What information do we have to support the development of the policy/strategy/project/development/function in relation to our duty to promote equality? Consider groups that you may have consulted within Blackpool Fylde & Wyre NHS Trust and any external organisations.

3. What data and information have you gathered or have available to support the equality analysis?

Ask yourself: What data and evidence have you available? E.g. Statistics or demographic data; recent research findings; the results of consultations/ surveys; analysis of complaints; results of equality monitoring data. Has your data reflected equality and diversity issues? Do you have enough to proceed at this stage? (if you have insufficient data to help you to complete this section then probably the first actions in your action plan will be to gather further data)

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APPENDIX 2: FULL EQUALITY ANALYSIS FORM

4. Check for DIRECT and INDIRECT discrimination against any of the following groups of staff or service users:

Question: Is there any evidence that the following groups and individuals from these groups have different needs in relation to this policy or function?		Positive Impact	Negative Impact	Action Required		Priority High Medium Low	Reason/Comment
				Yes	No		
A	Age?						
B	Gender (male/female)?						
C	Learning Difficulties/Disability or Cognitive Impairment?						
D	Mental Health Need?						
E	Sensory Impairment /Physical Disability??						
F	Gender Identity (Gender Reassignment)?						
G	Race, Ethnicity, Religion, Language or Culture?						
H	Religious, Spiritual belief (including other belief)?						
I	Sexuality/Sexual Orientation (Lesbian, Gay & Bi-sexual)?						
J	Any Long Term Medical Conditions?						
K	Carers?						

If 'YES' is answered to any of the above items, the policy or function may be considered discriminatory and require review and further work to ensure compliance with legislation.

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APPENDIX 2: FULL EQUALITY ANALYSIS FORM

5. Check for DIRECT and INDIRECT discrimination against any of the following groups of staff or service users:

Question: Does your policy or function contain any conditions or requirements which are applied equally to everyone, but disadvantage particular person's because they cannot comply due to:	Positive Impact	Negative Impact	Action Required		Priority High Medium Low	Reason/Comment
			Yes	No		
A Age?						
B Gender (male/female/transgender)?						
C Learning Difficulties/Disability or Cognitive Impairment?						
D Mental Health Need?						
E Sensory Impairment/ Physical Disability?						
F Gender Identity (Gender Reassignment)?						
G Race, Ethnicity, Religion, Language or Culture?						
H Religious, Spiritual belief (including other belief)?						
I Sexuality/Sexual Orientation (Lesbian, Gay & Bi-sexual)?						
J Any Long Term Medical Conditions?						
K Carers?						

If 'YES' is answered to any of the above items, the policy or function may be considered discriminatory and require review and further work to ensure compliance with legislation.

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APPENDIX 2: FULL EQUALITY ANALYSIS FORM

6. Check for DIRECT and INDIRECT discrimination against any of the following groups of staff or service users:

Question: Does your policy or function contain any statements which may exclude employees from operating the policy or function on the grounds of:	Positive Impact	Negative Impact	Action Required		Priority High Medium Low	Reason/ comment
			Yes	No		
A Age?						
B Gender (male/female/transgender)?						
C Learning Difficulties/Disability or Cognitive Impairment?						
D Mental Health Need?						
E Sensory Impairment/ Physical Disability?						
F Gender Identity (Gender Reassignment)?						
G Race, Ethnicity, Religion, Language or Culture?						
H Religious, Spiritual belief (including other belief)?						
I Sexuality/Sexual Orientation (Lesbian, Gay & Bi-sexual)?						
J Any Long Term Medical Conditions?						
K Carers?						

If 'YES' is answered to any of the above items, the policy or function may be considered discriminatory and require review and further work to ensure compliance with legislation.

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APPENDIX 2: FULL EQUALITY ANALYSIS FORM

7. What further information do you need to collect to provide a full picture to carry out the equality analysis?

Ask yourself: What sort of data needs to be collected? Who are you going to consult with? E.g. Internal and external organisations

8. What is the summary of your equality analysis?

Ask yourself: *Who else needs to know? What outcomes are you looking for? How will you test it out?*

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APPENDIX 2: FULL EQUALITY ANALYSIS FORM

9. INDICATE WHICH GROUP(S) (IDENTIFIED AS A – J) YOUR ACTION POINT IS REFERING TO.

Consider carry out: involvement & consultation; data collection & evidence; assessment & analysis; procurement & partnerships; monitoring, evaluating & reviewing (including publishing the results). Use this form to create an action plan then summarise in Part B.

