**Equality Screening Form**

**INTRODUCTION**

The information contained in this Equality Screening Form has been extracted from the Equality Commission for Northern Ireland’s Guide for Public Authorities (2010). Additional information about the 5 parts of the form and a flowchart to demonstrate the process of completion is detailed in [**Appendix 1**](#Appendix1) of the form.

This template document and further guidance can be found by clicking the following link - [www.equalityni.org/S75duties](https://www.equalityni.org/S75duties)

**PART 1- POLICY SCOPING**

The first stage of the screening process involves scoping the policy under consideration. The purpose of policy scoping is to help prepare the background and context and set out the aims and objectives for the policy, being screened. At this stage, scoping the policy will help identify potential constraints as well as opportunities and will help the policy maker work through the screening process on a step by step basis.

Public authorities should remember that the Section 75 statutory duties apply to internal policies (relating to people who work for the authority), as well as external policies (relating to those who are, or could be, served by the authority).

**Information about the policy**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Name of Policy** | Business Case for Cross Border Concession Online Booking Fee | | | | | |
| **Is it existing, revised or a new policy?** | Existing |  | New |  | Revised |  |
| **If revised, please outline main updates:** |  | | | | | |
| **What is it trying to achieve?**  **(Intended aims/outcomes)** | Translink’s website has the facility to place bookings for Cross-Border bus and rail journeys in order to guarantee a seat reservation. As no monetary value is associated with bookings for concession passholders, Translink are experiencing clear abuse of the free-booking facility. It is proposed that a monetary value be implemented to any Concession bookings to prevent instances of abuse of the online booking system by unknowns carrying out block bookings or customers booking seats and then not using the service. Concessionary Pass holders will still avail of free transport on all Translink services under the Concessionary Fares Scheme. | | | | | |
| **Are there any Section 75 categories which might be expected to benefit from the intended policy? If so, explain how.** | Whilst it is recognised that the implementation of a Concession online booking fee could be a minor negative impact on some of the S75 categories, all customers will benefit from greater seat availability when booking online as the system will not be able to be abused as a result of block bookings. | | | | | |
| **Who initiated or wrote the policy?** | Social and e-Commerce Manager | | | | | |
| **Who owns and who implements the policy?** | Head of Commercial Operations | | | | | |

**Implementation Factors**

|  |  |  |  |
| --- | --- | --- | --- |
| Yes |  | No |  |

Are there any factors which could contribute to/detract from the intended aim/outcome of the policy/decision?

If yes, are they: (Select all applicable)

|  |  |
| --- | --- |
|  | Financial |
|  | Legislative |
|  | Other – please specify: |  |

**Main stakeholders affected**

Who are the internal and external stakeholders (actual or potential) that the policy will impact upon?

|  |  |
| --- | --- |
|  | Staff |
|  | Service Users |
|  | Other Public Sector Organisations |
|  | Voluntary/ Community/ Trade Unions |
|  | Other – please specify: |  |

##### [Other policies with a bearing on this policy](#Onefour) (please list):

|  |
| --- |
|  |

**Available Evidence**

Evidence to help inform the screening process may take many forms. Public authorities should ensure that their screening decision is informed by relevant data. The following document should help you source data - [Section 75 - Evidence Signposting Guide](https://www.equalityni.org/ECNI/media/ECNI/Publications/Employers%20and%20Service%20Providers/Public%20Authorities/S75DataSignpostingGuide.pdf)

What evidence/information (both qualitative and quantitative) have you gathered to inform this policy? Specify details for each of the Section 75 categories.

