



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

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: Petty Cash Policy

This policy establishes the proper uses and administration of petty cash funds.

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

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

C. Person responsible for the policy area or practice:

Name: **Anne Marie Gregory**

Job title: **Senior Financial Accountant**

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 EqIA

E. Equality Groups

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

- Age – **n/a**
- Disability – **n/a**
- race (including ethnicity and nationality) – **n/a**
- religion or belief – **n/a**
- sex – **n/a**
- sexual orientation – **n/a**

- gender reassignment – **n/a**
- pregnancy and maternity – **n/a**
- marriage or civil partnership¹ – **n/a**

Add notes against the following applicable statements:

- On any available information about the needs of relevant equality groups:
- Any gaps in evidence/insufficient information to properly assess the policy, and how this be will be addressed:
- If application of this policy/practice leads to discrimination (direct or indirect), harassment, victimisation, less favourable treatment for particular equality groups:
- If the policy/practice contributes to advancing equality of opportunity²
- If there is an opportunity in applying this policy/practice to foster good relations:
- If the policy/practice create any barriers for any other groups?
- How the communication of the policy/practice is made accessible to all groups, if relevant?
- How equality groups or communities are involved in the development, review and/or monitoring of the policy or practice?
- 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

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/will be robust.

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 and 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? **February 2020**

¹ 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.

² This question does not apply to the protected characteristic of marriage or civil partnership

H. Publication of EqIA

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

I. Sign-off

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

Anne Marie Gregory
Senior Financial Accountant

Accepted by (name):

Lee Hamill
Director of Finance

Date: **February 2019**

Retain a copy of this form for your own records and send a copy to equalitydiversity@ed.ac.uk