Ask yourself: What are you going to do differently as a result of this Equality Analysis? How and when are you going to consult on this action plan? Who else needs to know about this action plan? What other formats do you need to have it produced in e.g. language, Braille?

Group	Action	Outcome Measure	Who	When	Monitoring Arrangements

Review date for action plan:

NAME:		SIGNATURE:		DATE:	
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APPENDIX 3: EQUALITY ANALYSIS SUMMARY

Please list on this sheet any recommendations for action that you plan to take as a result of this Equality Analysis

ISSUE	ACTION REQUIRED	LEAD OFFICER	TIMESCALE	COSTS	COMMENTS

Sign off for Completed Plan

Authorised Manager: **Date:**

Date Copy Sent to ED & HR Steering Group: **By Whom:**

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APPENDIX 4: EQUALITY ANALYSIS CHECKLIST

This document contains a number of questions to help team leaders and managers consider as wide a range of issues as possible when conducting their Equality Analysis.

Remember that your EA report should demonstrate what you do (or will do) to make sure that your service/policy is accessible to different people and communities, not just that it can, in theory, be used by anyone.

RACE

How will you make sure that people from a wide range of backgrounds use your service?

(N.B. You may find it helpful to look at this section alongside the section on Religion and Belief as the actions are closely related). You might find the following prompts useful though you will also have actions that are particular to your service:

- How do people from minority ethnic backgrounds find out about your service? Does your printed information take account of different languages and cultures and is it easy to understand?
- Have you publicised your service among minority ethnic communities by making it available at different appropriate venues as well as visiting them and talking about your service?
- Have you decided what core information you need available in other languages if applicable?
- Do your staff members know how to access an interpreter for booking appointments or how to access telephone interpreting (in situations where it may not be possible to arrange an appropriate interpreter?) Do they also know where to get advice on material in other languages and formats?
- Do you routinely record the language that a person speaks so that you can send those letters in the correct language or ring them instead if they can't read?
- Have you put in place a procedure to record the uptake of interpreting and translated material?
- Have you thought about your assessment materials and methods and made sure that they are relevant to people from different cultures?
- Do you currently record the ethnicity of patients so that you know how well your service is being used by people from minority ethnic backgrounds?
- What actions would you undertake to ensure that your staff members are treating people from a minority ethnic background with respect and dignity?
- Have you identified any specific dietary or any religious needs of patients or any other specific requirements that you need to be sensitive to?

APPENDIX 4: EQUALITY ANALYSIS CHECKLIST

- Have your staff members received EA Training as well as Equality and Diversity Training which includes race and how they are planning to implement this in their work setting?
- Have you considered incorporating race equality objectives in staff appraisal?
- How will you mainstream these actions into the core business of your service?

Reference documents:

- Better Together – A guide for people in the health service on how you can build more cohesive communities- ICOCO (2008)
- The health needs of wider BME Communities in Blackburn with Darwen – NHS Blackburn with Darwen (2008)
- Putting People first: equality and diversity matters CSCI (2008)
- Beyond procurement: connecting Procurement practice to patients – DH (2007)
- Health Inequalities Third Report – house of commons Health Committee (2009)
- Equality Act 2010: The public sector Equality duty (2010)

RELIGION OR BELIEF

How will you welcome people from all religious backgrounds? You might find the following prompts useful though you will also have actions that are particular to your service:

- How do people from different religious backgrounds find out about your service? Is your printed information religiously appropriate / sensitive?
- Have you publicised your service among various religious communities and groups by making it available at different appropriate venues as well as visiting them and talking about your service?
- Do you currently record patients' religion in order to assist you in identifying users and non-users of your service from various religious backgrounds?
- What actions would you undertake to ensure that your staff members are treating people from different religions / beliefs / no beliefs with respect and dignity?
- Is your service religiously and culturally sensitive to meet the needs of people from various religious backgrounds? If not what approaches would you develop to address this?
- Have you identified any specific dietary or other needs related to a person's religion which you need to be sensitive to?
- Are there any other religious sensitivities you need to bear in mind, e.g. when visiting

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APPENDIX 4: EQUALITY ANALYSIS CHECKLIST

patients at home?

- If you are running an inpatient or residential service, have you thought about the prayer needs or the need for a quiet space for your patients or residents?
- Have you considered obtaining a list of various festivals to be made available to your staff members to avoid arranging appointments / visits etc. on any particular religious festivals/days / times?
- Have your staff members received training on religion and belief and how they are planning to implement this in their work setting?
- Have you considered incorporating religion and belief equality objectives in staff appraisal?
- How will you mainstream these actions into the core objectives of your service?

