

**EQUALITY COMMISSION FOR NORTHERN IRELAND****Strategic Investment Board Limited****Annual Progress Report 2007 – 2008  
on Section 75 of the NI Act 1998 and  
Section 49A of the Disability Discrimination Order (DDO) 2006**

Name of public authority

**Strategic Investment Board Limited (SIB)**

Equality Officer

Section 75 and DDO:

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**Executive Summary**

- What were the key policy/service developments made by the authority during this reporting period to better promote equality of opportunity and good relations and what outcomes were achieved?

The SIB Equality Scheme was approved by the Equality Commission in November 2005. In 2006-07 SIB screened the 48 existing policies and determined that the Equal Opportunities Policy should be subjected to a full EQIA. Some work was carried out on this EQIA in 2007-08 but the main focus of the year was the development of the second iteration of the Investment Strategy for Northern Ireland (ISNI 2008-2018). The Executive decided to carry out an EQIA at a strategic level on ISNI 2008-2018, the Programme for Government 2008-11 and the Budget for 2008-11. The EQIA of the Equal Opportunities Policy will be completed in the coming year.

- What are the main initiatives planned in the coming year to ensure the authority improves outcomes in terms of equality of opportunity and good relations for individuals from the nine categories covered by Section 75?

In the coming year, SIB will focus on –

- the EQIA of the Equal Opportunities Policy;
- reviewing the systems for monitoring the equality impacts of policies and updating them as necessary;
- providing refresher training for officers and awareness training for new employees.

- Please give examples of changes to policies or practices which have resulted in outcomes. If the change was a result of an EQIA please tick the appropriate box in column 3:

	Outline change in policy or practice which have resulted in outcomes	Tick if result of EQIA
Persons of different religious belief	• See below	
Persons of different political opinion	• See below	
Persons of different racial groups	• See below	
Persons of different age	• See below	
Persons with different marital status	• See below	
Persons of different sexual orientation	• See below	
Men and women generally	• See below	
Persons with and without a disability	• See below	
Persons with and without dependants	• See below	

The EQIA at a strategic level on ISNI 2008-2018, Programme for Government and the Budget concluded that delivering significant investment and improvements to Northern Ireland's infrastructure is

likely to have a positive impact on all Section 75 groups, both directly and indirectly by contributing to economic growth, social progress and environmental protection. It is anticipated, however, that some areas of infrastructure investment will have a differential impact on a number of the Section 75 groups. That impact is likely to be positive and addresses recognised need. In this context, investing in infrastructure has the potential to promote equality and good relations while addressing issues of exclusion and marginalisation.

## Section 1: Strategic Implementation of the Section 75 Duties

- Outline evidence of progress made in developing and meeting equality and good relations objectives, performance indicators and targets in corporate and annual operating plans during 2007-08.

The SIB Equality Scheme includes a commitment to integrating objectives and targets relating to the statutory equality duties into the 3 year corporate plan and the annual business plan as appropriate (Section 3.5). The 2007-08 business plan included specific references to Section 75 duties and a specific business target to implement the action plan set out in the approved Equality Scheme. Work continued throughout the year to implement the action plan, with the main focus being the EQIA at a strategic level on ISNI 2008-2018, Programme for Government and Budget. This work was led by the OFMDFM, supported by SIB and DFP.

## Section 2: Screening

- Provide an update of new/proposed/revised policies screened during the year.

Title of policy subject to screening	Was the <u>F</u> ull Screening Report or the <u>R</u> esult of initial screening issued for consultation? <i>Please enter <u>F</u> or <u>R</u></i>	Was initial screening decision changed following consultation? <u>Y</u> es/ <u>N</u> o	Is policy being subject to EQIA? <u>Y</u> es/ <u>N</u> o? If yes indicate year for assessment.
ISNI 2008-2018	F	N	Y – carried out in 2007-08

### Section 3: Equality Impact Assessment (EQIA)

- Please provide an update of policies subject to EQIA during 2007-08, stage 7 EQIA monitoring activities and an indicative EQIA timetable for 2008-09.

#### EQIA Timetable – April 2007 - March 2008

Title of Policy EQIA	EQIA Stage at end March 08 (Steps 1-6)	Outline adjustments to policy intended to benefit individuals, and the relevant Section 75 categories due to be affected.
ISNI 2008-2018	6	The EQIA at a strategic level on Programme for Government, ISNI 2008-2018 and Budget did not identify any potentially adverse impacts and therefore no adjustments were made to the policy as a result of the EQIA. The analysis concluded that the delivery of infrastructure investment has the potential to have a positive, though differential impact on all Section 75 groups.
Equal Opportunities	2 (part)	The policy is being subjected to EQIA because of the under-representation of women in the SIB workforce. When completed, the EQIA will identify potential methods of attracting more women to apply for senior posts in the organisation.

