

Template &  
Guide

# Equality Impact and Needs Assessment



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# Introduction

This Equality Impact Assessment Guide is designed to support you in ensuring that equality and diversity are at the forefront of your projects. An Equality Impact Assessment should be performed at the beginning of any project (e.g., policy, process, or action), and should be reviewed throughout the project's lifetime, like a risk assessment.

Projects are susceptible to change, so it is important to review these changes to ensure they don't inadvertently discriminate.

Project leads hold a significant role in shaping the direction and outcomes of initiatives. Your decisions impact not only the success of the project but also the experiences of individuals involved, directly or indirectly, in its development and implementation. This guide aims to equip you with the tools and understanding needed to navigate the complexities of equality and diversity within your projects.



## Why it is Important...

Conducting an Equality Impact Assessment (EIA) is a proactive step in ensuring that equality and diversity are integral to your project from inception to completion. EIAs help with identifying and mitigating potential inequalities, enhancing organisational inclusivity and compliance, and reducing the risk of legal challenges.

Completing an Equality Impact Assessment is the responsibility of the project lead and should be completed in consultation with multiple people to ensure a diversity of perspectives and experiences. The more people involved in an Equality Impact Assessment, the broader the insight will be.

Research shows that diverse teams and inclusive cultures lead to better outcomes, increased innovation, and enhanced problem-solving capabilities. By prioritising equity and inclusion, you're not just fulfilling a legal requirement; you're also maximising the potential for success. Use the below template to guide your assessment. All Equality Impact Assessments should be filed for monitoring and quality considerations.



## Purpose

Equality Impact Assessments help public organisations to “demonstrate compliance” (Gov.uk) with the Equality Act 2010 and demonstrate good practice. Under the Equality Act 2010 it's a legal requirement for public authorities to:

1. “Eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under the Equality Act 2010;
2. advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it;
3. foster good relations between persons who share a relevant protected characteristic and persons who do not share it.” (Gov.uk, 2012)



**Direct Discrimination** is defined as “when you are treated worse than another person or other people because:

- you have a protected characteristic
- someone thinks you have that protected characteristic (known as discrimination by perception)
- you are connected to someone with that protected characteristic (known as discrimination by association)”

(Equality Human Rights Commission 2019).

**Indirect Discrimination** is defined as “when there is a policy that applies in the same way for everybody but disadvantages a group of people who share a protected characteristic, and you are disadvantaged as part of this group.” (Equality Human Rights Commission 2019).

**Harassment** is defined as “Unwanted conduct related to a protected characteristic, which has the purpose or effect of violating an individual’s dignity or creating an intimidating, hostile, degrading, humiliating or offensive environment for that individual” (Equality Act 2010).

An Equality Impact Assessment aims to support organisations in foreseeing and mitigating any possible discrimination or disadvantage perpetuated in or by policies, processes, or practices. Equality Impact Assessments support project leads to assess the potential impacts (positive, negative, or neutral) of their decisions on different equality groups. These equality groups include the 9 protected characteristics.

## Purpose

The **9 protected characteristics** as defined by the Equality Act 2010 include:

**Age**

**Race**

**Disability**

**Religion and Belief**

**Gender Reassignment**

**Sexual Orientation**

**Marriage and Civil Partnership**

**Sex**

**Pregnancy and Maternity**

To promote true inclusion, it's essential to be considerate beyond the protected characteristics. Other characteristics to consider include:

**Class and Socioeconomic Status**

**Parents**

**Caste**

**Carers**

**Educational Background**

**Children**

**Citizenship Status**

**Housing Status**



## Purpose

Completing Equality Impact Assessments with intersectionality in mind is crucial.

### Intersectionality:

- Recognises that individuals experience multiple forms of discrimination or disadvantage simultaneously
- Acknowledges that a combination of factors such as race, sexual orientation, disability, and more shapes our identities and experiences.

By considering intersectionality in Equality Impact Assessments, you can better understand how different aspects of a person's identity intersect to create unique challenges and barriers.

Ignoring intersectionality in Equality Impact Assessments can result in incomplete assessments that fail to capture the full extent of discrimination or disadvantage faced by certain groups.

Intersectionality should play a large role in your analysis, so don't be afraid of looking at more than one characteristic at a time, e.g., Disabled children, Black women, or Disabled Working-class Trans people.



## Process

1



### Identify Aims and Objectives

- What are the primary goals of this policy or action?
- Who is expected to benefit from these aims and objectives?
- How do these objectives align with the organisation's commitment to equality?

2



### Gather Data and Evidence

- What existing data is available to assess the potential impact on different groups?
- Are there any gaps in the data that need to be filled before proceeding?
- How reliable and relevant is the data in reflecting the experiences of diverse groups?

3



### Involve and Consult Stakeholders

- Who are the key stakeholders that need to be consulted?
- How will you ensure that all relevant voices, including marginalised groups, are heard?
- What methods will be used to gather meaningful input from stakeholders?