Reference documents:

- Religion and Belief – A practical Guide for the NHS – DH (2009)
- Better Together – A guide for people in the health service on how you can build more cohesive communities- ICOCO (2008)
- The health needs of wider BME Communities in Blackburn with Darwen – NHS Blackburn with Darwen (2008)
- Putting People first: equality and diversity matters-1 CSCI (2008)
- Putting People first: equality and diversity matters-3 CSCI (2009)
- Health Inequalities Third Report – house of commons Health Committee (2009)
- Equality Act 2010: The public sector Equality duty (2010)

DISABILITY

What will you do to make sure that people with a disability are using and benefiting from your service / policy? This includes people with a learning disability, people with long-term conditions and mental health problems, and people with physical and sensory impairments. Please remember some people may have more than one disability.

Please note, where appropriate consider the needs of people with physical, sensory impairments, mental health needs and Learning Disabilities.

You might find the following prompts useful though you will also have actions that are particular to your service:

- How do people with disabilities find out about your service, and how will you think carefully about all types of disabilities?

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APPENDIX 4: EQUALITY ANALYSIS CHECKLIST

- Does your printed information take account of communication needs of people with various disabilities and is it easy to understand?
- Have you decided what core information you need available in large print, audio tape, Braille and easy read format, well-illustrated and also in other languages? You can state that information will be available on request in the formats indicated.
- Is your service physically accessible to people with mobility problems or who use a wheelchair? Please remember to think about entrances, waiting areas, signage and car parking spaces near to the service.
- Do your staff members know how to access a sign language interpreter, or an interpreting service for deaf and hearing impaired people, how to use an Induction Loop and where to get advice on material in different formats?
- Do you routinely record the communication needs of patients with a physical or mental health condition, learning disability or sensory impairment for referring to when sending out appointments etc.?
- Have you put in place a procedure to record the uptake for sign language interpreters, appointment letters/leaflets in Braille, easy read format, illustrated and also in other languages?
- Do you currently monitor whether or not patients have a mental health condition, physical or learning disability, or sensory impairment so that you know how well your service is being used by people with a disability?
- What actions will you undertake to ensure that your staff members are treating people with a physical or mental health condition, learning disability or sensory impairment with respect and dignity?
- Is your service religiously and culturally sensitive to meet the needs of physically and learning disabled people, those suffering from a mental health condition or sensory impairment, from minority ethnic groups and all faiths? If not what approaches would you develop to approach this?
- Have your staff members received Disability Awareness Training in general and more specifically in meeting the needs of patients with a learning disability, people with a mental health condition or people with a hearing or sight impairment? How are they planning to implement this into their work setting?
- Have you thought about your assessment materials and methods and made sure that they are relevant to people with mental health conditions or physical disabilities? Checklists to be completed by the patient should be easy to understand, no jargon, illustrated and in other languages.
- Have you considered incorporating mental health or physical disability equality objectives into staff appraisal?

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APPENDIX 4: EQUALITY ANALYSIS CHECKLIST

- How will you mainstream these actions into the core objectives of your service?
- Have you thought about the support people need to access and use your service, i.e. personal care needs?
- Has your service considered people with disabilities, sensory impairments and mental health conditions arriving to use your service unaccompanied?
- Has your service considered the needs of Ambulant Disabled and those with long term conditions such as heart/lung conditions and are unable to walk long distances.
- Does your staff know how to safely evacuate people with a disability in the event of a fire and does your service have a fire procedure in place that includes evacuating disabled people?
- Has your service considered the implications for someone arriving with their Guide/Assistance Dog?
- Has your service considered personal care needs such as the need for hoists, grab rails, changing areas, sanitary bins etc.?
- Does any signage in and directing to your service meet the needs of disabled people with learning disabilities, sensory impairment, literacy problems and people from other languages, and is it possible to illustrate these signs? Also could you consider colour coded zones to make finding you easier?
- Have you given thought to the lighting used in your service area and also about the colour contrast you use? Light on dark or dark on light is best practice. Also are steps painted with white lines and handrails easy to see for people with sensory impairments?
- Does your service consider the needs of the disabled person's carers?
- When planning a service please consider that a disabled person may drive, also be a carer, parent & be in employment etc.
- When planning a service make sure that when assessing a disabled person that you also check the other checklists such as age, sexuality, gender, religion as these may also apply to them and it is very important these needs are also met.

