

Diversity Unit

Equality Screening and Impact Assessment

CE Workforce planning

September 2023

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Equality Screening and Impact Assessment

Introductory Guidance

What is it?

Equality screening and impact assessment (ESIA) helps us consider the effect of our policies and practices¹ on different people. It helps us minimise negative impact and potential discrimination and promote opportunities to advance equality, inclusion and good relations between different groups of people.

It is deliberately a time and resource intensive process because it encourages us to slow down and build in perspectives from a range of different people.

There are **two** main parts to equality screening and impact assessment.

- **Part 1 (Equality Screening):** The first part of the form presents a set of equality screening questions. These questions help determine whether the policy is relevant to equality and whether it needs to go through an equality impact assessment.
- **Part 2 (Equality Impact Assessment):** The second part of the form, is the equality impact assessment. This is where a panel of people review the proposed policy, particularly thinking about its impact on different groups of people, trying to identify and counter any potential negative impact and promote any opportunities to enhance equality. The panel suggests actions for the policy owner to adopt.

Why do we do it?

The process helps us improve our policies and build equality into our work. Equality screening and impact assessment (ESIA) helps us consider the potential impact of what we do on different groups who are susceptible to unjustified discrimination, some of whom are legally protected against this, whether by UK or other law. It helps us demonstrate that we have proactively considered equality when developing our policies.

When should we do it?

Assessing the impact on equality should start early in the development of a new policy or review of an existing policy. Assessing the impact on equality should be ongoing rather than a one-off exercise because circumstances change over time, so equality considerations should be taken

¹ Consistent with its broad definition in Section 75 of the Northern Ireland Act and other equality legislation, this guidance uses the term 'policy' as a shorthand for policies, practices, activities and significant decisions about how we work and carry out our functions.

into account both as the policy is developed and also as it is implemented. The guidance here is to help assess the impact on equality before the policy is implemented.

It takes some time to properly set up an equality impact assessment meeting if one is needed, so the equality screening questions should be considered as early as possible once the policy is drafted. If an equality impact assessment is required it will take a little time to identify a chair, a note-taker, a diverse panel and to set up the meeting arrangements.

In addition once the meeting has taken place there are likely to be actions to be implemented before the policy is launched. All this needs to be considered when determining the best time to address equality screening and impact assessment.

When we are implementing a policy that has been developed elsewhere, for example by a government department, or by a partner organisation we also need to assess the impact on equality. Although responsibility for the policy itself rests with the organisation that developed it, we may have choices in how it is implemented that can help eliminate potential discrimination and promote equality, inclusion and good relations.

How do we do it?

Consider the purpose of the policy, the context in which it will operate, who it should benefit and what results are intended from it. Reflect on its potential impact on people with different equality categories and think about which aspects of the policy, if any, are most relevant to equality. Answer the equality screening questions to determine whether an equality impact assessment meeting is necessary.

If an equality impact assessment panel meeting is necessary, identify someone to chair the meeting, and someone to take the notes. The chair and note-taker play a crucial role and specific guidance has been developed to support them:

- ESIA Guide for Chairs;
- ESIA Guide for Note-takers

A diverse panel should be approached, including a range of colleagues from different teams / departments / countries / regions as appropriate, some of whom should be directly involved in or impacted by the policy.

Panel members should be sent the part-completed ESIA form (i.e. Part 1 and Section 1 of Part 2) and the policy documents, giving them at least a full week to read them and prepare for the meeting.

We particularly focus on the following equality categories (many of which are protected by equality legislation in the UK and beyond):

- Age
- Dependant responsibilities (with or without)
- Disability

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- Gender including transgender people
 - Marital status / civil partnership
 - Political opinion
 - Pregnancy and maternity
 - Race or ethnic origin
 - Religion or belief, and
 - Sexual identity / orientation.

Invariably there are other areas to consider including socio-economic background, full-time / part-time working, geographical location, tribe / caste / clan or language, dependent on the country.

We also encourage consideration in support of our commitments towards decolonisation, particularly thinking about tone and positioning of the UK and other countries, especially but not only when policies are being developed from the corporate centre. The aim here is to raise awareness of colonial privilege so it can be avoided.

There should be reflection on what is being proposed against the organisation's values (open and committed; expert and inclusive; optimistic and bold).

The impact assessment panel meeting must be held, and Part 2 of this tool used, when you still have time to make changes, otherwise it does not have real value. As such the panel meeting should be held **at least one month** in advance of the planned implementation date for the policy.

After the meeting the action points identified by the panel are reviewed by the policy owner and implemented as appropriate. The policy owner confirms implementation of the action points or provides a planned date for implementation (and outlines a justification for any action points that won't be taken forward) and then signs off and sends the completed form for audit by the Diversity Unit.

Northern Ireland

There is specific legislation in Northern Ireland which requires a more detailed process of equality screening and impact assessment for policies that are deemed to have high relevance to equality. This includes external consultation with relevant contacts and organisations. Given this, there is a need to confirm whether the proposed policy affects anyone in Northern Ireland. **If it does, all parts of the form need to be completed and the guidance at Annex A must be read and followed.**

Wales

As a public body operating in Wales there is a legal requirement for us to produce any information intended for the general public in Wales in the Welsh language. Therefore there is

a section in the form seeking confirmation of whether the Welsh public will be affected by the proposed policy.

