

Equality Impact Assessment Form Section One – Screening

Name of Function, Policy or Strategy:

FPP: No. 7: Treasury Management Policy – Investment of Surplus Cash

Officer completing assessment: **Charles Porter, Director of Finance**

Telephone: **07738 480938**

1. What is the main purpose of the strategy, function or policy?
To establish a framework for the placement of surplus cash.
2. List the main activities of the function or policy? (for strategies list the main policy areas)
<ul style="list-style-type: none">• Scope• Objectives• Controls• Investment Policy• Identification of Cash Surplus Balances• Investment of Surplus Cash Balances• Risk Management• Reporting Investment Activities
3. Who will be the main beneficiaries of the strategy/function/policy?
The Trust
1. Use the table overleaf to indicate the following:- <ol style="list-style-type: none">a. Where do you think that the strategy/function/policy could have an adverse impact on any equality group, i.e. it could disadvantage them?b. Where do you think that there could be a positive impact on any of the groups or contribute to promoting equality, equal opportunities or improving relations within equality target groups?

		Positive Impact – it could benefit	Negative Impact – it could disadvantage	Reasons
GENDER	Women	No	No	No negative or positive impact.
	Men	No	No	No negative or positive impact.
RACE	Asian or Asian British People	No	Yes	If English is not first language this may affect employees ability to understand policy and/or procedure
	Black or Black British People	No	Yes	If English is not first language this may affect employees ability to understand policy and/or procedure
	Chinese people and other people	No	Yes	If English is not first language this may affect employees ability to understand policy and/or procedure
	People of Mixed Race	No	Yes	If English is not first language this may affect employees ability to understand policy and/or procedure
	White people (including Irish people)	No	Yes	If English is not first language this may affect employees ability to understand policy and/or procedure
	Disabled People	No	Yes	Disability may affect employee the employees ability to understand the policy and/or procedure
	Lesbians, gay men and bisexuals	No	No	No negative or positive impact.
	Trans people	No	No	No negative or positive impact.
AGE	Older People (60+)	No	No	No negative or positive impact.
	Younger People (17 to 25) and children	No	No	No negative or positive impact.
	Faith Groups	No	No	No negative or positive impact.
	Equal Opportunities and/or improved relations	No	No	No negative or positive impact.

Notes:

Faith groups cover a wide range of groupings, the most common of which are Muslims, Buddhists, Jews, Christians, Sikhs and Hindus. Consider faith categories individually and collectively when considering positive and negative impacts.

The categories used in the race section refer to those used in the 2001 Census. Consideration should be given to the specific communities within the broad categories such as Bangladeshi people and to the needs of other communities that do not appear as separate categories in the Census, for example, Polish.

5. If you have indicated that there is a negative impact, is that impact:			
		Yes	No
Legal (it is not discriminatory under anti-discriminatory law)			X
Intended			X
Level of Impact		High	Low
			X
If the negative impact is possibly discriminatory and not intended and/or of high impact then please complete a thorough assessment after completing the rest of this form.			
6(a). Could you minimise or remove any negative impact that is of low significance? Explain how below:			
The negative impact is minimised by the Equality Statement on Page 6 which states that staff can seek assistance from Staff within the Human Resources Department.			
6(b). Could you improve the strategy, function or policy positive impact? Explain how below:			
N/A			
7. If there is no evidence that the strategy, function or policy promotes equality, equal opportunities or improves relations – could it be adopted so it does? How			
This Policy will be monitored by Human Resources informing the author of any impact that has been brought to their attention via their assistance as stated above in 6(a).			

Please sign and date this form, keep one copy and send one copy to the Trust's Equality Lead.

Signed:

Charles Porter

Name: **Charles Porter**

Date: **March 2018**