Reference documents:

- Secretary of State Report on Disability Equality – Health Care Services – DH (2008)
- Better Together – A guide for people in the health service on how you can build more cohesive communities- ICOCO (2008)
- The health needs of wider BME Communities in Blackburn with Darwen – NHS Blackburn with Darwen (2008)

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- Health Needs of BME Disabled People in Blackburn with Darwen - NHS Blackburn with Darwen (2008)
- Putting People first: equality and diversity matters CSCI (2008)
- Exploring the needs, views and experiences of South Asian Mental Health Carers in Blackburn with Darwen – Community Links (2007)
- Health Inequalities Third Report – house of commons Health Committee (2009)
- Equality Act 2010 - Code of Practice – EHRC (Jan 2011)

GENDER and GENDER IDENTITY

If your service is for men and women, what will you do to make sure that both benefit? You might find the following prompts useful though you will also have actions that are particular to your service:

- Is it easier for either men or women to find out about and use your service, for example because of where you display leaflets or your opening times?
- If your service is for men and women, do you routinely monitor the uptake of your service with gender breakdown and take appropriate action? For example:
 - If you find that men are not accessing your services then you may consider improving the way these services are provided to men, possibly by targeting men and providing drop-in clinics at sporting events or workplaces.
 - Similarly you may consider adopting sensitive approaches to target women from different backgrounds as the services may not be appropriate for some women from particularly minority communities
- Have your staff members received Gender Equality Training and how they are planning to implement this in their work setting?
- Have you considered incorporating gender equality objectives in staff appraisal?
- How would you mainstream these actions into the core business of your service?

Reference documents:

- Trans – A practical Guide for the NHS – DH (2008)
- The Gender and Access to health Service Study final report – DH (2008)
- Health Inequalities Third Report – house of commons Health Committee (2009)
- Equality Act 2010: The public sector Equality Duty – EHRC (Aug 2010)
- Equality Act 2010 - Code of Practice – EHRC (Jan 2011)
- Equality Act 2010

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APPENDIX 4: EQUALITY ANALYSIS CHECKLIST

SEXUAL ORIENTATION

How will you give positive messages and a positive reception to people who are gay, lesbian, bisexual or transgender? You might find the following prompts useful though you will also have actions that are particular to your service:

- Does information about your service use visual images that could be people from any background or are the images mainly heterosexual couples?
- Does the language you use in your literature include reference to gay, lesbian and bisexual people?
- When carrying out assessments, do you make it easy for someone to talk about their sexuality if it is relevant, or do you assume that they are heterosexual?
- Would staff in your workplace feel comfortable about being 'out' or would the office culture make them feel that this might not be a good idea?
- Has your staff had training in Sexual Orientation and Equality and how will they put what they have learnt into practice?
- How will you make sure that staff treat lesbian, gay and bisexual people with dignity and respect?
- Have you included this area of equality in staff objectives and appraisal?
- How will you mainstream these actions into the core business of your service?

Reference documents:

- Sexual Orientation – A practical Guide for the NHS – DH (2009)
- Health Inequalities Third Report – house of commons Health Committee (2009)
- Equality Act 2010: The public sector Equality Duty – EHRC (Aug 2010)
- Equality Act 2010 - Code of Practice – EHRC (Jan 2011)
- Equality Act 2010

CARERS

- How do you identify who carers care for and how long have they been caring?
- What arrangements will need to be considered with regard to how carers might be affected by their own health?
- What arrangements will be considered to ensure extra help is given to those carers who require it?

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APPENDIX 4: EQUALITY ANALYSIS CHECKLIST

- Identify any initiatives that might improve Carer's Lives?
- Are carers recognised as a carer and is their own health and well-being taken into account?
- Do staff/carers have access to up-to-date information about services and support available that may help them in their caring role?
- Are services available to provide emotional support and relief from isolation? Do you have information to point them in the right direction?
- Are you sure that all staff are aware of family friendly policies and procedures, and where to find carers information?
- Do staff / carers know how to access Occupational Health and Staff Counsellors in confidence?
- Do you routinely provide awareness raising sessions to help needs of all staff including carers and offer information about wider services which may be available outside the PCT?
- Are you aware carers' needs may not be just work based, but physical, mental and financial?
- When doing the return to work interview following sick leave, are you able to identify any carers' needs, and do you need to provide any emotional support as well?

