# Business Services Organisation

# Five Year Review of Equality Scheme

**June 2021**

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# 1. Introduction

Like all public bodies, the Business Services Organisation (BSO) have committed to reviewing its Equality Scheme under Section 75 of the Northern Ireland Act (1998) every five years. The purpose of the review is to take learning and set direction for the coming years by critically evaluating the way the organisation has implemented Section 75 over the past five years.

The review is a process of self-assessment. As specified by Equality Commission guidance[1], the review involves looking at what has been achieved, what remains to be done, and lessons learned. It should be based on evidence. The guidance states that the collection and consideration of additional quantitative and qualitative data may be necessary, alongside use of existing information from previous Annual Progress Reports on the implementation of Section 75.

This report presents the key findings from the review against five themes of Equality Scheme implementation:

1. Outcomes
2. Business planning, policy- and decision-making, and governance arrangements
3. Equality monitoring, engagement with Section 75 groupings, and access to information and services
4. Ensuring BSO staff assist the organisation in implementing Section 75
5. Leadership.

The key questions guiding the review are outlined at the start of each theme discussion. Background information on the organisation and the review methodology is included in the opening section. The final chapter presents conclusions in the form of lessons learned and key commitments going forward. The scope and structure of the concluding section is moreover designed to cover the Equality Commission's requirements in relation to a summary of the main findings of the review.

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[1] Equality Commission for Northern Ireland (2016): Guidance on conducting a 5 year review of an equality scheme.

## 2. Background

**The organisation**

The Business Services Organisation (BSO) was established on 1 April 2009 to provide a wide range of business and specialist professional services to the wider Health and Social Care (HSC) environment. The BSO comprises over 20 service areas under the following Directorates/entities:

- Legal Services
- Operations (HSC Pensions; Procurement and Logistics Service; Family Practitioner Services; Counter Fraud and Probity Services; Small Business Research Initiative)
- Shared Services (Accounts Payable; Accounts Receivable; Payroll Service Centre; Business Support Team; Recruitment Shared Service; NI HSC Interpreting Service)
- Clinical Education Centre
- Leadership Centre
- Encompass
- Customer Care and Performance (Customer Relations and Service Improvement; IT Services; Office for Research Ethics Committees; Honest Broker Service; Equality and Human Rights)
- Finance (Finance; Internal Audit)
- Human Resources and Corporate Services.

Further information on each of the service areas is provided by the BSO Service Catalogue: https://hscbusiness.hscni.net/about/2585.htm

The BSO currently employs just over 1550 members of staff. The BSO works closely with the other 10 regional HSC organisations on equality matters through partnership arrangements, led by the BSO Equality Unit.

**Methodology of the review**

The review involved the collection of both quantitative and qualitative data. Firstly, in-house data was collected, such as information on training and equality screenings. The BSO Annual Progress Reports 2016-17 to 2019-20 as well as quarterly screenings reports for 2020-21

were key sources of data. For a sample of BSO board meetings, agenda items were reviewed alongside the information in the screening reports.

Secondly, a series of conversations informed the review. Focus groups were conducted by the BSO Equality Unit with:

- a self-selected group of volunteers of BSO board members (Non-Executive Directors)
- members of the BSO Senior Management Team
- the senior team within the Directorate of Human Resources
- BSO Equality Forum members
- Tapestry, the staff disability network of the 11 regional HSC organisations.

## 3. Key Findings

### 3.1    Outcomes

- What difference have we made for staff in the nine equality categories over the past five years? Whose needs have we focused on? Where are the gaps?
- What outcomes have we produced for service users?

**Staff**

Over the past five years, the BSO has made significant progress in identifying and seeking to address the needs of staff and candidates with a disability.

Staff awareness days have proven to be effective in increasing awareness, knowledge and skills of staff and line managers in meeting the needs of colleagues with particular disabilities. On the day, speakers from voluntary sector organisations deliver short inputs and engage with participants through questions and answers. The interactive, open, and inclusive nature of the sessions, rooted in the lived experience of individuals, has played a key role. The sessions are accompanied by concise bespoke information materials and signposting to support services.

Themes are selected based on a dedicated survey with BSO staff as well as input from members of Tapestry, the staff disability network. On several occasions, topics were also advertised in Business Matters, the BSO staff newsletter, in advance inviting staff to make contact with the Equality Unit if they wished to be involved. However, this has not been the case for all awareness days. During the review period, the BSO held 10 Disability Awareness Days, each focusing on one particular condition.

Together with the Health and Social Care Board, the BSO facilitates a Work Placement Scheme across the 11 regional HSC organisations for people with a disability. Since its inception in 2014-15,

- 45 people completed a 26-week placement in the BSO and its partner organisations

- 38% of those who have completed the scheme are now in paid employment, the majority of which within the regional HSC organisations.

As evidenced through self-reporting by participants as well as placement managers and employment support officers as the key stakeholders of the scheme, outcomes extend beyond employment and employability to increased confidence levels, a reduction in social isolation and improved mental health of participants. In turn, participating teams and line managers have gained invaluable knowledge and skills in identifying and meeting the needs of people with a disability in the workplace.

Tapestry, the disability network for staff working in the BSO and the other regional HSC organisations, has provided a platform to staff with a disability to raise and discuss disability issues in a safe environment. In turn this has helped to create a more open culture around disability.

With regards to reasonable adjustments within their work, most Tapestry members who took place in the focus group felt that they are well supported. However, they also made the point that more support should have been put in place in the initial stages of employment to avoid lengthy periods of trial and error.

In comparison, there is little evidence on outcomes produced for BSO staff regarding equality categories beyond disability.

Some outcomes for staff identifying as transgender or non-binary have been achieved with the development of the Gender Identity and Expression Employment Policy. In the first place, it has increased the visibility of the range of gender identities and put in place provisions for supporting staff who transition.

Whilst this has served to lay an important foundation, staff guidance, training and awareness raising initiatives are essential as a next step to progress on meeting the needs of staff across all gender identities.

Likewise, initial work was undertaken before the pandemic to support staff who are carers of elderly dependants or a person with a disability. In the main, this was limited to raising awareness of the support in place

in the organisation (such as work-life-balance policies) and signposting to support services for carers outside the organisation.

