Equality and Human Rights Screening Template

The PHA is required to address the 4 questions below in relation to all its policies. This template sets out a proforma to document consideration of each question.

What is the likely impact on equality of opportunity for those affected by this policy, for each of the Section 75 equality categories? (minor/major/none)

Are there opportunities to better promote equality of opportunity for people within the Section 75 equality categories?

To what extent is the policy likely to impact on good relations between people of a different religious belief, political opinion or racial group? (minor/major/none)

Are there opportunities to better promote good relations between people of a different religious belief, political opinion or racial group?

For advice & support on screening contact:

Equality Unit,
BSO,
James House,
2-4 Cromac Avenue,
Belfast BT7 2 JA,
equality.unit@hscni.net.

SCREENING TEMPLATE

See Guidance Notes for further information on the 'why' 'what' 'when', and 'who' in relation to screening, for background information on the relevant legislation and for help in answering the questions on this template.

(1) INFORMATION ABOUT THE POLICY OR DECISION

1.1 Title of policy or decision

Terms of Reference for the Safer Mobility Model NI Service User and Carer Reference Group.

1.2 Description of policy or decision

What is it trying to achieve? (aims and objectives)

The Service User and Carer Group exists to ensure that the voices, experiences, and perspectives of service users and carers are central to the planning, delivery, and evaluation of the Safer Mobility Model. It provides a forum for meaningful engagement, collaboration, and co-production between service users, carers, and staff. Its aims to do the following;

- To represent the views and experiences of service users and carers in supporting decision-making processes within the model.
- To advise on service improvements,
- To promote equality, diversity, and inclusion in all aspects of service design and delivery.
- To identify barriers to participation and suggest practical solutions.
- To support continuous improvement through feedback and shared learning.

How will this be achieved? (key elements)

Inclusive Membership:
Ensure representation from a diverse range of Service Users and Carers, reflecting different backgrounds, experiences, and needs.
Accessible Participation:
Provide meetings in accessible venues (or online), offer interpreters, alternative formats, and reasonable adjustments.
Clear Communication:
Use plain language in all documents and discussions; share agendas and minutes in advance.
Co-Production Approach:
Work collaboratively with Service Users and Carers in decision-making, valuing lived experience as equal to professional expertise.
Support and Training:
Offer induction and ongoing support for members to build confidence and understanding of

their role.

Feedback and Continuous Improvement:
Regularly review the group's effectiveness and act on feedback from members.

Equality and Respect:
Uphold Section 75 duties and promote equality, diversity, and inclusion in all activities.

What are the key constraints? (for example, financial, legislative or other)

Financial:
Limited budget for meeting expenses, accessibility supports (e.g., interpreters, transport), or member reimbursements.

Legislative:
Compliance with Section 75 of the Northern Ireland Act, Data Protection (GDPR), and safeguarding requirements.

Organisational:
Availability of staff to support the group, time constraints for meetings, and alignment with organisational priorities.

Resource Limitations:
Limited capacity for training, technology (e.g., online platforms), or administrative support.

Geographical:
Challenges in ensuring participation from people in rural or remote areas.

Representation:
Difficulty in achieving full diversity across all Section 75 categories due to recruitment challenges.

Accessibility:
Ensuring venues, materials, and communication methods meet diverse needs.

1.3 Main stakeholders affected (internal and external)

For example staff, actual or potential service users, other public sector organisations, voluntary and community groups, trade unions or professional organisations or private sector organisations or others

Internal Stakeholders:

Staff within the organisation – including frontline practitioners, managers, and administrative teams who will support the Service User and Carer Group and implement its recommendations.

Senior Management and Governance Teams – responsible for ensuring compliance with Section 75 of the Northern Ireland Act 1998, organisational equality schemes, and strategic objectives.

External Stakeholders:

Actual Service Users and Carers – individuals currently receiving health and social care

services whose lived experience will inform service improvement.