|  |  |
| --- | --- |
| **Section 75 category** | **Details of evidence/information** |
| Religious belief | Concessionary Fares are not available for this Section 75 grouping.  Concessionary Fare data is only available for the Section 75 categories of Age and Disability. |
| Political opinion | Concessionary Fares are not available for this Section 75 grouping.  Concessionary Fare data is only available for the Section 75 categories of Age and Disability. |
| Racial group | Concessionary Fares are not available for this Section 75 grouping.  Concessionary Fare data is only available for the Section 75 categories of Age and Disability. |
| Age | At June 2024, 369,478 SmartPasses were held by older people. Comparing this to the 2021 census of those persons aged 60 and over (439,526 persons), there was an approximately 84% uptake of these SmartPasses. In a normal year, older people make up approximately 20% of Metro passengers, 16% of NIR passengers and 13% of Ulsterbus passengers which equates to an overall 16% of Translink’s normal 84m annual passenger journeys. This evidence is based on the journeys taken by people over 60 years old who hold concessionary fare passes. This overall percentage is representative of the percentage of older people in Northern Ireland which is almost 17% of the population here based on NISRA population statistics. |
| Marital status | Concessionary Fares are not available for this Section 75 grouping.  Concessionary Fare data is only available for the Section 75 categories of Age and Disability. |
| Sexual orientation | Concessionary Fares are not available for this Section 75 grouping.  Concessionary Fare data is only available for the Section 75 categories of Age and Disability. |
| Men and women generally | Concessionary Fares are not available for this Section 75 grouping.  Concessionary Fare data is only available for the Section 75 categories of Age and Disability. |
| Disability | The NI Census 2011 indicated that just over one in five of the usually resident population (21%) had a long-term health problem. Transport Accessibility Statistics Northern Ireland 2021 indicated that people 16+ with mobility issues used public transport for 4% of their journeys compared to 2% of people 16+ without mobility issues. The Department supports people with disabilities using public transport through the Concessionary Fare Scheme which provides the majority of people with a disability half-fare travel. It is worth noting that this only applies to those people aged 16-59. People with a disability aged 60+ can avail of free travel under the Scheme. |
| Dependants | Concessionary Fares are not available for this Section 75 grouping.  Concessionary Fare data is only available for the Section 75 categories of Age and Disability. |

**Needs, Experiences and Priorities**

Taking into account the information referred to above, what are the different needs, experiences and priorities of each of the following categories, in relation to the particular policy/decision?

Specify details for each of the Section 75 categories

|  |  |
| --- | --- |
| **Section 75 category** | **Details of needs/experiences/priorities** |
| Religious belief | The online booking system will be used by those of different religious belief however no specific need has been identified for this group |
| Political opinion | As above |
| Racial group | As above |
| Age | Older people require a service level to meet their normal daily needs which may include access to shops, friends and community facilities as well access to health and care services. This group can avail of free travel and travel under the Concessionary Fares Scheme in Northern Ireland. |
| Marital status | As outlined above in Religious Belief |
| Sexual orientation | As outlined above in Religious Belief |
| Men and women generally | As outlined above in Religious Belief |
| Disability | People with specific accessibility needs may also have needs in respect of the online booking fee for Cross-Border services in relation to this policy. For those passengers who do not qualify for an age-related SmartPass, depending on the nature of the individual’s disability they may qualify for a Half Fare or Concessionary pass, which is provided by the Department for Infrastructure. |
| Dependants | As outlined above in Religious Belief |

**PART 2 - SCREENING QUESTIONS**

**Introduction**

In making a decision as to whether or not there is a need to carry out an equality impact assessment, the public authority should consider its answers to the questions 1-4 which are given on pages 66-68 of the Guide: [Guide for Public Authorities April 2010](https://www.equalityni.org/ECNI/media/ECNI/Publications/Employers%20and%20Service%20Providers/S75GuideforPublicAuthoritiesApril2010.pdf)

Taking into account the evidence presented above, consider and comment on the likely impact on equality of opportunity and good relations for those affected by this policy, in any way, for each of the equality and good relations categories, by applying the screening questions given overleaf and indicate the level of impact on the group i.e. minor, major or none.

**Impact: Major / Minor / None**

If the public authority’s conclusion is **major** in respect of one or more of the Section 75 equality of opportunity and/or good relations categories, then consideration should be given to subjecting the policy to the equality impact assessment procedure.