Procedural notes

Please note, the document will be considered invalid for audit if not correctly completed.

- Complete Part 1 (Equality Screening) ensuring the Record of Decision is signed and dated by the policy owner (a digital signature including typed name is acceptable)
- If Part 2 (Equality Impact Assessment) is required progress to Part 2
- If Part 2 (Equality Impact Assessment) is **not** required, submit the Part 1 (Equality Screening) form to the ESIA inbox for audit by the Diversity Unit.

Submitted tools which pass the audit are uploaded to SharePoint and form part of a database of examples accessible by colleagues.

The audit process informs Diversity Assessment Framework (DAF) moderation in relation to the use of EDI planning tools. Please note this applies only to full use of the ESIA i.e. Parts 1 and 2. Any uses of Part 1 only do not count towards the DAF and are not uploaded to SharePoint.

Part 1: Equality Screening

Policy Details²

Title of policy	CE Global Workforce Planning solution
Name of policy owner	Jon Coffey / Joolz Pohl
Planned implementation date	25/10/2022 – 31/03/2024

Background

Provide brief background information about the policy or change to it. Include rationale, intended beneficiaries and expected outcomes. Use as much space as you wish, the table below will expand as you enter information.

The British Council has developed a new global operating model for Cultural Engagement to achieve its strategic objectives of improving sustainability, efficiency and impact measurement. The model will be implemented across all strands of the CE business, whilst also incorporating changes to the Global Network (GN) staffing structure.

For the new model to work we need to work smarter through others and utilise a more flexible and agile deployment of resources. However, currently we don't have a standardised mechanism, or the data insight needed to enable this, either from a strategic planning perspective or an operational delivery one.

The workforce planning solution being addressed in this ESIA form is one of the substantial digital improvements that underpins the new global operating model and one of the key dependencies of the successful implementation and long-term sustainability of it.

A successful global workforce planning solution contributes to the areas around commercial sustainability and improved efficiency by helping to sustain the reduced headcount.

This global workforce planning technical solution will consist of multiple components and integrate with existing core British Council IT systems to enable the longer-term sustainability and efficiency of the new CE global operating model.

This tool will plan for:

² Consistent with its broad definition in Section 75 of the Northern Ireland Act and other equality legislation, this guidance uses the term 'policy' as a shorthand for policies, practices, activities and significant decisions about how we work and carry out our functions.

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- **CE staff globally**
 - **Staff who are allocated to spend time on CE activities (such as Marketing teams and Global Network)**

It will also be used to support applications for:

- **Local and international consultants who engage with CE (for contractor database)**

It excludes Non-CE staff (E&E, corporate, regional business support staff (BSS))

The new tool will support in the below areas:

- **Global visibility of resource data**
- **Staff planning**
- **Timelogging**
- **Capability profiling**
- **Flexibility of staff movement (Reassignments)**

Managing the above will enable staff at a Senior level and at a programme, project and team level to plan resources effectively and request support internally which will result in a reduced number of external recruitment requests, thus, commercially supporting the new business plan to reduce headcount.

Equality Screening Questions

To determine if an EIA is necessary, please answer the following by ticking yes, no or not sure:

Question	Yes	No	Not sure
Is the policy potentially significant in terms of its anticipated impact on employees, or customers / clients / audiences, or the wider community?	x		
Is it a major policy, significantly affecting how programmes / services / functions are delivered?		x	
Might the policy affect people in particular equality categories in a different way?			x
Are the potential equality impacts unknown?	x		
Does the policy have the possibility to support or detract from our efforts to promote the inclusion of people from under-represented groups?			x
Will the policy have an impact on anyone in Northern Ireland?	x		
Will the policy need to be communicated externally in Wales and therefore translated into Welsh?		x	
Total responses Yes / No / Not sure	3	2	2

Deciding if an Equality Impact Assessment is necessary

If all the answers to the questions above are 'no' then an equality impact assessment is not needed. Please move to the '**Record of decision**' section below and record confirmation of this by indicating "is not required".

If you answered 'yes' to any of the questions, then an equality impact assessment is necessary. Please move to the '**Record of decision**' section below and record confirmation of this by indicating "is required" **then progress to Part 2**.

If you did not answer 'yes' to any of the questions but there are any 'not sure' responses then please discuss next steps further with the Regional EDI Lead or with the Diversity Unit, who will help you decide if an equality impact assessment is necessary.

Record of Decision

I confirm an equality impact assessment is required .
Policy Owner (Name): Jon Coffey / Joolz Pohl
Policy Owner (Role): Head of Global Resource Planning / Director CE Operations
Policy Owner (Signature): J Coffey)
Country / Business Area and Region: Global / Cultural Engagement
Date: 06/07/2023

Procedural notes

Note 1: If an equality impact assessment **is required**, please complete Part 2, Section 1 and send this part-completed form to the panel along with any relevant background documentation about the policy **at least one full week** prior to the EIA meeting. This should include the draft policy and any supporting data or relevant papers.

Note 2: If an equality impact assessment **is not required**, please send this screening section (i.e. Part 1) of the form for audit by the Diversity Unit.