The response to the Covid pandemic has brought significant benefits for people with dependents in terms of greater flexibility in managing caring and working responsibilities during the working day. This has been evidenced in recent surveys with staff on working from home.

Further work is required to explore the experience of BSO staff who are carers of balancing their work and caring responsibilities to ascertain to what extent current support meets their needs and what additional support may need to be put in place.

In relation to sexual orientation, whilst some staff discern a change in culture across the HSC to some extent as well as a greater visibility of lesbian, gay or bisexual staff, specific examples of measures taken by the BSO itself over the past five years are less common. The latter are largely limited to advertising the joint HSC staff forum on sexual orientation and gender identity, the display of posters in the workplace as well as Pride events.

The recently established 25 year service award serves to recognise older staff. The Partial Retirement Policy, developed during the review period, likewise produces positive outcomes for older staff.

It is intended that the development of a menopause policy and a domestic violence policy will address particular needs of women (whilst recognising that the latter affect people of any gender and gender identity).

Groups of staff whose needs remain largely unmet and unidentified include ethnic minorities. Given the relatively small numbers in the BSO there are clear opportunities for the BSO linking in with regional work in this respect.

**Outcomes for BSO service users**

Information drawn from the Annual Progress Reports suggests that, in relation to work conducted by individual service areas, different types of outcomes can be identified:

(1) facilitating improvements in access to HSC services:

- Family Practitioner Services – preparations for the registration of Syrian families arriving in Northern Ireland under the Vulnerable Person Resettlement programme

- Information Technology Services (ITS) – enabling other HSC service providers to improve transgender individuals' access to specific clinical services under their affirmed gender identity

- Procurement and Logistics Service – provision of Community Equipment and Continence Service to patients and clients in the Western and Southern Trust areas direct to their homes, many of whom are elderly or have a disability

- ITS – working with the Public Health Agency on a Patient Portal for Patients with Dementia

- Regional Interpreting Service – registration of new interpreters to meet increasing service demand for particular languages such as Arabic

(2) supporting the development of new tailored services:

- support by the Small Business Research Initiative for GEMS (Empowering Mothers through Mobile Technologies) project which aims to improve the health of pregnant women with gestational Type 1 and Type 2 diabetes.

(3) improving the availability of equality data:

- requirements relating to the collection of equality monitoring data for all nine equality groupings and for auditing were included in the tender specification for recruitment agencies, facilitated by PaLS.

A further important area shows the BSO using its influence to encourage others to promote equality as can be seen in the work of the Procurement and Logistics Service (PaLS) in relation to 'reserved' contracts. These are contracts that only organisations whose main aim

is to integrate people with a disability or disadvantaged people can bid for.

## 3.2 Business planning, policy- and decision-making, and governance arrangements

**Planning**

- <mark>How does equality feature in business plans and business planning processes?</mark>

The current BSO Corporate Plan (2018-21) includes a corporate commitment to promoting equality and addressing inequality, aligned to the organisation's values. It does not, however, detail any objectives linked to specific outcomes for any of the nine equality groupings.

Over the review year period, the annual BSO Business Plans have featured objectives relating to the category of disability. These have referred to

- the development of Interpreting Service provision to the Deaf and Hard of Hearing Community in line with Health and Social Care Board (HSCB) policies and direction as the Commissioner of the service and
- the delivery of a Disability Work Placement Scheme facilitated jointly by the BSO and HSCB on behalf of the regional HSC organisations.

Corporate templates that support the development of business plans by individual service areas include a reminder to Heads of Service to consider, as part of the business planning process, any areas which may need to be equality screened during the coming year. To date, service areas have not been required to report on the outcome of these considerations at planning stage.

Thus, to date the organisation has not developed any annual equality screening programmes as a minimum set of screening activities to be undertaken during the year.

Part of the statutory requirements around equality screening is the consideration not only of mitigating actions to address differential negative impacts but also of alternative policies/decisions that serve to better promote equality. This draws particular attention to the step in decision-making which comprises the appraisal of options. Thus, undertaking equality screenings at the point of business case writing is essential. It follows that equality screenings need to have been completed when business cases are considered for approval.

The review shows that equality requirements are not articulated in the BSO business case template nor the business case processes. BSO templates reflect those issued by the Department of Health.

In sum, the equality requirements are not currently integrated and documented in all BSO business planning processes.

**Policy- and Decision-Making**

- How many policies/decisions did we equality screen? How many did we not screen?
- What do we screen? What do we not screen?

In total, 43 policies were equality screened during the review period (see Appendix).

It becomes clear that the majority of these were of a corporate nature and of those, many were technical policies that do not directly impact on people (such as the Risk Management Strategy).

In order to ascertain whether all policies and decisions were equality screened during the review period, a sample of agendas and minutes of BSO Board meetings were reviewed to identify items in need of equality screening on the one hand and the information in quarterly BSO screening reports as to screenings published on the other. The review of BSO Board agenda items during 2019-20 against published equality screenings shows that no evidence of equality screening was available for five out of nine policies and none for either of two major decisions. In

turn, these comprised key policies and decisions[2] with clear equality implications.

The review of practices also revealed that, at times, equality screening is undertaken only after a policy or decision has been approved.

At the same time, the information shows an increase in the share of screenings relating to service provision/BSO functions during 2020-21, a trend led by the Clinical Education Centre and ITS in particular. This is corroborated by data on advice sought from the Equality Unit on individual equality screening exercises indicating that further pieces of work are in the course of being screened.

- What governance measures are in place for ensuring that screening is carried out?
- Are completed screenings (the data, its analysis and conclusions) brought to the attention of decision-makers prior to decision-making?
- How do decision-makers satisfy themselves that equality screening has been carried out appropriately when policies and decisions are brought to them (whether for noting or approval)?

Papers presented to BSO SMT and BSO Board are normally accompanied by a cover note. To date, the respective leads have not been required to provide any explicit assurance that an equality screening (and, where relevant, an EQIA) has been completed and that evidence thereof has been finalised in the form of a completed screening template (or EQIA report) when a paper is submitted for consideration by SMT or Board. Neither are manual checks undertaken that the requisite evidence has been produced and is publicly available. SMT and Board members moreover do not routinely receive any information on equality issues identified and how these have been addressed in the policy or decision.