Potential Service Users and Carers – people who may access services in the future and benefit from inclusive planning.

Voluntary and Community Sector Organisations – groups advocating for Service Users and Carers, often representing Section 75 categories (e.g., disability, ethnic minority, LGBTQ+ organisations).

Other Public Sector Bodies – Health and Social Care Trusts, local councils, and statutory agencies that may collaborate or align policies.

Trade Unions and Professional Organisations – representing staff interests and ensuring fair working practices.

Private Sector Providers – organisations delivering contracted services who may need to adapt based on group input.

Advocacy and Equality Groups – organisations promoting rights and inclusion for underrepresented communities, ensuring compliance with equality and human rights duties.

1.4 Other policies or decisions with a bearing on this policy or decision

Section 75 Equality Scheme
Sets out duties to promote equality of opportunity and good relations.
Disability Action Plan
Ensures compliance with disability duties.
Personal and Public Involvement (PPI) Policy
Utilise how service users and carers should be involved in influencing decision-making.
Service User & Carer Reimbursement policy and guidance
Clear guidance in how Service User and Carers can reclaim out of pocket expenses through their active participation.
Data Protection and GDPR Policy
Governs handling of personal information.
Safeguarding Policy
Ensures protection of vulnerable adults and children.
Regional Health and Social Care Strategies
Owned by Department of Health NI; influence engagement priorities.
Human Rights Act Compliance
UK Government; ensures rights are respected in participation.
Complaints and Feedback Policy
Links to how service user input is managed.

Equality & Disability Duties Screening Templates (NI public authorities)

NI Departments/Agencies (e.g., DAERA, NIO).

HSC Equality/Human Rights Screening practice

Public Health Agency (PHA) / Business Services Organisation Equality Unit.

Safe & Effective Staffing / Delivering Care policies

Department of Health (NI).
May affect staff capacity to support the group and the pace of implementing recommendation

(2) CONSIDERATION OF EQUALITY AND GOOD RELATIONS ISSUES AND EVIDENCE USED

2.1 Data gathering

What information did you use to inform this equality screening? For example, previous consultations, statistics, research, Equality Impact Assessments (EQIAs), complaints. Provide details of how you involved stakeholders, views of colleagues, service users, staff side or other stakeholders.

Previous Consultations and Engagement
Feedback gathered through Personal and Public Involvement (PPI) activities, including Service User and Carer forums, surveys, and focus groups conducted during previous service improvement projects.

Equality Impact Assessments (EQIAs)
Findings from earlier EQIAs on related policies such as engagement strategies and complaints procedures were reviewed to identify recurring equality issues and mitigation measures.

Statistics and Research

- Section 75 monitoring data from our organisation and regional health bodies.
- Northern Ireland Census data and Equality Commission NI research on participation barriers for protected groups.
- Reports from advocacy organisations (e.g., Disability Action, Age NI, Migrant Centre NI) highlighting accessibility and inclusion challenges.

Complaints and Feedback
Review of complaints and compliments relating to Service User and Carer Involvement and accessibility, which informed adjustments to meeting formats and communication methods.

Stakeholder Involvement

- **Service Users and Carers**: Previous informal discussions and structured feedback sessions to understand practical barriers (e.g., transport, childcare, language support).
- **Staff**: Consulted on staff capacity and support for engagement activities.
- **Colleagues and Equality Leads**: Engagement with BSO Equality Unit and PHA Equality lead.
- **Voluntary and Community Sector Partners**: Input from organisations representing Section 75 categories to ensure inclusive practices.

2.2 Quantitative Data

Who is affected by the policy or decision? Please provide a statistical profile. Note if policy affects both staff and service users, please provide profile for both.