Part 2: Equality Impact Assessment (EIA)

Section 1

This section is to be completed before the EIA panel meeting and sent at least **one week** in advance to the panel along with the policy and other relevant documents.

Title of Policy	CE Global Workforce Planning solution
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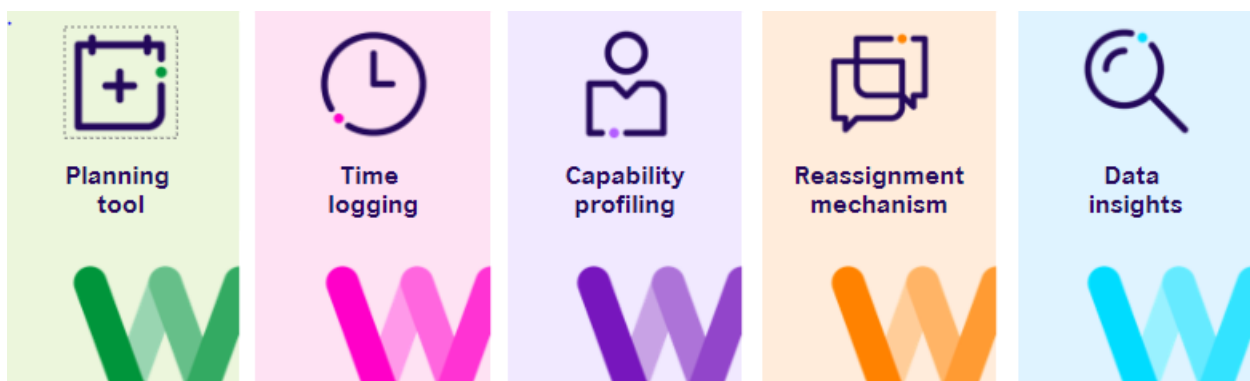
1. Please summarise the purpose of the policy, the context in which it will operate, who it should benefit and what results are intended from it.

The Workforce planning solution is a global programme, being implemented across Cultural Engagement.

We know in the new operating model that we will have less staff. Alongside other changes, it is critical that we find a way to allocate work and so utilise our time in the most efficient and effective way possible.

- We currently we don't have a systematic global way to plan/have sight of who is working on what programmes/projects and whether they have capacity and capability for additional work.
- We can't see where there are gaps in programme resource that might be filled by someone whose work is ending elsewhere.
- We don't have a global view of our staff and their capability and so don't have insight that would inform strategic workforce planning.

The workforce planning solution is a global technology solution, underpinned by clear business processes and governance (and utilising existing HR policy), that will provide these views in an accessible way. It consists of 6 components, which are



2. Please explain any aspects of the policy you've been able to identify that are relevant to equality. This will contribute to the equality-focused discussion the panel will have.

1) Opportunity: We will have the facility to search for staff based on their availability, capability and, if relevant, location. This will enable us to identify people who potentially have the capacity and capability for additional work. It will help us to identify people whose work is ending and who may be utilised elsewhere. A mechanism to enable this movement is one of the core components of the solution. This will not apply to all opportunities as recruitment rules apply (it will be driven by duration and/or % commitment).

Given that we are likely to have a greater number of 'location neutral' opportunities, we would expect it to open-up opportunities for people to work across areas they wouldn't previously have had access to (cross-pillar, cross-region, although important to clarify that we are not referring to physical mobility). This will need to be managed to avoid creating 'backfill' situations and opportunities will not be open to everyone.

2) The range of people that are responsible for planning in the system may result in a difference in the way people interpret capacity. A set of clear guidelines are vital to support staff plan in the same way to ensure all individuals are given the same opportunity if one arises.

3) Culture: People are often wary of indicating they have spare capacity, as they feel it could jeopardise their job security. It is important that we are clear that we are reporting on capacity to highlight where work may be redistributed, to avoid unnecessary recruitment.

4) There may be instances where we are bound by local labour laws, which may impact the opportunities available to people.

3. Please outline any equality-related supporting data that has been considered. This could include consultation with Trades Union Side or staff associations, equality monitoring data, responses from staff surveys or client feedback exercises, external demographic and benchmarking data or other relevant internal or external material.

-
- 1) An ESIA panel met to discuss the CE Global Workforce Planning solution on 03/03/2022. Required actions were highlighted all of which have been completed (4 – carry out ESIA 20/07/2023).

1- A: Provide training material for those on leave. *R: training for each component has been created and distributed to the relevant people as each component is rolled out.*

2- A: Create User journeys to support individuals. *R: Case studies and user stories have been created to support the tender / inform UAT testing / training – case studies have been presented to the EWC.*

3- A: Clear communication on what the new system will be used to monitor (timelogging specifically). *R: continuous communication at the relevant levels has and will continue to take place throughout the programme.*

4- A: Carry out another ESIA when the final policy has been written and tool procured. *R: Taking place 20/07/2023*

- 2) Assessed accessibility against the WCAG recommendations that have been provided by the Digital, Partnerships and Innovations team. The supplier has committed to address these within the next twelve months in subsequent versions of the software.
- 3) Extensive discussions with the EWC have taken place regarding the programme, its scope and roll-out. We have just received their opinion/recommendations and we are in the process of responding to these.
- 4) Numerous workshops / training sessions / briefings / communications have taken place. Though not focused on EDI specifically these interactions are aimed at providing the necessary information and support throughout the programme to build confidence in the new system and drive engagement.