Reference documents:

- We Care Too – NBCW (2002)
- Beyond We Care – NBCW (2008)
- Carers UK – www.carersuk.org

AGE

If your service is open to people of all ages, how will you make sure that is used by people of all ages? You might find the following prompts useful though you will also have actions that are particular to your service:

- Is it easy for someone of any age to find out about your service and to use your service?
- Does your service make assumptions about people simply because of their age?
- Does your service give out positive messages about all ages in the leaflets and posters that it uses?

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APPENDIX 4: EQUALITY ANALYSIS CHECKLIST

- Is publicity material easy for older people to read (e.g. large print)?
- When you are recruiting staff, have you thought about age and how you can recruit from a wide range of age backgrounds?
- Do younger and older people in your staff team feel equally valued?
- Is your service easily accessible to older people (e.g. close to public transport links)?
- Do you monitor age to make sure that you are serving a representative sample of the population (or representative within your relevant age group)?
- Do any eligibility criteria for your service discriminate against older or younger people without just cause?
- What actions will you take to make sure that your staff treats people of all ages with dignity and respect?
- Have you considered including age equality into staff objectives and appraisal?
- How will you mainstream these actions into the core objectives of your service?

Reference documents:

- Health Inequalities Third Report – house of commons Health Committee (2009)
- Age UK Information Guides and Factsheets – March 2011
- Equality Act 2010: The public sector Equality Duty – EHRC (Aug 2010)
- Equality Act 2010 - Code of Practice – EHRC (Jan 2011)
- Equality Act 2010

DEPRIVATION

People living in areas of deprivation are at increased risk of social exclusion for a number of reasons:

- Low income / poverty
- Poorer services and facilities accessible to people in the area
- Discrimination against people living in deprived neighbourhoods

How will you monitor whether people from deprived areas use your service? If people from deprived areas are not using your service as much as expected, how could you target these communities?

How will you make your service accessible to people from deprived areas?

How will you ensure that people from the most deprived areas are able to benefit from your service?

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APPENDIX 4: EQUALITY ANALYSIS CHECKLIST

What barriers might people from deprived areas face when using your service and how can you overcome these barriers?

If you advise people to change their lifestyle, how can you be sensitive to low income, fear of crime and lack of local facilities and support that are experiences by those living in deprived areas?

Some people in deprived areas have lower educational attainment, how can you ensure that information about your service is appropriate to people with lower levels of education and possibly literacy problems?

Reference documents:

- Trans – A practical Guide for the NHS – DH (2008)
- Sexual Orientation – A Practical Guide for the NHS – DH (2009)
- The Gender and Access to health Service Study final report – DH (2008)
- Health Inequalities Third Report – house of commons Health Committee (2009)
- Equality Act 2010: The public sector Equality Duty – EHRC (Aug 2010)
- Equality Act 2010 - Code of Practice – EHRC (Jan 2011)
- Equality Act 2010

We acknowledge and thank Shabir Abdul at University Hospitals Aintree for kindly sharing this checklist with our Trust and Tina Daniels Blackpool Teaching Hospitals for updating it.

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APPENDIX 5: HUMAN RIGHTS ACT 1998

When carrying out an Equality Analysis the following Human Rights should be kept in mind to avoid unnecessary discrimination wherever possible:

- Article 2: Right to life
- Article 3: Rights not to be tortured or treated in an inhuman or degrading way
- Article 4: Right to be free from slavery or forced labour
- Article 5: Right to liberty
- Article 6 Right to a fair trial
- Article 7: Right to no punishment without law
- Article 8: Right to respect for private and family life, home and correspondence
- Article 9: Right to freedom of thought, conscience and religion
- Article 10: Right to freedom of expression
- Article 11: Right to freedom of assembly and association
- Article 12: Right to marry and found a family
- Article 14: Right not to be discriminated against in relation to any of the rights contained in the European Convention
- Article 1, Protocol 1: Right to peaceful enjoyment of possessions
- Article 2, Protocol 1: Right to education
- Article 3, Protocol 1: Right to free elections