In the absence of this, SMT and Board members deem policies to have been screened before they come to SMT and Board for noting or

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[2] Including, for example, Conflict, Bullying and Harassment Policy; Grievance and Capability Policies; Complaints Policy; and business cases for Encompass and the Replacement for the main Human Resources IT system.

approval. At times, individual members ask the question at SMT and Board meetings whether an item has been equality screened or raise a particular equality issue. Some individual Directors also report having asked for an assurance by the lead within their Directorate before they take a paper to SMT more recently.

The review suggests that at the point of decision-making, SMT and Board members do not have either evidence that the equality issues have been considered appropriately or an assurance thereof.

A list of published equality screenings forms part of the Annual Progress Report to the Equality Commission for any given year, which is reviewed and approved by both SMT and Board before submission. Conclusions drawn as to progress on mainstreaming of equality screening in BSO decision-making are brought to the attention of SMT and Board as part of the Annual Progress Report. In addition, compliance issues are highlighted in specific SMT papers where relevant during the year.

Directors and Assistant Directors/Heads of Service receive and quality-assure equality screening reports on a quarterly basis, capturing all equality screenings published during the previous quarter. New service-related developments and associated equality screening activities are a standing agenda item on quarterly meetings of the BSO Equality Forum whose membership comprises all BSO service areas. All attendees are required to provide updates under this agenda item.

In practice, this has proved a valuable reporting mechanism and serves to prompt service areas regularly throughout the year on the need to undertake equality screenings. However, its effectiveness is limited as non- or intermittent attendance by some service areas means that some teams do not provide any regular reports.

Good practice is evident in some service areas with regards to ongoing monitoring of screening activity, such as the Clinical Education Centre, where staff are required to report back to management on progress with screening activity at team meetings.

Internal BSO audits that involve a check of policies include scrutiny of the availability of published equality screening templates alongside the policy document.

### 3.3 Equality Monitoring, Engagement with Section 75 groupings, and Access to Information and Services

- What equality data do we collect and how do we use the monitoring data?
- How do we engage with individuals in the nine equality categories and with voluntary sector organisations that represent their interests and lived experiences?
- How accessible is the information we produce?

**Staff equality monitoring**

Equality monitoring for BSO staff is carried out by self-completion on our Human Resources IT system in relation to all nine equality categories. Summary equality data for the organisation as a whole is downloaded and reviewed quarterly. The most up to date data is shared with staff conducting equality screenings.

Prompts to encourage staff to do so are sent to all BSO staff regularly. In addition, the benefits for both staff and the organisation of good quality equality data are highlighted at relevant staff events, such as our Disability Awareness Days.

Despite these efforts, completion rates have not improved for the categories of dependents, sexual orientation, political opinion, ethnicity and disability in particular. Non-completion levels for the above remain at 70-80% (50% for disability). More robust staff data is necessary to inform the equality screening of relevant policies and decisions.

The collection and analysis of qualitative monitoring data on the Disability Work Placement Scheme has been mainstreamed. A series of focus groups is conducted every year with participants and key stakeholders.

There is no evidence that equality monitoring is routinely undertaken and used in the development and review of policies relating to staff, such as

the analysis of the full equality profile of candidates shortlisted for interview and those appointed.

**BSO functions and equality monitoring**

With regards to BSO functions, some progress has been made on the collection and use of equality monitoring data in specific service areas. Thus, for instance, the Office for Research Ethics Committees Northern Ireland (ORECNI) now captures equality monitoring data for Research Ethics Committees to ascertain the diversity of their members. Likewise, for adult acute programmes delivered by the Clinical Education Centre applicants are asked to fill in a short questionnaire to gather Section 75 equality information.

During the review period, the Procurement and Logistics Service has increasingly used its influence in relation to contracts with recruitment agencies in order to improve equality monitoring for agency workers placed with HSC organisations. This included an exercise requesting and analysing equality data from agencies for workers under a selection of services contracted (such as admin and clerical functions).

This has allowed for the first time monitoring the diversity of agency workers placed within HSC organisations. In turn, this will enable informed engagement with recruitment agencies in future on measures to address any under-representation and improve the user experience of specific equality groupings where required.

BSO IT Services are uniquely placed within the HSC system to use their influence with other HSC organisations at a strategic level and to support HSC organisations in improving equality monitoring.

**Engagement**

On equality issues relating to staff, some engagement is undertaken by HR with voluntary sector organisations such as Action Mental Health and the Royal National Institute for the Deaf. This is confined to the category of disability and is largely reactive, relating to individual cases. In the main, the organisation has largely relied on trade unions in relation to raising equality issues and understanding the needs of groups of staff.

There is no evidence of any proactive efforts having been taken and the strategic development of links and working relationships with groups representing the interests and lived experience of Section 75 groups.

To date, existing staff fora such as Tapestry and the HSC forum on sexual orientation and gender identity have not been approached as a matter of course in the development and review of Human Resources policies or in decision-making.

In relation to BSO functions, engagement with voluntary sector organisations and individuals from Section 75 groups is limited to a small number of service areas and specific programmes of work therein, such as Shared Services Interpreting Service, the Access to Healthcare team, the Clinical Education Centre, OREC or ITS. In parts, this is driven by the specific nature of the work, in other parts by the commitment of the respective lead (as in the case of work on Transgender Patient Management Records by ITS).

**Access to Information and Services**

The BSO has developed and adopted an Accessible Formats Policy. Whilst this is a key asset for improving access to written information produced by the BSO, the focus group with Tapestry members unearthed persisting gaps in its application. Accessibility issues were also identified in relation to recruitment and selection processes and training.

Staff with sensory loss and those with a learning disability report experiencing significant barriers resulting from a lack of accessibility of information provided. Policies and procedures, induction materials, the systems used (such as HRPTS and eProcurement) and general information shared with all staff was not accessible to them. This applies to information relating to the recruitment and selection process (including pre-employment checks) and once staff with a disability are in post. Likewise, mainstream training is largely inaccessible for them, both as to training course materials, e-learning, and a lack of trainers' understanding of the specific information and communication needs of staff with a disability.