Section 2

This section captures the notes of the Equality Impact Assessment panel meeting.

Title of Policy³:	CE Workforce Planning Programme
Date of EIA Panel Meeting:	12 September 2023
Name of Panel Chair:	Javed Iqbal

1. Please list the names, roles / business areas and geographical location of the panel members. If contributions have been received in writing by people who could not attend please list their details too and note 'input in writing' by their name.

Panel

MW Medy Wang (China)
HFB Hafiz Furqan Bashir (MENA)
MN Maria Nomikou (Greece)
GH Grant Huang (China)
UA Uchechi Awaraka (Nigeria)
MP Meera Patel (English and Exams)
SK Saman Khalid (UK)
TD Thomas Dearing (UK) (Education and Society)
KN Katherine Nicol (Partnerships and Innovation)
BN Birgit Neubauer (WE)
SS Shakia Stewart (Partnerships and Innovation)
LC Loredana Ciobanu (2nd. half) (Romania)

GRP

JC Jon Coffey (Head of Global Resource Planning)
EF Emily Farrelly (GRP Lead)
Note taker: Ramona Harris (GRP Manager)

³ Consistent with its broad definition in Section 75 of the Northern Ireland Act and other equality legislation, this guidance uses the term 'policy' as a shorthand for policies, practices, activities and significant decisions about how we work and carry out our functions.

2. Summarise the main points made in the discussion, noting which documents were reviewed. Note any points relating to clarity / quality assurance as well as points relating to equality issues.

Panel

MW: Expressed concern that the panel is under represented by those most impacted by the new processes.

JC: Explained that many consultations/engagements have been widely made with colleagues worldwide since 2022, including previous ESIA panels and collaboration with the EU Work Council (EWC). However Global Resource Planning (GRP) team will welcome any other feedback from CE colleagues.

WfP Briefing

EF: Made a short presentation about WfP, outlining what it is, the benefits to British Council and the roll out schedule.

She reminded the panel of the progress since the 1st ESIA meeting protocol documents, user guides, training material, etc.

She explained that a separate ESIA panel was organised for Interim reassignment process because of Covid. Post Covid, GRP is reviewing and consulting regional colleagues to design an updated process.

JC: Explained that EWC was approached in early 2022 followed by proposal submission in Oct 22 with formal discussions and a demo of Tempus. Now awaiting EU local work councils to also provide input.

HR Leads are going to look at legislative issues for each country. Current status is that they have navigated first part and have reported no major concerns.

Jl: Asked if EWC raised any EDI issues.

Action: JC will check and revert later.

Planning on Tempus

EF: Confirmed that ESIA is for all components of WfP.

MW: Planning can identify additional resources with some capacity but what if individuals are overloaded? Even though planning managers can't plan more than 100% FTE but in reality, people can be over loaded. How can this be resolved?

JC: Team Leads can use reassignment process to try and redistribute work. Capability and capacity reports can be used to identify potential suitable resources. If no one is identified, then they need to re-prioritise the work.

If someone is over planned, managers can write at country and regional level to review wider resources to get resourcing help.

Time logging

EF: confirmed that people should time log actual hours. Tempus will send an auto email to senior managers when individuals are logging over 100% to highlight that action needs to be taken to manage work load in the team.

JC: Added that if time logging is 120% or more in consecutive months, we suggest they discuss with their LM to find a solution.

HFB: Observed that when resources have additional role like EDI, safeguarding or similar that is 15% of their full time, what will happen if they're expected to time log 100% to substantive role as well.

EF: Explained that the system pulls WBS from outside CE including EDI, environment issues, etc. For those with multiple roles, they can plan and log time against these WBS's.

JC: Agreed that if people plan correctly, this allows us to capture the various work they do.

HFB: Expressed concern that people work at varying speeds, e.g., no standards on spreadsheet work. Could it be a performance issue?

JC: The reports are at high level only and not accessible widely. It is used to help future planning resources.

He added that time logging is not linked to performance evaluation. We can't compare two people doing the same job, we recognise that people work at different speeds. From our experience, we know that people can mis-interpret time logging guidance or have different agendas and over inflate some of their time logs.

For people to accept time logging, our culture needs to change. With clarity on what the data captured on Tempus is used for and more learning over time, people will complete time logs accurately. We need to foster a shared understanding in the regions between individuals, Country Directors and the business within the organisation. This is instrumental on how this is taken up; how compliant people are and the approach to accuracy of time logs.

These are the sorts of conversations that we will be having over the coming months as we plan the time logging roll out to the rest of CE after Christmas. We need to start engaging with key players on some of the practical kind of messages and principles of time logging.

MN: Expressed concern that in smaller overseas offices with few resources, many colleagues require to do parts of different operational roles as well as doing CE roles, e.g. Head of Edu

or Arts. It's difficult to reflect on planning, and time logs will be over 100%. These people are in challenging situation and do not need additional stress.

JC; Advised that less is more. The perception is that time logging is granular. We want to keep it simple, to understand how the resource is actually spending their time. It is useful for consultation and ensure efficient use of people's time. People can log additional hours that don't fall within a project to business / admin option which helps show they are working hours but doesn't take time or add complication to time logging.