Category	***What is the makeup of the affected group? (%) Are there any issues or problems? For example, a lower uptake that needs to be addressed or greater involvement of a particular group?***
Gender	Service User & Carer Profile (Northern Ireland Population – Census 2021) Total population: 1,903,175 Female: 51% (approximately 971,000) Male: 49% (approximately 932,000)
Age	19.2% under 15; 31.2% aged 15–39; 32.4% aged 40–64; 17.2% aged 65+.
Religion	45.7% Catholic; 43.4% Protestant/Other Christian; 11% no religion.
Political Opinion	Mixed representation (Unionist, Nationalist, Other).
Marital Status	47% married or in a civil partnership 36% single 9% divorced or separated 8% widowed
Dependent Status	Around **12% of adults provide unpaid care** for dependants (children, older relatives, disabled persons). 32% of households have dependent children.
Disability	Approximately **24% of the population** report a limiting long-term condition or disability.
Ethnicity	96.6% White 3.4% Minority ethnic (including Asian, Black, Mixed, Other) Most common minority languages: Polish, Arabic, Chinese.
Sexual Orientation	Estimates suggest 2–3% identify as LGB (based on NI Life & Times Survey)

2.3 Qualitative Data

What are the different needs, experiences and priorities of each of the categories in relation to this policy or decision and what equality issues emerge from this? Note if policy affects both staff and service users, please discuss issues for both.

Category	*Needs and Experiences*
Gender	**Service Users and Carers:** Women often have caring responsibilities and may need flexible meeting times or childcare support. Men may be less likely to engage in support forums. **Staff**: Majority female workforce; flexible working arrangements are important. **Equality Issue**: Ensure gender balance and family-friendly scheduling.
Age	**Service Users**: Older people may face transport and digital barriers; younger carers may prefer online engagement. **Staff**: Age diversity means varying digital skills and availability. **Equality Issue**: Offer both in-person and virtual options; provide tech support.
Religion	**Service Users & Staff**: Meetings should avoid major religious holidays; respect dietary and cultural practices. **Equality Issue**: Neutral and inclusive environment for all faiths.
Political Opinion	**Service Users & Staff**: Ensure neutrality and avoid political bias in discussions. **Equality Issue**: Promote good relations and maintain impartiality.
Marital Status	**Service Users**: Single parents may need childcare support; widowed individuals may experience isolation. **Staff**: Lone parents may require flexibility. **Equality Issue**: Provide remote participation and consider childcare reimbursement.
Dependent Status	**Service Users**: Carers often have limited time; may need respite or support to attend. **Staff**: Caring responsibilities require flexible scheduling. **Equality Issue**: Build flexibility into meeting times and formats.
Disability	**Service Users**: Physical, sensory, and mental health needs require accessible venues, interpreters, and easy-read materials. **Staff**: Reasonable adjustments needed for staff with disabilities. **Equality Issue**: Ensure compliance with Disability Discrimination Act and provide adjustments.
Ethnicity	**Service Users**: Minority ethnic groups may face language barriers and cultural differences. **Staff**: Minority ethnic staff may experience underrepresentation. **Equality Issue**: Provide translation/interpreting services and culturally sensitive engagement.
Sexual Orientation	**Service Users & Staff**: LGBTQ+ individuals may fear discrimination; need inclusive language and safe spaces. **Equality Issue**: Explicit commitment to inclusion in Terms of Reference.

2.4 Multiple Identities

Are there any potential impacts of the policy or decision on people with multiple identities? For example; disabled minority ethnic people; disabled women; young Protestant men; and young lesbians, gay and bisexual people.

The policy aims to promote inclusion, but individuals with intersecting identities may face **compounded barriers**. Examples include: **Disabled minority ethnic people** May experience both physical accessibility challenges and language/cultural barriers. **Mitigation**: Provide accessible venues and formats, plus translation/interpreting services. **Disabled women** Could face additional caring responsibilities alongside accessibility needs. **Mitigation**: Offer flexible scheduling, childcare support/reimbursement, and reasonable adjustments such as meeting notes posted, reminders and meeting support after each meeting. **Young Protestant men** May feel underrepresented or disengaged if group composition does not reflect political/religious diversity. **Mitigation**: Ensure balanced recruitment and neutral facilitation. **Young lesbians, gay and bisexual people** May fear discrimination or lack of safe space for expression. **Mitigation**: Use inclusive language, confidentiality assurances, and visible commitment to equality.