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APPENDIX 6: EXAMPLE OF A COMPLETED FULL EQUALITY ANALYSIS FORM

Equality Analysis			
Title of Policy/development or Function (inc leaflets):		Directorate/Department:	Another
Name of person(s) completing Full Equality Analysis:	A.N. Other1 A.N. Other2	Contact no.:	Extension number
<p>A. For each of the following assessments please remember to consider is this policy and/or function sensitive to people on the grounds of their age, race, gender, gender identity (or reassignment), disability, religion or belief, sexual orientation, marriage and maternity, carers, Human Rights and socio economic/deprivation (Protected Characteristics). (Deprived communities, homeless, substance misusers, people who have a disability, learning disability, older people, children and families, young people, Lesbian Gay Bi-sexual or Transgender, minority ethnic communities, Gypsy/Roma/Travellers, women/men, parents, carers, staff, wider community, offenders.)</p> <p>B. The checklists below will help you to see any strength and/or highlight improvements required to ensure that the policy/procedure is compliant with equality legislation.</p>			
1. Who will be affected by the policy/procedure/strategy/service/development/project/function? Who is intended to benefit from it and how?			
<p>Ask yourself: Who are the target user/customer groups? Who will it affect directly and indirectly? What do you already know about these groups in relation to the policy/procedure/strategy/service/project/function?</p> <p>List the user/customer group affected by the policy/procedure etc State who is meant to benefit e.g. improved access to building for wheelchair users/larger font on leaflets/letters for sight impaired. Enter any evidence of a negative/adverse effect/impact that the policy/procedure/guideline etc may have on any group of people listed in A above. Enter information you already have about any affected group e.g. the number of people from the affected group who access the service (any adjustment to the service may not be financially viable if the cost of e.g. printing/storing leaflets in 200 different languages when monitoring figures show services users are 96.3% white British, 3.7% are Black and Minority Ethnic of whom 1% cannot read English. An alternative reasonable adjustment may be to provide an interpreter).</p>			
2. What involvement has there been with the people that might be affected directly or indirectly by the policy/procedure/strategy/service/project/function?			
<p>Ask yourself: Who have we involved and how? Who else needs to be involved at this stage? What information do we have to support the development of the policy/strategy/project/development/function in relation to our duty to promote equality? Consider groups that you may have consulted within Blackpool Fylde & Wyre NHS Trust and any external organisations.</p> <p>This will involve consulting and engaging with organisations/people from the group that will have a negative/adverse effect due to the policy/procedure/service change etc. By consulting with such groups this will be used as evidence to show how you are going to overcome any negative effect or if the negative impact cannot be eliminated how the impact will be reduced.</p>			
3. What data and information have you gathered or have available to support the equality analysis?			
<p>Ask yourself: What data and evidence have you available? E.g. Statistics or demographic data; recent research findings; the results of consultations/ surveys; analysis of complaints; results of equality monitoring data. Has your data reflected equality and diversity issues? Do you have enough to proceed at this stage? (if you have insufficient data to help you to complete this section then probably the first actions in your action plan will be to gather further data)</p> <p>Use any evidence you have gathered (as indicated in the 'Ask yourself' section above) in answering this question.</p>			

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APPENDIX 6: EXAMPLE OF A COMPLETED FULL EQUALITY ANALYSIS FORM

4. Check for DIRECT and INDIRECT discrimination against any of the following groups of staff or service users:

Question: Is there any evidence that the following groups and individuals from these groups have different needs in relation to this policy or function?		Positive Impact	Negative Impact	Action Required		Priority High Medium Low	Reason/Comment
				Yes	No		
A	Age?	X					
B	Gender (male/female)?	X					
C	Learning Difficulties/Disability or Cognitive Impairment?		X	X		H	Make leaflets easy read and clear to understand
D	Mental Health Need?		X	X		H	Make leaflets easy read and clear to understand
E	Sensory Impairment /Physical Disability??		X	X			Have alternative accessible e.g. Braille, audio
F	Gender Identity (Gender Reassignment)?	X					
G	Race, Ethnicity, Religion, Language or Culture?		X	X		H	Make leaflets easy read and clear to understand and available in other languages
H	Religious, Spiritual belief (including other belief)?	X					
I	Sexuality/Sexual Orientation (Lesbian, Gay & Bi-sexual)?	X					
J	Any Long Term Medical Conditions?	X					
K	Carers?	X					

If 'YES' is answered to any of the above items, the policy or function may be considered discriminatory and require review and further work to ensure compliance with legislation.