Barriers posed by a lack of accessibility and accessible information extend to outward-facing services and corporate functions, such as complaints.

## 3.4   Ensuring BSO staff assist the organisation in implementing Section 75

- How do we bind our staff into their role in implementing Section 75?
- How do we equip our staff to be able to do so effectively?

**Job Descriptions**

With the exception of Equality Unit staff, BSO job descriptions do not make any reference to Section 75 nor to the role of all staff in implementing the statutory equality duties.[3] Moreover, job descriptions for posts that include responsibilities for policy and decision-making do not incorporate any reference to equality screenings or Equality Impact Assessments. Thus, staff are not explicitly bound into their role to assist the organisation in fulfilling its statutory equality duties through their job description.

**Training**

A suite of training has been made available to staff and covers both equality awareness and specific skills in Section 75 implementation, including equality screening and EQIA.

During 2016-17, the BSO Equality Unit – jointly with colleagues in the HSC Trusts – developed a bespoke eLearning package on equality awareness called 'Making a Difference'.[4] The aim of the resource is to show how staff can make a difference to the culture of their organisation by:

- Promoting positive attitudes to diversity

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[3] Whilst job descriptions mention the BSO policy on Equality of Opportunity, this bears no relevance to Section 75 as the scope of this policy is limited to the BSO's obligations under anti-discrimination legislation and does not cover the specific positive duties under Section 75. Moreover, the scope of the policy is restricted to the employment sphere and does not cover the provision of BSO functions and associated activities, such as procurement for example.

[4] Prior to the introduction of Making a Difference, staff were required to undertake the Discovering Diversity eLearning, again a bespoke package, developed in-house.

- Ensuring everyone is treated with respect and dignity
- Behaving in a way that is in keeping with HSC values and equality and human rights law.

Subsequently, completion of 'Making a Difference' was made mandatory for all staff (with a refresher every two years). To date, 738 staff have completed the programme.

Corporate Induction is mandatory for all new staff. It covers the Section 75 duties and includes interactive exercises on the needs of people in the equality categories. Up to the onset of the pandemic, it was delivered face-to-face. A total of 537 staff participated in the training during the review period.

In reality, not all new staff attend Corporate Induction and producing reports on those who did not attend is currently not possible on the basis of the current HR IT systems.

Equality screening and EQIA training is mandatory for relevant staff in the BSO, defined as those involved in policy- and decision-making. Directors, Assistant Directors and Heads of Service respectively are responsible for identifying staff in need of training. During the review period, 40 members of staff attended Equality Screening training and 14 staff participated in training on Equality Impact Assessments.

Training records for senior staff show that 11 out of 40 members of staff at Director and Assistant Director/Head of Service level had attended training on equality screening and four staff had undertaken EQIA training.

Records moreover provide evidence that some staff who carry out equality screenings have not completed the requisite training.

One BSO service area, the Community Equipment and Continence Service (part of the Procurement and Logistics Service), was particularly proactive in developing the knowledge and skills of their staff in relation to people with a disability. Rooted in a customer care approach, the team's manager arranged a programme of sessions on dementia, deafness & hearing loss, as well as blindness and sight loss, delivered by voluntary sector organisations.

Tapestry members identified the need to roll out training on the needs of people with a disability across all BSO service areas.

## 3.5 Leadership

- What equality infrastructure is in place? Is it effective?
- Who leads on equality?
- What role do senior leaders perform in Section 75 implementation?
- What does leadership look like?

The BSO Director of Customer Care and Performance is the nominated equality lead. The BSO Equality Unit provides support and advice to the organisation and service areas on Section 75 implementation. The Unit also delivers equality services to the other 10 regional HSC organisations through a partnership arrangement.

The location of Section 75 responsibilities and services within the Customer Care and Performance Directorate has allowed counteracting any perceptions of equality issues being limited to the employment sphere. It likewise presents an opportunity to closely align the equality mainstreaming agenda with planning, performance, service improvement, governance, and customer care agendas – and to define equality issues as quality issues.

The BSO Equality Forum meets quarterly and brings together representatives from all BSO service areas. In effect, membership varies from Assistant Director level in some to middle management level in other service areas. The Forum serves as an important vehicle to progress the mainstreaming of equality across the organisation – through briefings, information sharing, reporting and discussion. Members tend to be individuals who are deeply committed to the equality agenda and highly motivated to lead on or contribute to progress.

To date, there has been no direct interaction between the Equality Forum and SMT or BSO Board. Not all Directorates/service areas have established regular internal reporting on equality matters discussed at the Forum. Non- or intermittent attendance by some service areas likewise remains an issue.

Whilst the Forum undoubtedly presents an asset, members also perceive a tendency for the ownership of the equality agenda to be limited to the nominated equality leads within service areas (ie. forum members) and equality professionals. In turn, they see a need to widen the ownership; to identify and clearly articulate equality messages, to emphasise the message that equality should be constantly on the agenda throughout the organisation and to building this into governance arrangements. Equality issues are seen to tend to fall off the agenda if not constantly revisited from the top down.

SMT members are involved in Section 75 implementation in a number of ways, such as

- Annual progress reporting: scrutiny of progress and direction setting for the coming year;
- Discussion and where required taking action on Equality Scheme issues brought to SMT throughout the year by the Director of Customer Care and Performance and the Equality Unit.

Assistant Directors/Heads of Service play an important leadership role by:

- Contributing to annual progress reporting through identifying relevant initiatives in their area of responsibility
- Quarterly equality screening reporting: scrutiny of progress and quality-assuring reports.

SMT members recognise their pivotal leadership role; the need to ensure compliance, in particular with regards to equality screening, and to have the requisite in-depth understanding of what is required; the need to set an example, to make sure SMT practise what they preach and that what they do is meaningful. SMT members see scope for strengthening their leadership role by becoming more proactive; ensuring better documenting of equality matters so that equality becomes more visible; by communicating more on equality issues both internally and externally; and by demonstrating and referencing equality in the culture of the organisation and in innovations.

In the main, BSO board members provide leadership on Section 75 implementation through receiving information, providing comment and feedback in the context of annual progress reporting ie. scrutiny of progress and direction setting for the coming year on the one hand and through raising equality issues on the other.