2.5 Making Changes

Based on the equality issues you identified in 2.2 and 2.3, what changes did you make or do you intend to make in relation to the policy or decision in order to promote equality of opportunity?

In developing the policy or decision what did you do or change to address the equality issues you identified?	***What do you intend to do in future to address the equality issues you identified?***
Accessibility: • Meetings will be held in venues that are fully accessible for people with physical disabilities.	**Monitor Participation and Representation:** • Collect and review demographic data (Section 75 categories) of group members and participants.

- Alternative formats (easy-read, large print, Braille) and assistive technologies will be provided on request.
- Online participation options will be available for those unable to attend in person.
- A written summary will be provided after each meeting.
- Staff support on request after each meeting.
- All meetings dates and times provided in advance.
- Touch base sessions for Service Users and Carers who miss a meeting.
- Post hard copies of the slides and meeting papers on request.
- Calendar meeting invites and reminders.

Language and Communication:

- Plain language will be used in all documents and communications.
- Interpreting and translation services will be offered for minority ethnic participants and those with language needs.

Flexible Engagement

- Meetings will be scheduled at varied times and offer hybrid options to accommodate carers and those with dependants.
- Expenses for travel and childcare will be reimbursed where possible.

Representation and Inclusion

- Recruitment will actively seek diverse representation across Section 75 categories, including age, gender, disability, ethnicity, and sexual orientation.
- Identify gaps in representation and take targeted action to recruit underrepresented groups.

Enhance Accessibility:

- Regularly review venues, digital platforms, and materials for accessibility.
- Expand use of assistive technologies and alternative formats as needed.

Improve Language and Cultural Inclusion

- Maintain a register of interpreting and translation services.
- Engage with minority ethnic and cultural organisations to inform inclusive practices.

Support Carers and People with Dependants

- Continue offering flexible meeting times and hybrid options.
- Explore funding for childcare and travel reimbursement to remove participation barriers.

Strengthen Training and Awareness

- Provide ongoing equality and diversity training for staff supporting the group.
- Offer induction and confidence-building sessions for service users and carers.

Embed Intersectionality

- Review feedback and complaints for issues affecting people with multiple identities.
- Adapt engagement methods to address compounded barriers (e.g., disabled minority ethnic participants).

• Terms of Reference will include a clear commitment to equality, diversity, and respect. **Training and Support** • Induction and ongoing support will be provided for service users and carers to build confidence and understanding of their role. • Staff supporting the group will receive equality and inclusion training. **Monitoring and Review** • Participation will be monitored by Section 75 categories to identify gaps. • Feedback from members will be regularly reviewed to inform improvements.	**Continuous Feedback and Review** • Establish a feedback mechanism for members to raise equality concerns. • Review Terms of Reference annually to ensure it reflects best practice and emerging needs.

2.6 Good Relations

What changes to the policy or decision – if any – or what additional measures would you suggest to ensure that it promotes good relations? (refer to guidance notes for guidance on impact)

Group	***Impact***	***Suggestions***
Religion	• Meetings could unintentionally clash with major religious holidays, limiting participation. • Lack of awareness of cultural or religious practices may create discomfort or exclusion.	• Schedule meetings to avoid major religious observances. • Provide culturally sensitive catering and respect dietary requirements. • Include a statement in the Terms of Reference committing to respect for all faiths.