**In favour of ‘MAJOR’ impact**

|  |  |
| --- | --- |
| **A** | The policy is significant in terms of its strategic importance; |
| **B** | Potential equality impacts are unknown, because, for example, there is insufficient data upon which to make an assessment or because they are complex, and it would be appropriate to conduct an equality impact assessment in order to better assess them; |
| **C** | Potential equality and/or good relations impacts are likely to be adverse or are likely to be experienced disproportionately by groups of people including those who are marginalised or disadvantaged; |
| **D** | Further assessment offers a valuable way to examine the evidence and develop recommendations in respect of a policy about which there are concerns amongst affected individuals and representative groups, for example in respect of multiple identities; |
| **E** | The policy is likely to be challenged by way of judicial review; |
| **F** | The policy is significant in terms of expenditure. |

If the public authority’s conclusion is **minor** in respect of one or more of the Section 75 equality categories and/or good relations categories, then consideration should still be given to proceeding with an equality impact assessment, or to:

* Measures to mitigate the adverse impact; or
* The introduction of an alternative policy to better promote equality of opportunity and/or good relations.

**In favour of ‘MINOR’ impact**

|  |  |
| --- | --- |
| **A** | The policy is not unlawfully discriminatory and any residual potential impacts on people are judged to be negligible; |
| **B** | The policy, or certain proposals within it, are potentially unlawfully discriminatory, but this possibility can readily and easily be eliminated by making appropriate changes to the policy or by adopting appropriate mitigating measures; |
| **C** | Any asymmetrical equality impacts caused by the policy are intentional because they are specifically designed to promote equality of opportunity for particular groups of disadvantaged people; |
| **D** | By amending the policy there are better opportunities to better promote equality of opportunity and/or good relations. |

If the public authority’s conclusion is **none** in respect of all of the Section 75 equality of opportunity and/or good relations categories, then the public authority may decide to screen the policy out. If a policy is ‘screened out’ as having no relevance to equality of opportunity or good relations, a public authority should give details of the reasons for the decision taken.

**In favour of ‘NONE’**

|  |  |
| --- | --- |
| **A** | The policy has no relevance to equality of opportunity or good relations. |
| **B** | The policy is purely technical in nature and will have no bearing in terms of its likely impact on equality of opportunity or good relations for people within the equality and good relations categories. |

**Screening Questions 1 - 4**

|  |  |  |
| --- | --- | --- |
| **Screening Question 1** | | |
| 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 | | |
| Section 75 category | Details of policy impact | Level of impact? Minor/Major/None |
| Religious belief | The online booking system will be used by those of different religious belief however no specific need has been identified for this group. Introducing a booking fee for concessionary fare holders will help ensure only those with a genuine intention of travelling secure a seat.  This will help all passengers avail of seats that were previously block booked and unused. | None |
| Political opinion | As above | None |
| Racial group | As above | None |
| Age | Based on the evidence above, this decision would have minor impact on equality of opportunity for older people. Older people (60+) will continue to avail of free travel through the Concessionary Fares Scheme on all services, but will be required to pay a booking fee to reserve a seat online for Bus and Rail Cross-Border services only. The introduction of the booking fee will secure a booking for these concessionary fare holders at a minimal monetary value.  It will ensure those with a genuine intention of travelling on Translink services will have a greater chance of obtaining a seat. | Minor |
| Marital status | As above | None |
| Sexual orientation | As above | None |
| Men and women generally | As above | None |
| Disability | Based on the evidence above, this decision would have minor impact on equality of opportunity for people with a disability. Older people with a disability who are more than 60 years old will continue to avail of free travel through the Concessionary Fares Scheme on all services, but will be required to pay a booking fee to reserve a seat online for Bus and Rail Cross-Border services only. The introduction of the booking fee will secure a booking for these concessionary fare holders at a minimal monetary value.  It will ensure those with a genuine intention of travelling on Translink services will have a greater chance of obtaining a seat. | Minor |
| Dependants | The online booking system will be used by Dependents however no specific need has been identified for this group. | None |