SS: Said that there are dangers of mis-tracking time logging – under or over. People need to be able to log-under hours if it applies – feels there is a fear of doing this at the moment (in the UK). How to deal with this?

JI: Added that there is a fear of under reporting and risk losing a post. Also, of perception by senior managers that the team is not using resources properly.

Assurance needed that there will be no negative repercussions resulting from logging actual hours.

JC: Stated that it is important to set the culture in each organisation (country office) such that these fears are mitigated. This will be necessary if we are to ensure that the aims/benefits of time logging move beyond aspirational – we issue principles and guidance, but it will take time to embed.

Training for LMs is a good suggestion; they need to have the same interpretations of time logging principles and guidance, so that they can sense check and discuss within their teams. LMs may need more guidance on what to look for, what's the benchmark when sense checking.

Time logging will evolve and is a long-term process. The guide and protocol may not be enough now without the education/training and analysis of the data which we will monitor to understand different behaviours/attitude to time logging. These are the things we will continue to work on to get it right in the future.

MN: Asked whether people can time log actual operations work?

JC: Advised that in the regions, people should discuss with LMs the provision to log outside of global programmes with FPA agreement.

JI: Commented that this is positive for business support, reporting and management.

GH: Commented that when working across teams, we should discuss and agree with LMs, and project leads on planning our time. Also discuss if extra resource is needed through Reassignment?

EF: People are employed to do certain projects and just like before their work was planned in sheets/ workbooks but now, they will be planned in Tempus.

Reassignment process

MW: Asked what does 'Location neutral' mean? This is in context of Reassignment procedure and how it is related to EDI.

JC: Explained that since covid with remote working facilities available, people don't need to be in situ and can continue to work from home when work allows it.

Reassignment within regions can take advantage of having people in different countries in the region with the right capacity and capability to potentially take a reassignment, as we saw during covid there is less necessity to be in a physical place.

MW: Expressed that there should be a clear process with consistency and fairness on the ground to guide managers. LMs need to use robust criteria to make decisions.

JC: Explained that the Reassignment is still in design and there may be slight variations in regions. He assured that individual LMs can't make decisions - it is a formal procedure.

MW: Wanted to know who makes up the panel and signs off decisions?

JC: Replied that a panel comprising senior management in each region, e.g., CD's and regional leads in Americas chair and make decisions. It is possible that Interpretations of each Reassignment by panel members may be different, but the panel has a shared interest in finding the resources.

BN: Said that Reassignment is brilliant. It gives people the opportunity to learn from experience. She also said that there should be fair access and transparent - variations must be consistent.

SS: Asked if Reassignment is for CE only?

EF: Replied yes but set up to meet British Council standards.

JI: Remarked that it could be global as well.

JC: Clarified that it is for CE colleagues and those focused on CE work including CD's.

JI: Thought that it is good but not quite there yet, in terms of getting selected for positions and opportunities and not just white men with certain schooling and education. This opens all those doors which were not there before.

Reassignment and Capability profile

EF: Said that Reassignment can be good for gaining new experience. She explained the process briefly including regional forums and clarified that decisions will be made after a light touch interview if multiple people meet the criteria.

JC: Added that it is a data led process. The system is used to only indicate capacity and capability, but people will need to apply and go through the Reassignment process. If an overloaded team cannot re-distribute the work within their team, then they can use this process, initially within region but we are exploring global too. Some people with the required capability who also have capacity can be approached.

MW: Said that from an EDI perspective, if the majority of a person's tasks/roles can't be time logged in projects how will time logging and capability be used?

JC: Clarified that the data comes from planning data for capacity and capability profile.

SS: Expressed concern about how people complete their capability profile as statistics has shown that men tend to claim more experience than reality, particularly when applying for jobs whilst women do the opposite. Some training for LMs to enable them to have conversations with managees so that capability profiles are as accurate as possible would be helpful.

JC: Asked the group if they had any advice on how to tackle this and agreed that this is tough, but it goes back to setting the culture in the organisation which will not happen overnight. Training LMs is a good point.

JI: Asked if Reassignment can be used for resources at risk of redundancy? Is the system capable of showing the person for reassignment?

JC: Replied that Reassignment is about work that was being redistributed, rather than a person moving roles. So, the fact that they were at risk was not relevant. If they have the right experience/skills, they can apply and be selected for Reassignment, but some people may not wish to take on other work if they are at risk

Reassignment and Capacity

TD: Said that Reassignment needs spare capacity on the bench to take on some work. Behavioural change is needed so that Snr. Mgmt. will allow team members to take on reassignments.

EF: Explained that a bi-weekly forum with senior members will be established to have conversations/comms as it is vital to discuss the data. Exciting opportunities should be seen as positives - members should discuss with LMs and find ways for team resources to work, for e.g., if someone in a team has 40% capacity (during a slow period in their project) but the reassignment needs 50%, Team Leads and LMs could re-distribute some work in the team to free up the 10% needed for the person to take up a Reassignment or most often the team needing support would be more than happy with 40% of someone's time.

Alternatively, two people could share the Reassignment. It does involve a culture change.