4



### Assess the Impact on Equality

- Which groups are likely to be positively or negatively affected by this policy?
- What specific equality issues could arise from this impact?
- How will you determine the significance of the impact on different groups?

## Process

5



### Consider Alternatives and Mitigation

- What alternative approaches could achieve the same objectives with less impact on equality?
- How can any potential negative impacts be mitigated?
- Are there successful examples or best practices from similar situations that could be applied here?

6



### Decide Whether to Proceed, Amend, or Abandon

- Based on the assessment, is it justifiable to proceed with the policy as it is?
- What amendments could be made to reduce any adverse impacts on equality?
- Are there circumstances where abandoning the policy is the best option?

7



### Monitor the Real Impact

- How will you track the actual impact of the policy on different groups over time?
- What indicators or metrics will be used to measure success or failure?
- How will ongoing feedback from stakeholders be incorporated into the monitoring process?

8



### Review and Report

- What lessons have been learned from the implementation and impact of this policy?
- How will the findings be communicated to stakeholders and the wider public?
- What recommendations will you make for future policies based on this experience?

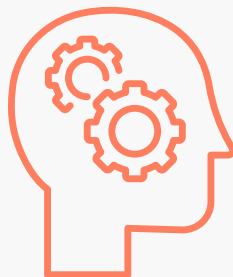
## Process

The Equality Impact Assessment process involves collecting and analysing relevant data, consulting with stakeholders from diverse backgrounds, and assessing the potential impacts of proposed actions. This helps project leads to make informed decisions that minimise the likelihood of negative consequences and maximise positive outcomes for all individuals, regardless of their identity or circumstances.

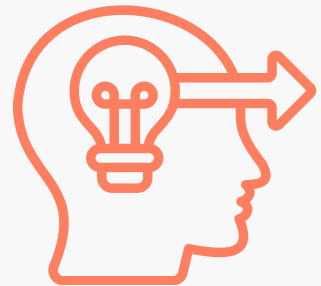
- 1** For each protected (or considered) group, you will need to identify any pre-existing data or information you have on the impact your project/action may have on these groups. This might include looking at surveys, other organisations' reviews after implementing similar workstreams, employee feedback, and customer/client/delegate feedback.
- 2** You may identify gaps in your pre-existing data. Gaps in data can make it difficult or impossible to analyse a project's impact on a group. To fill these gaps, you will need to collect your own information. This may look like conducting 1-to-1 interviews with colleagues, holding focus groups, or creating a survey.
- 3** After collecting and analysing this data, indicate on the template whether the proposed changes/project will have a positive, negative, or neutral impact on any of the groups identified, detailing the evidence you used to influence your decision.
- 4** If you foresee any discrimination/negative impact, you will have the opportunity to either:



**Stop the Project**



**Mitigate the Impact**



**Justify Moving Forwards**

## Process

To justify moving forward, an organisation must have an Objective Justification – that is

*'a proportionate means of achieving a legitimate aim'*

### To prove objective justification:

- The aim must be an honest, objective consideration, and not in itself discriminatory (for example, ensuring the health and safety of others would be a legitimate aim).
- If the aim is simply to reduce costs because it is cheaper to discriminate, this will not be legitimate.
- Working out whether the means is 'proportionate' is a balancing exercise: does the importance of the aim outweigh any discriminatory effects of the unfavourable treatment?
- There must be no alternative measures available that would meet the aim without too much difficulty and would avoid such a discriminatory effect: "if proportionate alternative steps could have been taken, there is unlikely to be a good reason for the policy or age-based rule" (Equality Human Rights Commission 2019).



# Template

## Project, Policy, Process, or Action:

e.g. website, EDI policy, onboarding process, team building event

## Aims:

What do you hope to achieve with this decision? What is the desired outcome?

## Assessment completed by (including consultants):

## Date started:

Characteristic	Predicted Impact	Details & Evidence of Impact	Detailed Action: N/A, Stop, Mitigate, or Justify	Responsibility
<b>Race and Ethnicity</b>	E.g., Negative	E.g., this action will disproportionately impact ethnic minorities due to... This worsens when considering ethnic minorities who are working-class, disabled or LGBTQ+	E.g., no actions needed; stop the project as we cannot justify the consequence nor avoid discrimination; mitigate the disproportionate impact by...; justify going forward despite discrimination because...	Role(s)
<b>Sex</b>				
<b>Gender Reassignment</b>				
<b>Pregnancy &amp; Maternity</b>				
<b>Sexual Orientation</b>				
<b>Age</b>				

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# Template

Characteristic	Predicted Impact	Details & Evidence of Impact	Detailed Action: N/A, Stop, Mitigate, or Justify	Responsibility
Disability				
Marriage & Civil Partnership				
Religion & Belief				
Class				
Caste				
Housing Status				
Parents & Carers	<i>E.g., Positive</i>	<i>E.g., the event occurs during working hours, is child friendly, as well as provides free licensed childcare on-site. The speakers will also be recorded for viewing at another time. There are arrangements to support people to join live-virtual.</i>	<i>E.g., N/A</i>	
Children				

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