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APPENDIX 6: EXAMPLE OF A COMPLETED FULL EQUALITY ANALYSIS FORM

5. Check for DIRECT and INDIRECT discrimination against any of the following groups of staff or service users:

Question:	Does your policy or function contain any conditions or requirements which are applied equally to everyone, but disadvantage particular person's because they cannot comply due to:	Positive Impact	Negative Impact	Action Required		Priority High Medium Low	Reason/Comment
				Yes	No		
A	Age?	X					
B	Gender (male/female/transgender)?	X					
C	Learning Difficulties/Disability or Cognitive Impairment?		X	X			Have leaflets in easy read format as well as in other languages. Consider coloured filters/overlays for people with dyslexia
D	Mental Health Need?		X	X			Have leaflets in easy read format and other languages
E	Sensory Impairment/ Physical Disability?		X	X			Have alternative accessible e.g. Braille, audio
F	Gender Identity (Gender Reassignment)?	X					
G	Race, Ethnicity, Religion, Language or Culture?		X				Make leaflets easy and clear to understand and available in other languages
H	Religious, Spiritual belief (including other belief)?	X					
I	Sexuality/Sexual Orientation (Lesbian, Gay & Bi-sexual)?	X					
J	Any Long Term Medical Conditions?	X					
K	Carers?	X					

If 'YES' is answered to any of the above items, the policy or function may be considered discriminatory and require review and further work to ensure compliance with legislation.

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APPENDIX 6: EXAMPLE OF A COMPLETED FULL EQUALITY ANALYSIS FORM

6. Check for DIRECT and INDIRECT discrimination against any of the following groups of staff or service users:

Question: Does your policy or function contain any statements which may exclude employees from operating the policy or function on the grounds of:	Positive Impact	Negative Impact	Action Required		Priority High Medium Low	Reason/ comment
			Yes	No		
A Age?				X		
B Gender (male/female/transgender)?				X		
C Learning Difficulties/Disability or Cognitive Impairment?						
D Mental Health Need?				X		
E Sensory Impairment/ Physical Disability?						
F Gender Identity (Gender Reassignment)?				X		
G Race, Ethnicity, Religion, Language or Culture?						
H Religious, Spiritual belief (including other belief)?						
I Sexuality/Sexual Orientation (Lesbian, Gay & Bi-sexual)?				X		
J Any Long Term Medical Conditions?				X		
K Carers?				X		

If 'YES' is answered to any of the above items, the policy or function may be considered discriminatory and require review and further work to ensure compliance with legislation.

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APPENDIX 6: EXAMPLE OF A COMPLETED FULL EQUALITY ANALYSIS FORM

7. What further information do you need to collect to provide a full picture to carry out the equality analysis?

Ask yourself: What sort of data needs to be collected? Who are you going to consult with? E.g. Internal and external organisations

Consult with representatives of groups that show a negative impact above to discuss how negative aspects can be eliminated or mitigated. Other groups to include in consultation might be NHS Trust e.g. Mental Health Trusts/ CCG's/Council as they might have some on-going work to reduce impact or hold information relevant to creating an action plan or involving additional groups. Type of data required might be around numbers/percentage of local residence/service user group(s) facing potential negative impact.

8. What is the summary of your equality analysis?

Ask yourself: *Who else needs to know? What outcomes are you looking for? How will you test it out?*

Share the summary and outcomes with the groups from the consultation, the Trust's Equality Diversity and Inclusion Implementation Group, Trust Board, Council of Governors, Staff and Unions. Explain the outcome required is to eliminate or mitigate the negative impact and to be more inclusive.

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APPENDIX 6: EXAMPLE OF A COMPLETED FULL EQUALITY ANALYSIS FORM

9. INDICATE WHICH GROUP(S) (IDENTIFIED AS A – J) YOUR ACTION POINT IS REFERING TO.

Consider carry out: involvement & consultation; data collection & evidence; assessment & analysis; procurement & partnerships; monitoring, evaluating & reviewing (including publishing the results). Use this form to create an action plan then summarise in Part B.

Ask yourself: What are you going to do differently as a result of this Equality Analysis? How and when are you going to consult on this action plan? Who else needs to know about this action plan? What other formats do you need to have it produced in e.g. language, Braille?

