Stage 1   Initial Screening Assessment

Directorate:	
Service:	
Name of scheme:	
Officer responsible for assessment:	
Lead manager responsible for assessment:	
Are you proposing to:	☐ **Introduce a service** ☐ **Increase a service** ☐ **Remove a service** ☐ **Charge for a service** ☐ **Change a service** ☐ **Reduce a service**
Date completed:	
Date of sign off:	

This template should also be used in conjunction with material in the EqIA toolkit.

1 Purpose of the analysis

The purpose of this relevance assessment is to analyse the information gathered, to test it for potential relevance to equality, diversity, and inclusion. A relevance ranking of high, moderate, or low will be applied.

- A strategic EqIA is positioned within the organisations EDI priorities and any EDI strategy or strategic framework.

- A strategic EqIA is treated as a strategic process and forms an integral part of strategy development and decision making on EDI.

- Consideration is given to all protected characteristic groups.

- Consideration and 'due regard' is given to the three needs of the ~general duty which are broadly: advancing equality of opportunity; eliminating discrimination & harassment; fostering good relations.

- Decisions are primarily focused on high level intentions and direction to be mapped against and mainstreamed into related areas of organisational strategy, policy, and practice.

- The review team involved in the EqIA process have read this guidance, use the EqIA toolkit in conjunction with the template and have sufficient existing knowledge of the legal background, principles, and intent of EqIA.

Other key considerations:

- Prepare in advance of the strategy development cycle, review timescales and allow sufficient time

- Select and gather a representative team of key internal and external partners

- Gather all relevant data and evidence

- Identify and map the relevant organisational strategies, impact assessments (including the environment) and policies that link to all areas of the strategy and related equality, diversity, and inclusion activity, including the organisation's EDI strategy, EDI outcomes and PSED reporting

- Ensure that decisions, rationale, and accountability for action are clear and recorded

- Ensure there is a clear process in place to support ongoing monitoring, evaluation, and review.

2   About the scheme

Briefly describe your proposal, including aims, strategic EDI priorities, delivery outcomes, main beneficiaries/stakeholders, and its desired outcomes:

3 Evidence and intelligence

What advice, evidence and/or intelligence have you considered to assess the scheme and its relevance to equality? Please include data, research, engagement, and can be national, regional, local or project specific.

4   Assessing impacts and relevance

A. Based on the evidence you have detailed above, assess who will be relevant to, and to what degree: (please tick)	
Protected characteristic:	**Details of impact** – consider if the relevance of the scheme to that group is high, moderate or none.
☐ **Age**	
☐ **Disability**	
☐ **Gender reassignment**	
☐ **Race**	

Religion / belief (or lack of)	
Sex	
Sexual orientation	
Marriage / civil partnership	
Pregnancy / maternity	

B. Does the scheme allow us to meet any of our Equality Duty aims?
(please tick)

☐	**Eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited by the Act** (i.e., the scheme removes or minimises disadvantages suffered by people due to their protected characteristics).
☐	**Advance equality of opportunity between those who share a protected characteristic and those who do not** (i.e., the scheme takes steps to meet the needs of people from protected groups where these are different from the needs of other people).
☐	**Foster good relations between people who share a protected characteristic and those who do not** (i.e., the scheme encourages people from protected groups to participate in public life or in other activities where their participation is disproportionately low).

C. If no relevance to equality is identified using the information at point 3 above, detail your rationale and how the information supports this conclusion:

5 Conclusions and next steps

Assess the relevancy **Ranking description**	
	High – The scheme is highly relevant to one or more protected characteristic (see 4A) and/or one or more aim of the general equality duty (see 4C). In consideration of the evidence above, the scheme is highly relevant to our equality objectives **Continue to complete Stage 2.**
	Moderate – The scheme is moderately relevant to one or more protected characteristic (see 4A) and/or one or more aim of the general equality duty (see 4C). In consideration of the evidence above, the scheme is moderately relevant to our equality objectives **Continue to complete Stage 2.**
	None – The scheme is not relevant to any protected characteristic (see 3) and/or any aim of the general equality duty. In consideration of the evidence above, the scheme has little relevance to our equality objectives **Completion of Stage 2 is not required.**

6 Head of Service sign off

Name:	
Service:	
Date:	
Signature:	