Political Opinion	• Discussions could be perceived as biased if language or examples reflect one political viewpoint. • Group composition may unintentionally lack balance, leading to mistrust.	• Use neutral, inclusive language in all documents and discussions. • Ensure recruitment reflects a broad range of perspectives. • Train facilitators to manage discussions impartially and promote constructive dialogue.
Ethnicity	• Minority ethnic participants may face language barriers or feel underrepresented. • Cultural differences could lead to misunderstandings or disengagement.	• Provide interpreting and translation services where needed. • Engage with minority ethnic community organisations to encourage participation. • Include cultural awareness training for staff supporting the group.

(3) SHOULD THE POLICY OR DECISION BE SUBJECT TO A FULL EQUALITY IMPACT ASSESSMENT?

A full equality impact assessment (EQIA) is usually confined to those policies or decisions considered to have major implications for equality of opportunity.

How would you categorise the impacts of this decision or policy? (refer to guidance notes for guidance on impact)

Please tick:

Major impact	
Minor impact	x
No further impact	

Do you consider that this policy or decision needs to be subjected to a full equality impact assessment?

Please tick:

Yes	
No	x

Please give reasons for your decisions.

The Terms of Reference is primarily an internal governance document that sets out how the Service User and Carer Group will operate. It does not introduce new services, change eligibility criteria, or alter access to existing services. The equality issues identified (e.g., accessibility, language support, flexible engagement) have been addressed through changes and mitigation measures outlined in Section 2.5. Therefore, the policy is not expected to create any additional adverse impact on any Section 75 category beyond what has already been mitigated.

(4) CONSIDERATION OF DISABILITY DUTIES

4.1 In what ways does the policy or decision encourage disabled people to participate in public life and what else could you do to do so?

How does the policy or decision currently encourage disabled people to participate in public life?	*What else could you do to encourage disabled people to participate in public life?*
Current Measures: The Terms of Reference explicitly commits to inclusion and accessibility for disabled people. Meetings will be held in fully accessible venues and/or online platforms that meet accessibility standards. Reasonable adjustments will be provided, including interpreters, assistive technology, and alternative formats (easy-read, large print, Braille). Recruitment for the Service User and Carer Group will actively encourage participation from people with disabilities. Expenses for travel and support will be reimbursed where possible to remove financial barriers. **Future Actions:** Engage with disability advocacy organisations (e.g., Disability Action, RNIB, Deaf Association NI) to inform us of participation methods. Develop **accessible digital engagement options**, including captioning and screen-reader friendly materials. Monitor participation by disability status and address gaps through targeted outreach.	**Proactive Outreach** Partner with disability advocacy organisations (e.g., Disability Action, RNIB, Deaf Association NI) to promote opportunities and co-design engagement methods. Use targeted recruitment campaigns that highlight accessibility and support available. **Accessible Digital Engagement** Provide captioning, British Sign Language (BSL) interpretation, and screen-reader friendly documents for virtual meetings. **Financial and Practical Support** Offer reimbursement for travel, childcare, and personal assistance costs. **Capacity Building** Provide training and confidence-building sessions for disabled participants to support meaningful involvement. Offer mentoring or buddy systems for new members. **Continuous Feedback** Establish a feedback mechanism specifically for disabled participants to identify barriers and suggest improvements. Review participation data regularly and adapt

	strategies to address gaps. **Representation in Decision-Making** Ensure disabled people are not only consulted but have a **formal role in governance structures** (e.g., voting rights within the group).

4.2 In what ways does the policy or decision promote positive attitudes towards disabled people and what else could you do to do so?

How does the policy or decision currently promote positive attitudes towards disabled people?	***What else could you do to promote positive attitudes towards disabled people?***
• The Terms of Reference explicitly commits to equality, inclusion, and respect for disabled people. • It ensures **reasonable adjustments** are available, such as accessible venues, interpreters, assistive technology, and alternative formats (easy-read, large print, Braille). • Recruitment for the Service User and Carer Group actively encourages participation from people with disabilities, valuing lived experience as equal to professional expertise. • Staff supporting the group will receive or have completed disability awareness training, promoting understanding and positive attitudes. • The group provides a platform for disabled people to influence decisions, reinforcing their role as partners rather than passive recipients of services.	• Co-design engagement methods with disability advocacy organisations to ensure best practice and visibility of disabled voices. • Include success stories and case studies in communications to highlight the contributions of disabled members. • Develop peer support or mentoring within the group to build confidence and leadership among disabled participants. • Provide ongoing training for staff and members on disability rights and inclusive language. • Publicly report on participation and outcomes to demonstrate commitment and accountability.