One of the BSO Non-Executive Directors has been nominated as the BSO Disability Champion at board level. The champion has been highly effective in

- advocating for people with a disability in board and committee business
- providing scrutiny and challenge of BSO business from a disability perspective
- presenting the Annual Progress Report and other Section 75 related documents (such as the Equality Action Plan) to board and
- acting as a sponsor for relevant initiatives and visibly demonstrating the commitment to promoting disability equality at the highest level of the organisation (for example by chairing the end of scheme recognition event for participants of the Placement Scheme and speaking at the HSC-wide launch of the Making a Difference eLearning programme).

The champion has been actively supported by the BSO Chair in this role throughout the review period.

The work of the champion has been further enhanced by collaboration of champions across the 11 regional HSC organisations through the Disability Champions Network, facilitated by the Equality Unit. Champions meet three times a year to receive briefings and discuss disability matters at a strategic level.

Examples of leadership by service areas through good practice and being proactive include the PaLS Community Equipment and Continence Service and the HSC Demographics Team in ITS. In essence, this reflects leadership by individuals with a high personal motivation and commitment to equality.

Given the nature of BSO functions as supporting other HSC organisations and the resulting multitude of interfaces, external-facing opportunities to provide leadership are particularly pertinent for the BSO. Examples of the BSO using its influence on others to promote equality include:

- Procurement and Logistics Service – actively ensuring that procuring authorities undertake equality screening in relation to individual Social Care Procurement exercises; promoting the use of social clauses and reserved contracts in relevant contracts by HSC procuring authorities
- Directorate of Legal Services – including the statutory equality and disability duties and equality screening obligations in particular in training delivered to HSC decision-makers.

The BSO Equality Unit convenes a Client Equality Forum, bringing together the equality leads of the 10 client organisations. The Forum meets quarterly to receive briefings and recommendations, plan joint work and share good practice in the implementation of Section 75.

Visibly promoting and celebrating diversity constitutes a further key aspect of active leadership on Section 75 implementation. Examples of activities in this respect relate to

- the Disability Awareness Days (held twice a year), which involve the display of information stands, electronic communication with 'my story' narratives by staff, as well as speakers sharing their lived experience at live sessions.
- the Disability Placement Scheme, which includes a welcome and induction event as well as a recognition and celebration event at the end of the scheme.

It becomes clear that in the main, the visible celebration and promotion relates to the category of disability.

A further feature of actively promoting equality and diversity relates to sharing, acknowledging and rewarding good equality practice. Briefing papers to SMT and Board that accompany the Annual Progress Report highlight a small selection of good practice examples at senior level.

A prompt for service areas to share information about good practice initiatives is included as a standing item on the agenda of quarterly BSO Equality Forum meetings. In practice, there remains scope for strengthening this function of the forum.

Whilst the BSO undertook a number of recognition initiatives (such as individual and team awards and features in staff newsletters) during the review period, to date, there have not been any initiatives corporately dedicated to the specific recognition and celebration of good equality practice.

# 4. Conclusions

In the following, conclusions are presented against each of the headings presented in Equality Commission guidance on five year reviews.

**How has the scheme's implementation benefitted individuals within the Section 75 groups?**

Work conducted by individual BSO service areas has contributed to creating different types of outcomes for people within the Section 75 groups. These include

- facilitating improvements in access to HSC services
- supporting the development of new tailored services
- improving the availability of equality data.

In relation to the workplace, important outcomes have been achieved for people with a disability. These include

- facilitating individuals to gain employment and enhance their employability; increased confidence levels; a reduction in social isolation; and improved mental health
- creating a platform to raise and discuss disability issues in a safe environment; contributing to the development of a more open culture around disability.

In comparison, little evidence is available to show outcomes for staff in other equality categories or outcomes on good relations.

**How are leaders within the authority engaged in the scheme's implementation?**

BSO board members provide leadership on Section 75 implementation through comment and feedback in the context of annual progress reporting ie. scrutiny of progress and direction setting for the coming year on the one hand and through raising equality issues relating to board business throughout the year on the other. The organisation has nominated a Non-Executive Board Member to act as a Disability Champion at board level. The champion has been highly effective in advocating for people with a disability in board and committee business;

providing scrutiny and challenge of BSO business from a disability perspective; and acting as a sponsor for disability-related initiatives, thereby visibly demonstrating the commitment to promoting disability equality at the highest level of the organisation.

SMT members are involved in Section 75 implementation likewise through scrutiny of progress and direction setting for the coming year in the context of the Annual Progress Report. In addition, they discuss and where required take action on Equality Scheme issues brought to SMT throughout the year by the Director of Customer Care and Performance and the Equality Unit.

Assistant Directors/Heads of Service play an important leadership role by contributing to annual progress reporting through identifying relevant initiatives in their area of responsibility and, in the context of quarterly equality screening reports, through scrutiny of progress and quality-assuring the information in the reports.

**Challenges and how they have been overcome; Good Practice**

The key challenge over the past five years has been the integration of equality considerations in all core work of the organisation, which in many ways is the key challenge in implementing Section 75 overall. Whilst it cannot be argued therefore that this challenge was overcome during the period covered by the review, progress has been made on screening in some service areas (such as the Clinical Education Centre) where senior staff have provided leadership by requesting regular updates from leads on screening activities. The requirement for all service areas to provide a verbal update on screening activity at quarterly meetings of the BSO Equality Forum has likewise been an important measure to this end.

Limited knowledge, awareness and understanding of the needs, issues and experiences of people in individual equality groupings, both within the organisation as a whole and at individual staff level, remains a significant challenge. Progress has been made in those instances where such gaps have been recognised and staff actively engage with individuals and voluntary sector organisations to seek inputs, such as demonstrated by the work on Transgender Patient Management

Records by IT Services. In a similar way, on the employment side, significant learning outcomes have been achieved where individuals from under-represented groups have been brought into the organisation and interaction has been facilitated, whether as team members (such as through the work placement scheme) or as speakers at staff events.

A range of further good practice measures undertaken during the review period are identified in the following sub-section (see text highlighted in yellow in the table below).