|  |  |  |
| --- | --- | --- |
| **Screening Question** **2** | | |
| Are there opportunities to better promote equality of opportunity for people within the Section 75 equalities categories? | | |
| Section 75 category | If **Yes**, provide details | If **No**, provide reasons |
| Religious belief |  | No - Translink deliver an agreed service network covering all of Northern Ireland. As such, it already promotes equality of opportunity across this S75 group and there are no further promotion opportunities. There is no evidence to suggest that persons of one particular religious belief will be impacted by this policy change more than another |
| Political opinion |  | No – as above |
| Racial group |  | No – as above |
| Age |  | No – as above. |
| Marital status |  | No – as above |
| Sexual orientation |  | No – as above |
| Men and women generally |  | No – as above |
| Disability |  | No. However, Translink deliver an agreed service network covering all of Northern Ireland, using buses and trains equipped to accessibility requirements. As such, it promotes equality of opportunity across this S75 group by way of financial assistance for people with disabilities through the Concessionary Fares Scheme. Translink also works closely with key stakeholders such as the Inclusive Mobility for Transport Advisory Committee (IMTAC) to improve and enhance the accessibility of all services. |
| Dependants |  | No – as above |

|  |  |  |
| --- | --- | --- |
| **Screening Question** **3** | | |
| To what extent is the policy likely to impact on good relations between people of different religious belief, political opinion or racial group? Minor/ Major/ None | | |
| Good relations category | Details of policy impact | Level of impact Minor/Major/None |
| Religious belief | The online booking system will be used by those of different religious belief and it is not believed that this policy will impact this group | None |
| Political opinion | As above | None |
| Racial group | As above | None |

|  |  |  |
| --- | --- | --- |
| **Screening Question 4** | | |
| Are there opportunities to better promote good relations between people of different religious belief, political opinion or racial group? | | |
| Good relations category | If **Yes**, provide details | If **No**, provide reasons |
| Religious belief |  | No – this policy does not provide the opportunity to better promote good relations. |
| Political opinion |  | No – this policy does not provide the opportunity to better promote good relations. |
| Racial group |  | No – this policy does not provide the opportunity to better promote good relations. |

**Additional Considerations**

**Multiple Identity**

Generally speaking, people can fall into more than one Section 75 category. Taking this into consideration, are there any potential impacts of the policy/decision on people with multiple identities?  (For example: disabled minority ethnic people; disabled women; young Protestant men; and young lesbians, gay and bisexual people).

|  |
| --- |
| None |

Provide details of data on the impact of the policy on people with multiple identities. Specify relevant Section 75 categories concerned.

|  |
| --- |
| N/A |

**PART 3 - SCREENING DECISION**

If the decision is **not** to conduct an **equality impact assessment**, please provide details of the reasons.

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| --- |
| Any impacts on the groups have been identified as minor, so it is not believed necessary to conduct an equality impact assessment. |

If the decision is not to conduct an equality impact assessment the public authority should consider if the policy should be **mitigated or an alternative policy be introduced**.

|  |
| --- |
| A range of alternative options were considered as part of this review including implementing a telephone booking system or applying a penalty only to those who have made block bookings. However these were deemed not feasible for the business due to a number of technical and financial reasons.  In addition, we have consulted a number of internal stakeholders including Bus and Rail Operations, Finance and Ticketing to explore options as well as benchmark with other providers who operate similar concessionary schemes.  At present we’ve been unable to identify a suitable alternative way to solve the issue.  The booking fee has been chosen at a small value, so that the financial impact on concessionary fare holders is minimised. However, it should still act as a deterrent for block bookings that then aren’t fulfilled, to allow all passengers to avail of services. |

If the decision **is to** subject the policy to an **equality impact assessment**, please provide details of the reasons.

|  |
| --- |
| N/A |

All public authorities’ equality schemes must state the authority’s arrangements for assessing and consulting on the likely impact of policies adopted or proposed to be adopted by the authority on the promotion of equality of opportunity. The Commission recommends screening and equality impact assessment as the tools to be utilised for such assessments. Further advice on equality impact assessment may be found in a separate Commission publication: Practical Guidance on Equality Impact Assessment.

**Mitigation**

When the public authority concludes that the likely impact is ‘minor’ and an equality impact assessment is not to be conducted, the public authority may consider mitigation to lessen the severity of any equality impact, or the introduction of an alternative policy to better promote equality of opportunity or good relations.

Can the policy/decision be amended or changed or an alternative policy introduced to better promote equality of opportunity and/or good relations?

If so, give the **reasons** to support your decision, together with the proposed changes/amendments or alternative policy.

|  |
| --- |
| The proposed option is to implement a booking fee for Concession pass holders via a Semi-Flexible option. This would allow customers to make changes to the date/time of their original booking but they would not be able to apply for a refund of the booking fee. |

**Timetabling and Prioritising**

Factors to be considered in timetabling and prioritising policies for equality impact assessment.