JC: Stated that management's POV is that currently staffing is so tight. In the UK Reassignment process, when people apply and are successful, back-fill becomes a problem as the bench has no slack, therefore, only those with capacity will be considered.

TD: Agreed that back-fill is an issue with no slack now but good to recognise potential when there is slack in future.

MN: Stated that Reassignment is good as people have the opportunity to gain more experience in different areas. But people need to feel they have job security. She is concerned that Reassignments can only be for people with capacity.

EF: Reiterated that back-fill will be an issue if re-assignees don't have capacity. Teams should encourage planning to be accurate.

MN: Reiterated that some managers in her office like Head of Edu are not using all their time on actual education work when they have to deal with operational work. They will not have capacity and not identified for Reassignments.

JC: Agreed that the process could potentially miss some people as MN pointed out. Advertising opportunities is something to consider further down the line, to address these people without creating the backfill problem. But in the first phase the challenge is to get the process up and working, that assignments are getting filled and create the benefits we envisaged.

Action: Consider advertising roles – work on reassignment process

BN: Stated that it is an interesting idea, but workload and back-fill issue is concerning.

EF: Agreed that it is a valid point – access for overloaded people is unfair. We must have conversations within forum and find ways for teams to open up reassignments to busy people.

BN: Suggested that we must work with LMs as they often don't know how to take it forward.

JI: Asked if there is a process map. It would be good to have the process outlined.

JC: Confirmed that it was already shared at the initial screening meeting.

JI: Asked that it be shared with panel again.

**TD uploaded the said doc on the Chat.*

LC: Suggested an initiative in her previous company to help solve back-fill issue – called 'Swap & share'. With remote working, it could work for some roles.

EF: Stated that it is a good idea and can be investigated. L&D is extra benefit for Reassignment. Data can support later but not now.

JC: Agreed that it is a good idea but limited opportunity in CE Workforce Planning now. This type of initiative sits with HR.

Tempus system

MP: Raised a system point; once all the components have been implemented and after checks done, is there an opportunity to give feedback later?

EF: Assured that yes, users can give feedback later. We in GRP are working with vendor as we roll out the programme. An upgraded version is due in December – we can then decide whether to upgrade or stay with the current version. For e.g., last week – email notification was added as requested. They are working through the accessibility issues we raised and improving on them with each version.

JC: Confirmed that there is a note in the roadmap that Tempus meet British Council accessibility standards. Vendor's contract includes the need to meet these standards.

3. Capturing information about the protected groups / characteristics

Based on the notes of the discussion (section above), record here any potential for negative impact identified and any opportunity to promote equality, inclusion and good relations. (The header row in the table will repeat if the table continues on to a new page.)

Equality categories (with prompts to guide full consideration)	Potential for negative impact	Opportunity to promote equality, inclusion and/or good relations between different groups
Different ages (older, middle-aged, young adult, teenage, children; authority generation ⁴ ; vulnerable adults)	<p>MW: Is concerned that older people may not have specific capabilities, like good at digital and miss out on some reassignments</p> <p>UA: Countered that younger colleagues will miss out on reassignments that need management experience.</p> <p>MP: Suggested that capability profile may need different medium levels so that Pb7 can select.</p> <p>JC: Explained that it is dependent on what reassignment manager is looking for. It's a supply & demand situation – reassignments that come in can vary widely. A broad range of work is anticipated to come in.</p>	TD: said that people should be encouraged to update their capability profile regularly so that they will be identified for reassignment opportunities.

⁴ The term 'authority generation' refers to cultural or national norms and customs in relation to particular age generations. For example, in some countries older people are held in high esteem and are considered to have a form of social authority by virtue of age. In addition, different generations (Generation X, Y, Millennials, Baby Boomers) are also thought to have varying common attitudes towards authority, with [for example Baby Boomers commonly questioning authority.](#)

Equality categories (with prompts to guide full consideration)	Potential for negative impact	Opportunity to promote equality, inclusion and/or good relations between different groups
	The type of work usually based on Pb.	
Different dependant responsibilities (childcare, eldercare, care for disabled and/or extended family)	<p>MN; sought confirmation that when time logging there is no need to state when you work and asked whether completing time logging would be quick. People are already so busy – this added task can be stressful.</p> <p>EF: confirmed that there is no need to put in the time, just hours for each day. Tempus timesheet is user friendly and as long as the WBS has been planned on Tempus, completing weekly time logging will take about 5 min.</p> <p>JC: Added that for convenience, time logging can soon be done on mb phones.</p> <p>Jl: commented that this is a good idea</p>	
Disabled people (physical, sensory, learning, hidden, mental health, HIV/AIDS, other)	<p>SK: Asked how to encourage disabled people to apply for Reassignments opportunities?</p> <p>Jl: Asked if he could email ideas?</p> <p>JC: said that we would be interested to get suggestions.</p>	