**Lessons Learned and Going Forward**

| Theme 1:<br>Outcomes | |
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| **Lessons Learned** | **Going Forward** |
| **(a) Outcomes for Staff**<br><br>• In relation to the workplace, important outcomes have been achieved for people with a disability. In comparison, little evidence is available to show outcomes for staff in other equality categories or outcomes on good relations.<br><br>Equality legislation beyond Section 75 in relation to disability, both anti-discrimination legislation and additional public sector duties such as under the Disability Discrimination Order, may have contributed to the organisation's focus on this category. This is reflected and reinforced by the fact that the champion role at board level has been defined as a 'Disability Champion' rather than extending to other equality categories. | **(a) Outcomes for Staff**<br><br>• In relation to our workforce we will devote particular attention to identifying and seeking to meet the needs of our staff<br>  o from ethnic minority backgrounds (to include engaging with and listening to our staff to get a better understanding of the lived experience of racism in Northern Ireland and in Health and Social Care in Northern Ireland);<br>  o carers of elderly dependants or a person with a disability<br>  o people who identify as transgender or non-binary.<br><br>We will also examine the gender agenda (including the gender pay gap) in the BSO as well as the needs of the older workforce.<br><br>In any of this work, we will explore the scope for working together with Trust colleagues where this |

| | is likely to produce particular benefits. |
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| • Establishing <mark>Tapestry</mark>, the staff disability network, has been instrumental in creating a safe space for staff with a disability to share their concerns, views and experiences of the BSO as an employer. It has in effect enhanced the voice of staff who have a disability. To date, the network has not been drawn upon to inform BSO policy- and decision-making in relation to employment matters including recruitment and selection.<br>• The <mark>Disability Work Placement Scheme</mark> has been effective as a stepping stone towards gaining paid employment. It has likewise served to improve confidence, reduce social isolation and enhance mental health of participants. The scheme has allowed managers and teams to strengthen their knowledge and awareness of barriers for people with a disability in employment and how to develop into an inclusive workplace.<br>• There is a crucial need for sharing the knowledge and learning gained through the placement scheme on how best to support an individual with a disability with line managers throughout the organisation. At present, the level and experience of support by staff with a disability is largely determined by the understanding and attitude of their individual line manager. This likewise | • In relation to staff and candidates with a disability, we will build on the momentum and achievements over the past five years. Achieving greater consistency in the level of support provided by line managers including through mandatory training and sharing good practice will be a key focus, both in relation disability, caring responsibilities and beyond.<br>• We will seek to sustain the particular benefits that new working practices during the Covid pandemic have created for people with a disability and carers through working from home. We will ensure that we consider equality issues for all nine equality groupings as we plan for a return to the office and new working practices. |

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| applies to the other equality categories, in particular to staff with caring responsibilities. Management training needs to incorporate and reflect equality issues, based on the core value of compassion. Management training also needs to start earlier, targeting both junior and senior staff, to start instilling these behaviours in Band 3 supervision level. | |
| • Some important work undertaken during the review period in relation to staff and candidates who identify as transgender and non-binary has the potential to produce practical outcomes in supporting individuals in the transitioning process (such as by facilitating changes in names and titles and the appropriate use thereof from an early stage). | • To ensure that we build on the foundations laid through the introduction of our <mark>Gender Identity and Expression Employment Policy</mark>, we will develop protocols and guidance for staff and deliver mandatory training on gender identity. |
| **(b) Outcomes for Service Users**<br><br>• As regards the delivery of our functions, whilst evidencing how the BSO has made a tangible difference for people in each of the nine equality categories remains difficult, a number of examples demonstrate how support provided by the BSO to other HSC organisations contributes to facilitating positive outcomes. | • The main way to progress on making a difference for people in the nine equality categories will be the integration of equality screening in policy-and decision-making across all BSO service areas. |

| Theme 2:<br>Business Planning, Policy- and Decision-Making, Governance Arrangements ||
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| **Lessons Learned** | **Going Forward** |
| • Whilst reference is made in the documentation to support **annual business planning** by BSO service areas to the need to identify work that will require equality screening during the year, this is currently not accompanied by any associated reporting requirements. There is a clear opportunity to build on this to ensure ensuring that service areas develop an annual equality screening programme, based on the actions articulated in service area plans as a minimum set.<br>• In the absence of an annual equality screening programme ie. a programme of planned screening activity, monitoring of screenings remains largely reactive in nature rather than proactive. | • Service areas will be required to develop an annual screening programme as part of the annual business planning process and to report quarterly on progress. |
| • To date, the equality requirements have not been articulated in the BSO business case template nor in the **business case processes**.<br>• There is no evidence to show that equality issues and alternative policies/decisions that serve to better promote equality have been considered in the context of option appraisals. | • We will integrate the requirement to complete equality screenings into the process for development and approval of business cases. |

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| • **Equality screening** is mainstreamed in some areas of policy-making. These are largely limited to corporate affairs. There is evidence of recent progress on screening in some service areas, such as the Clinical Education Centre and IT Services as well as parts of Human Resources. However, significant gaps remain. Importantly, these relate to policies and decisions with clear equality implications. In short, we tend to screen policies that do not impact on people but policies/decisions that do are not being equality screened.<br><br>• To date, decisions have not been equality screened. | |
| • There are currently no robust **governance arrangements** in place to ensure that equality screening is mainstreamed in BSO policy- and decision-making.<br><br>• Policy documents are not accompanied by screening templates nor do they include summary equality information. Cover papers to SMT and Boards do not include an explicit assurance nor summary equality information.<br><br>• At the point of decision-making, SMT and Board members are not provided with evidence that the equality issues have been considered | • We will introduce a cover page for completion by the respective lead to accompany any policy or decision submitted to SMT and Board for approval or noting to include a summary of equality impacts identified in the screening, how these are addressed in the policy or decision, and details on where the completed screening template is publicly available.<br><br>• To ensure that equality screening is mainstreamed in decision-making throughout the BSO, the same requirements will be introduced at Directorate and service area level to capture |

