



## Equality Impact Assessment Template

Before carrying out EqIA, you should familiarise yourself with the University's EqIA Policy Statement and Guidance and Checklist Notes, and undertake our online training on Equality and Diversity and EqIA. These, along with further information and resources, are available at [www.ed.ac.uk/schools-departments/equality-diversity/impact-assessment](http://www.ed.ac.uk/schools-departments/equality-diversity/impact-assessment)

EqIA covers policies, provisions, criteria, functions, practices and activities, including decisions and the delivery of services, but will be referred to as 'policy/practice' hereinafter.

<p><b>A. Policy/Practice (name or brief description):</b> Review of University expenses policy (December 2018)</p>
<p><b>B. Reason for Equality Impact Assessment (Mark <b>yes</b> against the applicable reason):</b> Undertaking a review of an existing policy (Expenses Policy - December 2017)</p>
<p><b>C. Person responsible for the policy area or practice:</b> Name: Julia Miflin Job title: Senior Controls Accountant School/service/unit: CSG Finance</p>
<p><b>D. An Impact Assessment has been carried out as the following sections apply to the policy/practice:</b></p> <ul style="list-style-type: none"><li>• affects primary or high level functions of the University</li><li>• is relevant to the promotion of equality (in terms of the Public Sector Equality Duty 'needs' as set out in the Policy and Guidance)</li><li>• It is one which interested parties could reasonably expect the University to have carried out an EqIA</li></ul>
<p><b>E. Equality Groups</b></p> <p>To which equality groups is the policy/practice relevant and why?</p> <ul style="list-style-type: none"><li>• Age – n/a</li><li>• Disability – yes (Section 5 Travel for University purposes<sup>1</sup>)</li><li>• race (including ethnicity and nationality) – potentially (policy language is English)</li><li>• religion or belief – n/a</li><li>• sex – n/a</li><li>• sexual orientation – n/a</li><li>• gender reassignment – n/a</li><li>• pregnancy and maternity – yes (Section 5 Travel for University purposes<sup>1</sup>)</li><li>• marriage or civil partnership<sup>2</sup> - n/a</li></ul>

<sup>1</sup> Non-standard class rail fares, internal flights in the UK and business class flights overseas are permitted for disability, impairment or other health-related reasons.

<sup>2</sup> Note: only the duty to eliminate discrimination applies to marriage and civil partnership. There is no need to have regard to advancing equality or opportunity or fostering good relations in this respect.

## Introduction

The University expenses policy applies to all staff, to students and others who are employed by the University so has a potential impact on all Equality Groups.

The HR Policy Development Group was consulted in the development of this policy and continues to be consulted in the annual review of this policy.

Applicable statements - notes:

- On any available information about the needs of relevant equality groups:

Of the circa 650 queries to the Expenses Policy helpline since 1<sup>st</sup> December 2017, one query related to the equality group, Disability. No queries have been received regarding the other Equality Groups. The member of staff enquired about upgrading to business class for a flight which is permitted in the policy by allowing non-standard class rail travel for “disability, impairment or other health-related reasons”.

- Any gaps in evidence/insufficient information to properly assess the policy, and how this be will be addressed:

None identified.

- If application of this policy/practice leads to discrimination (direct or indirect), harassment, victimisation, less favourable treatment for particular equality groups:

The policy is not considered to lead to discrimination (direct or indirect), harassment, victimisation, or less favourable treatment for particular equality groups nor create any barriers for any groups.

- If the policy/practice contributes to advancing equality of opportunity<sup>3</sup>:

The policy contributes to advancing equality of opportunity (and fostering good relations) for the disability equality group by allowing non-standard class rail travel for “disability, impairment or other health-related reasons”. The potential impact on race is the published language of the policy. As the main teaching language of the University is English, this should not cause any disadvantage. The policy can be requested in an alternative format per the Support section of the policy.

There is an Expenses Policy helpline for advice on any expense-related issues. From 21<sup>st</sup> January 2019, this will be the Finance helpline (delivered by the Service Excellence First Line Support project).

- If there is an opportunity in applying this policy/practice to foster good relations:

As mentioned above, the policy fosters good relations for the disability and pregnancy and maternity equality groups by permitting non-standard class rail travel for “disability, impairment or other health-related reasons” and the provision of an Expenses policy helpline.

- If the policy/practice create any barriers for any other groups?

None identified.

---

<sup>3</sup> This question does not apply to the protected characteristic of marriage or civil partnership

- How the communication of the policy/practice is made accessible to all groups, if relevant?

Section 12 of the policy, Support, asks that staff contact the Finance helpline if they require the policy in an alternative format. No requests have been received to date.

- How equality groups or communities are involved in the development, review and/or monitoring of the policy or practice?

The staff consultation took place between 11<sup>th</sup> October and 7<sup>th</sup> December 2018. No issues relating to Equality Groups were raised in this consultation. The policy and review of the policy has been discussed with HR Policy Development Group.

- Any potential or actual impact of applying the policy or practice, with regard to the need to eliminate discrimination, advance equality and promote good relations:

None identified in addition to the points already mentioned above.

#### F. Equality Impact Assessment Outcome

Select one of the four options below to indicate how the development/review of the policy/practice will be progressed and state the rationale for the decision:

**Option 1:** No change required – the assessment is that the policy/practice is robust:

The current Expenses Policy was approved by Central Management Group on 26<sup>th</sup> September 2017 and the CJCNC (Combined Joint Consultative Negotiative Committee) on 13<sup>th</sup> October 2017. The effective date of implementation was 1<sup>st</sup> December 2017. This annual review of the policy on 1<sup>st</sup> December 2018 has identified minor clarifications to the policy which do not impact on Equality Groups.

#### G. Action and Monitoring

1. Specify the actions required for implementing findings of this EqIA and how the policy or practice will be monitored in relation to its equality impact (or note where this is specified above):

Continue to review the policy and EqIA on an annual basis (1<sup>st</sup> December) and to monitor and report accordingly on any further equality related feedback received, and address appropriately, if required.

2. When will the policy/practice next be reviewed?  
1<sup>st</sup> December 2019.

#### H. Publication of EqIA

Can this EqIA be published in full, now?

Yes, after policy changes are approved by the University Executive on 15<sup>th</sup> January 2019 and CJCNC on (date tbc).

I. Sign-off

EqIA undertaken by (name(s) and job title(s)):

Completed by : Julia Miflin  
Senior Controls Accountant  
13<sup>th</sup> December 2018

Accepted by: Lee Hamill  
Deputy Director of Finance  
Dec. 18

Retain a copy of this form for your own records and send a copy to  
[equalitydiversity@ed.ac.uk](mailto:equalitydiversity@ed.ac.uk)