Equality categories (with prompts to guide full consideration)	Potential for negative impact	Opportunity to promote equality, inclusion and/or good relations between different groups
	<p>Jl: LMs should get training to support their line managees.</p> <p>JC: Added that this is part of a wider conversation and not just limited to Workforce Planning programme.</p> <p>MN: Suggest asking for feedback from physically disabled.</p> <p>Jl: Reminded the panel that Accessibility rating is being looked into.</p>	
<p>Different ethnic / racial and cultural groups (majority and minority, including Roma people, people from different tribes / castes / clans)</p>	<p>SS: Stated that some cultures are sensitive to absenteeism and will overestimate the time planned and/or time logged for each project. They need to feel that it is safe to plan and time log accurately. We need to get the message right.</p> <p>Jl: Agreed that it is a concern – LMs need to manage plans well. Also asked how to mitigate.</p>	<p>SS: Suggested that someone in region/country needs to refine the comms to address respective country/region's specific concerns about this. She also suggested drop-in sessions where people can ask difficult questions including sick leave.</p>
<p>Different genders (men, women, transgender or intersex people, other issues)</p>	<p>SS: Reminded that women tended to under value their skills – what measures are in place to address this in the reassignment process?</p>	<p>Time logging is the opportunity for individuals to collect evidence of over working and discuss with LMs about work load and other responsibilities.</p>

Equality categories (with prompts to guide full consideration)	Potential for negative impact	Opportunity to promote equality, inclusion and/or good relations between different groups
	<p>Jl: Also reminded that women have the added pressures in caring responsibilities. Younger women who are raising families are very stretched and may feel that they can't take up development opportunities and don't apply for reassignments.</p> <p>Jl: stated that men too have dependents' responsibilities. One heartbreaking example was a despairing colleague who felt that he was failing as a parent and a worker.</p>	
Different languages (Welsh and/or other UK languages, local languages, sign language/s)	<p>JC: said that Tempus has 8 other languages but not extensive.</p> <p>MN: CE colleagues have basic English so we don't need to worry but if workforce planning is used beyond CE, this may be an issue</p> <p>JC: Capability descriptors are simple but conscious that if English not an individual's first language, this may be difficult for them.</p>	
Different marital status (single, married, civil partnership, other)	N/A	

Equality categories (with prompts to guide full consideration)	Potential for negative impact	Opportunity to promote equality, inclusion and/or good relations between different groups
Different political views or community backgrounds (particularly relevant to Northern Ireland)	N/A	
Pregnancy, maternity, paternity and adoption (before / during / after)	<p>Jl: asked about maternity leave.</p> <p>JC: Assured that there is a provision to plan their extended absence unlike MyHR where an individual is set to 'inactive'. On Tempus planning managers can plan them in.</p>	<p>SS: Informed that there are maternity keep in touch days with LMs, where reassignment opportunities can be shared. Also, for LMs to encourage managees to refresh/update their capability profile.</p> <p>Jl: Agreed that those on maternity could apply for reassignment opportunities if they know the start dates fit in with their availability.</p> <p>JC/EF: Agreed that this a good idea and have made a note</p>
Different or no religious or philosophical beliefs (majority/ minority/ none)	N/A	
Different sexual orientations (gay, lesbian, bisexual, heterosexual)	N/A	
Additional equality grounds (such as socio-economic background , full-time / part-time working, geographical location, other ⁵)	<p>MP: Asked how to plan or time log for those on PT, e.g., on 50% FTE.</p> <p>EF: Everyone's contractual hours are imported into the system from MyHR. So, part timers' plans will reflect this and if planned over contractual hours, the plan will go red to alert the planning manager.</p>	

⁵ Any other categories people share that might impact on how the policy affects them.

Equality categories (with prompts to guide full consideration)	Potential for negative impact	Opportunity to promote equality, inclusion and/or good relations between different groups
	<p>TD: People from lower socio-economic background tend to not put forward for reassignment opportunities because they don't want to show they have capacity at all. He suggested that we need to mitigate this behaviour by giving lots of reassurance that their role is not at risk. Also explain that reassignments help them gain experience for future advancement.</p>	
<p>British Council values (open and committed; expert and inclusive; optimistic and bold)</p>	<p>N/A</p>	
<p>Alignment with our commitments to decolonise our work (positioning of UK and other countries, power, status and privilege)</p>	<p>MN: Commented that in UK such systems are mainstream. It will be perceived as a British approach that the rest of the world have to follow. Suggested that people at local level are allowed to try and practice on the system as will be new for them They can be Champions to promote it. Also, must ensure clear and sufficient comms and messages.</p> <p>Jl: Gave the e.g., of brand champions</p>	

Agreed actions

Insert additional rows for more action points and number each individual action point. (The header row in the table will repeat if the table continues on to a new page.)

Action identified by Panel	Agreed by Policy Owner (Yes / No)	If not agreed, please provide justification	Has action been completed? (Yes / No)	If not, indicate planned date to complete
1. JC to check and report on EWC's findings on EDI issues, if any.	Yes		No	Oct 23
2. GRP to investigate how to ensure Line managers are equipped to have conversations with their direct reports regarding capability profiles, so they are 'sense checked' and accurate as possible.	Yes		No	Apr 2024
3. Reassignment process is still at design stage. Panel suggested that GRP ensures that the process is clear, fair and transparent. Any regional variations must be consistent. There should be clear guidance for LMs and robust criteria for panel to make decisions. Consider how to advertise opportunities.	Yes		No	Apr 2024
4. For those from lower socio-economic background, GRP to ensure that communication reassures that applying for reassignments does not put their role at risk (since they have	Yes		No	Nov/Dec 2023