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| appropriately or an assurance thereof. | policies and decisions that do not go to SMT/Board for approval but are equally subject to the statutory equality duties.<br><br>• Good practice in regular reporting on progress with screening activity at Directorate/service area level, such as it is implemented in the Clinical Education Centre, will be shared with all service areas.<br><br>• For HR policies in the first instance, we will develop a process map for new policies and policy reviews. This will mainstream equality screening and meaningful engagement with Section 75 groups into the development and review process for all policies and take on board the additional time required to undertake these. |

| Theme 3: Equality Monitoring and Engagement with Section 75 groupings, Access to Information and Services | |
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| **Lessons Learned** | **Going Forward** |
| • The quality of the equality data for BSO staff has significant limitations. Non-completion levels for the categories of dependents, sexual orientation, political opinion, ethnicity and disability at 70-80% (50% for disability) remain a particular concern. | • We will take action to make the case for and to further encourage staff to complete equality and diversity information to improve the quality of equality data. |
| • There is no evidence that **equality monitoring** is routinely undertaken and used in the development and review of policies relating to staff. | |
| • There is no evidence to suggest that the collection and use of equality monitoring data for all nine categories has been mainstreamed across all BSO functions. Some progress has been made in specific service areas, such as the Office for Research Ethics Committees Northern Ireland (ORECNI), the Clinical Education Centre, and the Procurement and Logistics Service (PaLS).<br>• The nature of the organisation's functions, such as in relation to IT Services, provides unique opportunities for the BSO to support the HSC in progressing equality monitoring system-wide. | • The key to progressing equality monitoring across all BSO service areas will be the mainstreaming of equality screening as the latter require robust equality data to enable the assessment of impacts across the nine equality categories. |

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| • While dedicated staff forums on disability, sexual orientation and gender identity exist within the HSC, to date we have not engaged with these in the development of Human Resources policies or decision-making processes as a matter of course. Neither have we capitalised on the opportunity they present for raising equality issues with us directly on a regular basis. | • We will approach the chairs of Tapestry and the HSC staff forum on sexual orientation and gender identity to discuss how we could best work together, including to inform HR policy development and review. |
| • In the main, the organisation has largely relied on trade unions in relation to raising equality issues and better understanding the needs of groups. Whilst their input is greatly valued we recognise that it is not sufficient under Section 75 as trade unions are not representative of specific equality groupings.<br>• To date, there is no evidence of any proactive efforts and the strategic development of links and working relationships with groups representing the interest and lived experience of Section 75 groups in relation to employment. | |
| • Engagement with voluntary sector organisations and individuals from Section 75 groups in relation to BSO functions is limited to a small number of service areas and specific programmes of work. | • We will identify priority functions and teams (including HR and Corporate Services and Recruitment Shared Services) for which engagement with voluntary sector organisations and individuals from Section 75 groups is essential. We will take a joint approach to |

| | developing such working relationships. |
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| • Adoption of an <mark>Accessible Formats Policy</mark> was an important milestone and has put in place the foundation for addressing key barriers to access to information and services. There is an urgent need to ensure that the principles and standards set out in the policy are adopted and implemented across all BSO service areas. | • We will develop an implementation plan for the roll out of the BSO Accessible Formats Policy.<br>• We will ensure that the design specifications for new systems relating to HR, Finance and Procurement as well as any new eLearning programmes meet accessibility standards. |

| Theme 4: Ensuring BSO staff assist the organisation in implementing Section 75 | |
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| **Lessons Learned** | **Going Forward** |
| • Reference to the Section 75 duties in all Job Descriptions is essential for making equality everybody's business in the organisation. A lack thereof also constitutes a missed opportunity to communicate to applicants and all new employees the organisation's commitment to promoting equality and good relations in the delivery of its functions. | • We will integrate (1) the requirement for all staff to assist the BSO in fulfilling its statutory duties under Section 75 of the Northern Ireland Act 1998 to promote equality of opportunity and good relations into all Job Descriptions and (2) for posts that include responsibilities for policy and decision-making specific reference to ensuring that equality screenings and Equality Impact Assessments are carried out. |
| • While defining training as mandatory is an important asset, the processes in place to ensure that staff complete equality training show certain gaps. Completion rates are not monitored organisation-wide nor are corporate targets set for these. Follow up, challenge and holding to account of teams and individuals not meeting the training requirements largely relies on line managers seeking assurance from employees. The current IT system does not support monitoring and reporting. Regular reporting arrangements to provide up to date records to | • Once the new Learning Management System is in place, the BSO will set completion targets and undertake six-monthly monitoring and reporting to SMT and line managers on progress against these. |

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| SMT and line managers on completion of equality training are not in place. | |
| • We recognise a gap in ensuring that senior decision-makers are fully trained on equality screenings and EQIAs. | • All senior decision-makers will undertake training on equality screening and EQIA within two years. |
| • The subjective nature of the current definition of the group of staff who must undertake equality screening and EQIA training poses additional barriers to effective monitoring and enforcement across the organisation. | • The BSO will introduce a new definition for the requirement for relevant staff to undertake equality screening and EQIA training. This will be based on staff bandings (band 5 and above) as a minimum set, with Directors responsible for identifying additional staff in need of the training. The latter will capture any further staff involved in policy- and decision-making up to band 4 inclusive. |
| • Disability Awareness Days for staff have contributed to increasing knowledge and understanding of barriers faced by people with a disability in the workplace and how staff can address these to meet particular needs. Interactive events with speakers sharing their lived experience and question & answer sessions appear to be particularly impactful. This approach could be replicated to raise awareness of the needs of other equality groupings. | • We will develop a rolling programme of staff awareness days to focus on a wider range of equality groupings. |
| • Identifying and meeting equality training needs of staff is most effective when this is rooted in a | • We will develop a rolling programme of staff training needs analysis for individual service |