Group	Action	Outcome Measure	Who	When	Monitoring Arrangements

Review date for action plan:

NAME:		SIGNATURE:		DATE:	
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APPENDIX 6: EXAMPLE OF A COMPLETED FULL EQUALITY ANALYSIS FORM

EQUALITY ANALYSIS SUMMARY

Please list on this sheet any recommendations for action that you plan to take as a result of this Equality Analysis

ISSUE	ACTION REQUIRED	LEAD OFFICER	TIMESCALE	COSTS	COMMENTS

Sign off for Completed Plan

Authorised Manager: **Date:**

Date Copy Sent to ED & HR Steering Group: **By Whom:**

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APPENDIX 7: INITIAL EQUALITY ANALYSIS FORM					
Department	HR & OD	Service or Policy	Equality Analysis Procedure	Date Completed:	28 May 2015
GROUPS TO BE CONSIDERED					
Deprived communities, homeless, substance misusers, people who have a disability, learning disability, older people, children and families, young people, Lesbian Gay Bi-sexual or Transgender, minority ethnic communities, Gypsy/Roma/Travellers, women/men, parents, carers, staff, wider community, offenders.					
EQUALITY PROTECTED CHARACTERISTICS TO BE CONSIDERED					
Age, gender, disability, race, sexual orientation, gender identity (or reassignment), religion and belief, carers, Human Rights and social economic/deprivation.					
QUESTION	RESPONSE		IMPACT		
	Issue	Action	Positive	Negative	
What is the service, leaflet or policy development? What are its aims, who are the target audience?	EA development is to ensure completion of an EA on all documents/service provision, builds etc. The aims are to help eliminate/limit discrimination across services provision and employment. Target audience is all service users and staff across all protected characteristics.	Carry out EA on all services, patient leaflets, policies etc to raise awareness of diverse needs of service users and staff.	Yes – Equal access for all service users across all services and Equal employment		
Does the service, leaflet or policy/development impact on community safety • Crime • Community cohesion	Not applicable to crime. Possible outcome from EA – promoting equality of access to the services across all diverse sections of the community.	N/A	Yes		
Is there any evidence that groups who should benefit do not? i.e. equal opportunity monitoring of service users and/or staff. If none/insufficient local or national data available consider what information you need.	No this procedure should ensure a positive impact across all groups and identify any negative impact to be addressed. If insufficient data staff surveys and complaints monitoring to be used.	The procedure is to raise awareness of diverse groups and consideration of their needs.	Yes		
Does the service, leaflet or development/ policy have a negative impact on any geographical or sub group of the population?	None – unless protected characteristics or legislation changes then this procedure will be updated to comply.		Yes		
How does the service, leaflet or policy/development promote equality and diversity?	Ensures all developments in services, policy etc are done in line with equality legislation and best practice for inclusive approach for access to services.	Complete an EA for all services, leaflets, service changes, policies, developments etc to identify any positive or negative impacts.	Yes		
Does the service, leaflet or policy/development explicitly include a commitment to equality and diversity and meeting needs? How does it demonstrate its impact?	Explicitly includes a commitment to equality and diversity and meeting needs via completion of an EA which highlights any potential for a negative/adverse impact.		Yes		
Does the Organisation or service workforce reflect the local population? Do we employ people from disadvantaged groups	Our workforce is reflective of the local population. Worked in conjunction with Jobcentre Plus to assist long term unemployed people with health conditions back to work.		Yes – see comparison table between workforce and community available on the intranet, in the SES or in the Annual Report. Jobcentre Plus Report / agreement.		
Will the service, leaflet or policy/development iv. Improve economic social conditions in deprived areas v. Use brown field sites vi. Improve public spaces including creation of green spaces?	N/A				
Does the service, leaflet or policy/development promote equity of lifelong learning?	N/A				
Does the service, leaflet or policy/development encourage healthy lifestyles and reduce risks to health?	There is the potential to reduce risks to health by ensuring equal access to all services meet the needs of a diverse community.		Yes		
Does the service, leaflet or policy/development impact on transport? What are the implications of this?	N/A				
Does the service, leaflet or policy/development impact on housing,	N/A				

APPENDIX 7: INITIAL EQUALITY ANALYSIS FORM				
housing needs, homelessness, or a person's ability to remain at home?				
Are there any groups for whom this policy/ service/leaflet would have an impact? Is it an adverse/negative impact? Does it or could it (or is the perception that it could exclude disadvantaged or marginalised groups?	None identified		Yes	
Does the policy/development promote access to services and facilities for any group in particular?	No – EA should ensure the needs of all groups are considered and highlight possible negative impact		Yes	
Does the service, leaflet or policy/development impact on the environment • During development • At implementation?	No		Yes	
ACTION:				
Please identify if you are now required to carry out a Full Equality Analysis		Yes	No	(Please delete as appropriate)
Name of Author:	Tina Daniels	Date Signed:		May 2015
Signature of Author:				
Name of Lead Person:	Tina Daniels	Date Signed:		May 2015
Signature of Lead Person:				
Name of Manager:		Date Signed:		
Signature of Manager				

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