



## 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.

**A. Policy/Practice (name or brief description):**

Interim P-Card Policy for IGMM

As part of the Finance Transformation Programme's pilot Procurement Hub in IGMM, purchasing cards (P-cards) will be introduced for some staff in procurement roles. P-cards are similar to corporate credit cards and are used to make low-value one-off purchases when it is not possible to use the purchase order route, or where this would be impractical. This is a new practice for the University, so an interim policy has been drafted to govern use of the cards.

If successful, P-cards and the associated policy will be rolled out to procurement staff in other parts of the University.

**B. Reason for Equality Impact Assessment (Mark **yes** against the applicable reason):**

- Proposed new policy/practice **YES**
- Proposed change to an existing policy/practice **YES**
- Undertaking a review of an existing policy/practice
- Other (please state):

**C. Person responsible for the policy area or practice:**

**Name:** George Sked  
**Job title:** Joint Director of Procurement  
**School/service/unit:** Finance

**D.** An Impact Assessment should be carried out if any of the following apply to the policy/practice, if it:

- affects primary or high-level functions of the University
- is relevant to the promotion of equality (in terms of the Public Sector Equality Duty 'needs' as set out in the Policy and Guidance)?
- It is one which interested parties could reasonably expect the University to have carried out an EqlA? **YES**

**E.** Equality Groups

To which equality groups is the policy/practice relevant and why? (add notes against the following applicable equality group/s)

- Age
- Disability
- race (including ethnicity and nationality)
- religion or belief
- sex
- sexual orientation
- gender reassignment
- pregnancy and maternity
- marriage or civil partnership<sup>1</sup>

**Age**

No concerns raised.

**Disability**

All internal policy, training and guidance related to P-card use will be provided in accessible formats upon request and this is noted in the policy document.

The P-card application process is carried out using editable pdf form, which is compatible with screen readers and does not require a physical signature from the applicant.

**Race**

The P-card application form, which is issued by the University's bank, asks applicants to state their nationality for identity verification purposes. The aim of this process is to check that the applicant is not a false identity created to facilitate fraud, applicants' nationality does not affect eligibility. The bank process for verification purposes is the same for all race, ethnicity and nationality groups – no difference in process exists.

**Religion or belief**

No concerns raised

**Sex**

No concerns raised

**Sexual orientation**

No concerns raised

**Gender reassignment**

No concerns raised

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<sup>1</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.

## **Pregnancy and maternity**

No concerns raised

## **Marriage or civil partnership**

No concerns raised.

Add notes against the following applicable statements:

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

P-cards are part of the Finance Target Operating Model, which was developed following consultation with 147 stakeholders, including members of equality groups, from across the University through process and people workshops and one to one meetings.

Stakeholders were invited to review workshop outputs and provide feedback to FTP through the wiki, by e-mail or in person. No feedback was provided or concerns raised about specific needs of any equality groups.

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

At this stage we feel we have sufficient evidence to proceed, however, the information will be reviewed before a decision is taken on whether to roll out P-cards for wider use at the end of the Pilot period (end of March 2020)

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

We do not envisage that this policy will lead to any form of prohibited conduct.

- **If the policy/practice contributes to advancing equality of opportunity<sup>2</sup>**

The policy is not expected to contribute to advancing equality of opportunity.

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

It is hoped that the consideration of equality and diversity as part of this project will raise awareness and profile of such issues and demonstrate the University's commitment to equality and diversity.

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

We do not envisage that this policy will create barriers for any other groups.

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

There will be a communication plan developed as part of the FTP implementation plan. This will include communication around changes to the policy and where to access help. The information will be provided digitally and through managers (via SEP communication cascade tools) and in alternative/accessible formats where required.

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

Stakeholders will continue to be consulted during the implementation phase and any equality and diversity issues raised will be addressed appropriately. The University has a commitment to working in partnership with the joint unions and they will be consulted throughout the implementation of FTP projects.

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<sup>2</sup> This question does not apply to the protected characteristic of marriage or civil partnership

- **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:**

We do not envisage any impact other than the issues discussed 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 applies.**

**Option 1:** No change required – the assessment is that the policy/practice is/will be robust. **As explained at Section E above, no particular equality groups are affected.**

**Option 2:** Adjust the policy or practice – this involves taking steps to remove any barriers, to better advance equality and/or to foster good relations. **Not applicable**

**Option 3:** Continue the policy or practice despite the potential for adverse impact, and which can be mitigated/or justified. **Not applicable**

**Option 4:** Stop the policy or practice as there are adverse effects cannot be prevented/mitigated/or justified. **Not applicable**

#### 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).

The EqIA will be presented as part of the approval process for the Interim P-Card Policy, after which it will be monitored as part of the pilot implementation.

2. When will the policy/practice next be reviewed?

The interim policy will be reviewed at the end of the Procurement Hub pilot (end of March 2020). If any feedback is received in relation to the impact on protected groups, this will be used to adapt the policy prior to wider implementation. Once any new policy is live monitoring will also continue.

#### H. Publication of EqIA

Can this EqIA be published in full, now? **Yes**

If No – please specify when it may be published or indicate restrictions that apply: **N/A**

#### I. Sign-off

**EqIA undertaken by (name(s) and job title(s)):** Kirsty Hughes, Senior Service Excellence Partner

**Accepted by (name):** George Sked, Director of Procurement

**Date:** 8 November 2019

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