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| customer care approach and based on an analysis of the equality profile of those impacted by the service ie. the customer base. | areas, rooted in a customer care approach and based on an analysis of the equality profile of those impacted by the service. |

| Theme 5: Leadership | |
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| Lessons Learned | Going Forward |
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| • The location of the lead responsibility for Section 75 implementation within the Customer Care and Performance Directorate provides a unique opportunity to align the equality mainstreaming agenda with planning, performance, service improvement, governance, and customer care agendas. There is scope for strengthening these links and making them more explicit. | • We will undertake equality initiatives/awards that are explicitly focused on the end customer (such as the Equality Commission's 'Every Customer Counts' initiative). |
| • The Equality Forum serves as an important vehicle to progress the mainstreaming of equality across the organisation. Non- or irregular attendance by some service areas has curtailed its full effectiveness.<br>• There is scope for strengthening the mainstreaming role of the forum through closer links with SMT on the one hand and Directorates/service areas on the other.<br>• The risk of equality being delegated to or perceived as falling to nominated equality leads (Forum members) needs to be addressed. Leadership on equality within Directorates/service areas needs to be strengthened. | • Directors/Heads of Service will ensure regular attendance of all service areas at the Equality Forum.<br>• SMT will take time more regularly during the year to hear about issues feeding up from the BSO Equality Forum.<br>• Senior teams within each Directorate/service area will provide greater leadership on equality, forge closer links with their respective nominated Forum member/s to widen ownership of the equality agenda and to ensure regular communication on equality/Forum matters. |

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| • Creating the role of a **Disability Champion** at BSO Board – and specifically for Non-Executive Director – has proved highly effective in not only visibly demonstrating leadership at the most senior level of the organisation but also enabling scrutiny and a voice on disability matters at board and committee level in practice.<br>• The work of the champion has been further enhanced by the establishment of the **Disability Champions Network**, a collaboration of Disability Champions across the 11 regional HSC organisations.<br>• We recognise the limitations of a sole focus on disability issues for successfully promoting equality for all nine equality groupings. | • We will widen the remit of the Board champion to become an Equality Champion in order to facilitate scrutiny and a voice across all equality categories at board level. |
| • The nature of its functions as supporting other HSC organisations provides unique opportunities for the BSO externally to provide leadership on equality by using its influence with others. | |

By December 2021, the BSO will develop a delivery plan to take forward the key commitments in relation to Section 75 implementation for the next five years, outlined above under 'Going Forward' for each theme.

**Appendix:**
**List of policies equality screened from 1 Apr 2016 to 31 Mar 2021 (as per quarterly equality screening reports)**

| Year | Policy Title | Decision |
|---|---|---|
| 2016-17 | Introduction of unisex bathrooms in Franklin Street | Screened out without mitigation |
| 2016-17 | Relocation of Procurement and Logistics Service (PaLS) Staff | Screened out with mitigation |
| 2016-17 | Clinical Education Centre Communications Strategy | Screened out with mitigation |
| 2016-17 | BSO Business Plan 2016-17 | Screened out with mitigation |
| 2016-17 | Provision of a Community Equipment and Ring Back Service for Continence Products Western Health & Social Care Trust by Business Services Organisation Procurement and Logistics Service (PaLS) | Screened out with mitigation |
| 2017-18 | Policy for the safeguarding, movement & transportation of records, files and other media | Screened out without mitigation |
| 2017-18 | Policy on validation and monitoring of professional registration (HSC Clinical Education Centre) | Screened out without mitigation |
| 2017-18 | Gender Identity and Expression - Employment Policy | Screened out with mitigation |
| 2017-18 | Draft Equality and Disability Action Plans 2018-23<br><br>Final Equality and Disability Action Plans 2018-23 | Screened out with mitigation |
| 2017-18 | Partial Retirement Policy | Screened out |

| | | with mitigation |
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| 2017-18 | Tapestry (our Disability Staff Network) Communication and Information | Screened out with mitigation |
| 2017-18 | Estates Policy | Screened out with mitigation |
| 2018-19 | Consent Guidance | Screened out with mitigation |
| 2018-19 | Infected Blood Scheme | Screened out with mitigation |
| 2018-19 | Harassment Policy & Procedure | Screened out with mitigation |
| 2018-19 | BSO Business Plan 2018-19 | Screened out with mitigation |
| 2018-19 | BSO Corporate Plan 2018-21 | Screened out with mitigation |
| 2018-19 | HSC Recruitment and Selection | Screened out with mitigation |
| 2018-19 | Research on Adults Lacking Capacity Studies | Screened out with mitigation |
| 2018-19 | Clinical Coding Policy | Screened out with mitigation |
| 2018-19 | Conflict, Bullying and Harassment in the Workplace Policy and Procedure | Screened out with mitigation |
| 2018-19 | Northern Ireland Picture Archiving and Communication System | Screened out with mitigation |
| 2019-20 | Manual Handling Policy | Screened out with mitigation |
| 2019-20 | Policy for the Safeguarding, Movement and Transportation of Records, Files and Other Media | Screened out with mitigation |

| 2019-20 | Records Management Policy | Screened out with mitigation |
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| 2019-20 | Risk Management Strategy<br><br>Procedures for the Management of Risk Registers June 2019 | Screened out with mitigation |
| 2019-20 | Employee 25 Years Service Award | Screened out without mitigation |
| 2019-20 | BSO Business Plan 2019-20 | Screened out with mitigation |
| 2019-20 | Adverse Weather Protocol | Screened out without mitigation |
| 2019-20 | Accessible Formats Policy | Screened out with mitigation |
| 2020-21 | BSO Annual Business Plan 2020-21 | Screened out without mitigation |
| 2020-21 | Environmental Management Policy | Screened out without mitigation |
| 2020-21 | BSO Risk Management Strategy including policy statement; and staff procedure for the management of risk registers | Screened out without mitigation |
| 2020-21 | Management of Change Screening | Screened out without mitigation |
| 2020-21 | Working From Home Policy | Screened out with mitigation |
| 2020-21 | Clinical Education Centre (CEC) - Education Delivery Plan | Screened out with mitigation |
| 2020-21 | ITS Staff Reintegration | Screened out |

| | | with mitigation |
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| 2020-21 | HSC Clinical Education Centre Education Code of Dress Policy (2020) | Screened out with mitigation |
| 2020-21 | ITS Patient Portal Leaflet | Screened out with mitigation |
| 2020-21 | Policy for Service User and Carer Representative Involvement within the HSC Clinical Education Centre | Screened out with mitigation |
| 2020-21 | Retire & Return Policy and Guidelines for Application | Screened out with mitigation |
| 2020-21 | HSC Clinical Education Centre Education Delivery Plan 2021/22 (Mental Health and Learning Disabilities Programmes) | Screened out with mitigation |
| 2020-21 | Voluntary Scheme for the Extra-Ordinary Payment of Unused Contractual Leave Entitlement | Screened out without mitigation |