Action identified by Panel	Agreed by Policy Owner (Yes / No)	If not agreed, please provide justification	Has action been completed? (Yes / No)	If not, indicate planned date to complete
capacity), and that reassignments help them gain experience for future advancement.				
5. Reassignment process maps to be shared with panel.	Yes		Yes – Tom Dearing uploaded on the Chat	
6. Ensure that a feedback mechanism for users remains in place once the tool has been rolled out.	Yes		No	After roll out completed (after April 2024)
7. GRP to hold Vendor to the contract that requires Tempus to meet British Council accessibility standards.	Yes		No	approx. Apr 2024 (based in v8.3 of software)
8. JI to email GRP ideas for encouraging disabled people to apply for Reassignments opportunities	Yes		No	Oct Nov 2023 (?)
<p>9. On planning and time logging; GRP to identify the most appropriate person in country/region to cooperate on refining the communication to address specific country/region concerns about sensitivity to absenteeism.</p> <p>GRP also to arrange drop-in sessions for people to ask difficult questions.</p>	Yes		<p>Yes, GRP are already in contact with Regional CE Ops managers to work together on communication.</p> <p>Roll-out plans already include drop-in sessions after roll-out of each component.</p>	

Sign-off by Policy owner

I confirm that the policy has been amended as identified in the **agreed actions** table above. Any actions planned but not yet completed will be implemented before the policy is introduced. If the policy has an impact on people or functions in Northern Ireland, I confirm Annex A has also been completed. Please ensure the majority of agreed mitigating actions have been taken before the policy owner signs and the tool is submitted for audit.

Policy Owner (Name): Jonathan Coffey

Policy Owner (Role): Global Head of Resource planning

Policy Owner (Signature): *J. Coffey*

(A typed signature is sufficient)

Country / Business Area and Region: UK, Cultural Engagement.

Date: 13/10/2023

Procedure Note

Once the identified actions have been completed the Policy Owner (or someone acting on their behalf) must email the completed ESIA form for audit by the Diversity Unit.

Annex A: Policies with an impact in Northern Ireland

In accordance with the Guide for Public Authorities, policies which have a **major** impact on equality will share some of the following factors:

- they are deemed to be significant in terms of strategic importance;
- the potential equality impacts are unknown;
- the potential equality and/or good relations impacts are likely to be adverse or experienced disproportionately by groups who are marginalised or disadvantaged;
- the policy is likely to be challenged by a judicial review;
- the policy is significant in terms of expenditure.

Policies which have a **minor** impact on equality will share some of the following factors:

- they are not unlawfully discriminatory and any residual potential differential impact is judged to be negligible;
- aspects of the policy are potentially unlawfully discriminatory but this possibility can readily and easily be eliminated by making the changes identified in the action points at Section 4;
- any differential equality impact is intentional because the policy has been designed specifically to promote equality for particular groups of disadvantaged people;
- by amending the policy there are opportunities to better promote equality, inclusion and/or good relations.

Policies which have **no** impact on equality will share some of the following factors:

- they have no relevance to equality, inclusion or good relations;
- they are purely technical in nature and have no bearing in terms of the impact on equality, inclusion or good relations for people in different equality groups.

For policies impacting on people or functions in Northern Ireland, you must identify whether any of the issues identified by the EIA panel in the table at Section 2, Point 3 above are likely to have a **major**, **minor** or **no** impact on equality.

This consideration must be given to all the items listed in the table at section 2, Point 3 whether they have potential for negative impact or the opportunity to promote equality, inclusion and good relations.

Equality categories	Negative / Positive impact on equality, inclusion or good relations		
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	No	Minor	Major
Age	X		
Dependants	X		
Disability	X		
Ethnicity	X		
Gender	X		
Marital status	X		
Political opinion	X		
Religious belief	X		
Sexual orientation	X		

If the answer to the above questions is NO, no further action is needed.

If **minor** impact is identified and the actions listed at Section 4 will address this, no further action is needed. Where the actions listed at point 4 will not sufficiently address the impact, additional measures that might mitigate the policy impact as well as alternative policies that might better achieve the promotion of equality of opportunity and/or good relations should be considered.

If mitigating measures and/or an alternative approach cannot be taken then the policy should be subject to full Equality Impact Assessment (EQIA) aligned to Northern Ireland's equality legislation.

If a **major** impact is identified in any of the answers above, then the policy should be subject to full Equality Impact Assessment (EQIA) aligned to Northern Ireland's equality legislation.

For guidance on completing full EQIA aligned to Northern Ireland's equality legislation, see <http://www.equalityni.org/archive/pdf/S75GuideforPublicAuthoritiesApril2010.pdf>.

A member of the Diversity Unit should be involved in any EQIAs that take place.

Record of Decision and Sign-off by Policy Owner

Please delete two of the following statements (those that do not apply).

I confirm that a full EQIA is not needed and no further action needs to be taken.

Signed by:

J. Coffey (Name) Jonathan Coffey (Role) Global Head of Resource planning (Date) 13/10/2023

Procedure Note: The Policy owner (or someone acting on their behalf) **must** email the completed ESIA form for audit by the Diversity Unit.



Prepared by the Diversity Unit
Version 2: 2 February 2022