If the policy has been **‘screened in’** for equality impact assessment, then please answer the following questions to determine its priority for timetabling the equality impact assessment.

On a scale of 1-3, with 1 being the lowest priority and 3 being the highest, assess the policy in terms of its priority for equality impact assessment.

|  |  |
| --- | --- |
| **Priority Criterion** | **Rating (1-3)** |
| Effect on equality of opportunity and good relations | Choose an item. |
| Social need | Choose an item. |
| Effect on people’s daily lives | Choose an item. |
| Relevance to a public authority’s functions | Choose an item. |

Note: The Total Rating Score should be used to prioritise the policy in rank order with other policies screened in for equality impact assessment. This list of priorities will assist the public authority in timetabling. Details of the Public Authority’s Equality Impact Assessment Timetable should be included in the quarterly Screening Report.

Is the policy affected by timetables established by other relevant public authorities?

If yes, please provide details:

|  |
| --- |
|  |

**PART 4 - MONITORING**

Public authorities should consider the guidance contained in the Commission’s Monitoring Guidance for Use by Public Authorities (July 2007).

The Commission recommends that where the policy has been amended or an alternative policy introduced, the public authority should monitor more broadly than for adverse impact (See Benefits, P.9-10, paras 2.13 – 2.20 of the Monitoring Guidance).

Effective monitoring will help the public authority identify any future adverse impact arising from the policy which may lead the public authority to conduct an equality impact assessment, as well as help with future planning and policy development.

|  |
| --- |
| *It is anticipated that the impact of this change will be reviewed initially after a period of 6 months and an equality screening can be revisited.* |

**PART 5 - APPROVAL AND AUTHORISATION**

|  |  |  |  |
| --- | --- | --- | --- |
| **Policy Title:** | **Online Booking Fee for Concession Pass Holders** | **Version No:** |  |
| **Print Name: MO MCCAULEY** | **Position/Job Title: Social & eCommerce Manager** | **Signature** | **Date 07/11/2024** |
| **Screened By:** | | | |
|  |  |  |  |
| **Approved by:** | | | |
| **DAVID COWAN** | **Director of Commercial Operations** |  | 07/11/2024 |

Note: A copy of the Screening Template, for each policy screened should be ‘signed off’ and approved by a senior manager responsible for the policy, made easily accessible on the public authority’s website as soon as possible following completion and made available on request.

**APPENDIX 1**

|  |  |  |
| --- | --- | --- |
| **Part** | **Part Title** | **Description** |
| **1** | [**Policy Scoping**](#Part1) | Asks public authorities to provide details about the policy, procedure, practice and/or decision being screened and what available evidence you have gathered to help make an assessment of the likely impact on equality of opportunity and good relations |
| **2** | [**Screening Questions**](#Part2) | Asks about the extent of the likely impact of the policy on groups of people within each of the Section 75 categories. Details of the groups consulted and the level of assessment of the likely impact. This includes consideration of multiple identity and good relations issues. |
| **3** | [**Screening Decision**](#Part3) | Guides the public authority to reach a screening decision as to whether or not there is a need to carry out an equality impact assessment (EQIA), or tointroducemeasures to mitigate the likely impact, or the introduction of an alternative policy to better promote equality of opportunity and/or good relations. |
| **4** | [**Monitoring**](#Part4) | Provides guidance to public authorities on monitoring for adverse impact and broader monitoring. |
| **5** | [**Approval and Authorisation**](#Part5) | Verifies the public authority’s approval of a screening decision by a senior manager responsible for the policy. |

Policy Scoping

* Policy
* Available data

Screening Questions

* Apply screening questions
* Consider multiple identities

Screening Decision None/Minor/Major

Mitigate

Publish Template

Re-consider screening

Publish Template for information

Publish Template

EQIA

Monitor

**‘None’**

Screened out

**‘Major’**

Screened in for EQIA

**‘Minor’**

Screened out with mitigation

Concerns raised with evidence

Concerns raised with evidence re: screening decision