(5) CONSIDERATION OF HUMAN RIGHTS

5.1 Does the policy or decision affect anyone's Human Rights? Complete for each of the articles

ARTICLE	Yes/No
Article 2 – Right to life	No
Article 3 – Right to freedom from torture, inhuman or degrading treatment or punishment	No
Article 4 – Right to freedom from slavery, servitude & forced or compulsory labour	No
Article 5 – Right to liberty & security of person	No
Article 6 – Right to a fair & public trial within a reasonable time	No
Article 7 – Right to freedom from retrospective criminal law & no punishment without law	No
Article 8 – Right to respect for private & family life, home and correspondence.	No
Article 9 – Right to freedom of thought, conscience & religion	No
Article 10 – Right to freedom of expression	No
Article 11 – Right to freedom of assembly & association	No
Article 12 – Right to marry & found a family	No
Article 14 – Prohibition of discrimination in the enjoyment of the convention rights	No
1st protocol Article 1 – Right to a peaceful enjoyment of possessions & protection of property	No
1st protocol Article 2 – Right of access to education	No

*If you have answered no to all of the above please move on to **Question 6** on monitoring*

5.2 If you have answered yes to any of the Articles in 5.1, does the policy or decision interfere with any of these rights? If so, what is the interference and who does it impact upon?

List the Article Number	Interfered with? Yes/No	What is the interference and who does it impact upon?	Does this raise legal issues?* Yes/No

** It is important to speak to your line manager on this and if necessary seek legal opinion to clarify this*

5.3 Outline any actions which could be taken to promote or raise awareness of human rights or to ensure compliance with the legislation in relation to the policy or decision.

(6) MONITORING

6.1 What data will you collect in the future in order to monitor the effect of the policy or decision on any of the categories (for equality of opportunity and good relations, disability duties and human rights)?

Equality & Good Relations	Disability Duties	Human Rights
Demographic Data: • Collect Section 75 category information (gender, age, religion, political opinion, marital status, dependent status, disability, ethnicity, sexual orientation) for all group members and participants. **Participation Rates**: • Monitor attendance and engagement levels across different equality categories. **Feedback on Inclusion**: • Gather qualitative feedback from service users and staff on whether they feel respected and included. **Complaints and Issues**: • Track any complaints or concerns related to equality or good relations.	**Accessibility Requests**: • Record the number and type of reasonable adjustments requested and provided (e.g., interpreters, alternative formats, assistive technology). **Participation of Disabled People**: • Monitor representation of disabled people in the group and their level of involvement. **Feedback on Barriers**: • Collect feedback from disabled participants on any barriers encountered and suggestions for improvement.	**Rights-Based Feedback**: • Monitor whether participants feel their rights to participation, non-discrimination, and respect are upheld. **Complaints Related to Rights**: • Record and review any complaints or issues linked to human rights concerns. **Decision-Making Transparency**: • Track whether decisions are communicated clearly and fairly to all participants.

Approved Lead Officer: _____

Position: _____

Date: _____

Policy/Decision Screened by:

Business Unit and contact details _____

Please note that having completed the screening you are required by statute to publish the completed screening template, as per your organisation's equality scheme. If a consultee, including the Equality Commission, raises a concern about a screening decision based on supporting evidence, you will need to review the screening decision.

Please forward completed template to:
Equality.Unit@hscni.net

Template updated January 2015

Any request for this document in another format or language will be considered. Please contact us (see contact details provided above).