- Where the EQIA timetable for 2007/08 (as detailed in the previous annual S75 progress report to the Commission) has not been met, please provide details of the factors responsible for delay and details of the timetable for re-scheduling the EQIA/s in question.

The EQIA of the Equal Opportunities Policy was not completed in 2007-08 as anticipated. The delay was partly due to the need to appoint consultants to assist with the implementation of the Equality Scheme and partly because of the resources required to undertake the EQIA of ISNI 2008-2018.

It is now expected that the EQIA report will be circulated for consultation in the autumn of 2008 and completed by the end of the year.

Ongoing EQIA Monitoring Activities April 2007- March 2008

Title of EQIA subject to Stage 7 monitoring	Indicate if differential impacts previously identified have reduced or increased	Indicate if adverse impacts previously identified have reduced or increased
None		

2008-09 EQIA Time-table

Title of EQIAs due to be commenced during April 2008 – March 2009	Existing or New policy?	Please indicate expected timescale of Decision Making stage i.e. Stage 6
Equal Opportunities Policy	Existing	January 2009

**Section 4: Training**

- Please outline training provision during the year associated with the Section 75 Duties/Equality Scheme requirements including types of training provision and conclusions from any training evaluations.

The SIB Equality Scheme includes a commitment to developing an effective training programme for all staff (Section 6.1) in order to –

- raise awareness of current anti-discrimination legislation and the statutory equality duties; and
- provide those employees involved in implementing various aspects of the Equality Scheme with the necessary skills and knowledge to do this work effectively.

Initial awareness training was provided for all staff in November 2003 and refresher training and awareness training for new employees is provided each year. The latest course in May 2007, which was attended by all staff, included –

- training on the new disability duties;
- an update on equal opportunities legislation;
- progress on implementing the SIB Equality Scheme;
- report on the Commission Section 75 effectiveness review; and
- discussion on the equality implications arising from recent infrastructure projects.

SIB has a small workforce and so it has been possible to include all staff in all training sessions. The training has increased awareness of the

statutory equality duties and has provided an opportunity for staff to discuss the significance of equality of opportunity in the work carried out by SIB.

## Section 5: Communication

- Please outline how the authority communicated progress on delivery of the Section 75 Duties during the year and evidence of the impact/success of such activities.

There are three specific measures set out in the SIB Equality Scheme which relate to the communication of progress on the delivery of the statutory equality duties –

- monthly progress reports to the Board (as part of the standard progress report on business objectives) on achievements against the objectives and targets relating to Section 75 duties which have been integrated into the corporate plan and the annual business plan (Section 3.5);
- review of targets relating to Section 75 duties included in the personal performance plans of all staff directly engaged in this work (Section 3.6) – this is carried out as part of the annual performance review in April each year;
- annual review of progress towards implementing the arrangements in the Equality Scheme (Section 3.7) – the findings of this review were reflected in the annual progress report to the Equality Commission submitted in August 2007. This report was also made available on the SIB website and drawn to the attention of all staff.

In addition, a quarterly report is made to the Board on all equality issues.

## Section 6: Data Collection & Analysis

- Please outline any systems that were established during the year to supplement available statistical and qualitative research or any research undertaken/commissioned to obtain information on the needs and experiences of individuals from the nine categories covered by Section 75.

The main focus of activity in 2007-08 was assisting OFMDFM in the EQIA at a strategic level on Programme for Government, ISNI 2008-

2018 and the Budget. This entailed extensive data collection and analysis on the social, economic and environmental impacts of infrastructure investment.

With regard to employees, in 2006 SIB extended the equal opportunities monitoring form issued with application forms for vacant posts in order to collect data on all of the Section 75 categories. Towards the end 2007-08, as part of the EQIA of the Equal Opportunities Policy, a questionnaire was issued to all staff appointed prior to 2006 requesting further Section 75 information and providing an opportunity to comment on the current policy.

- Please outline any use of the Commission's Section 75 Monitoring Guide.

The monitoring questionnaire circulated to staff made extensive use of the recommended wording in Appendix A of the Commission's Section 75 Monitoring Guide.

## **Section 7: Information Provision, Access to Information and Services**

- Please provide details of any initiatives/steps taken during the year, including take up, to improve access to services including provision of information in accessible formats.

### **Access to information**

In line with the commitment in the SIB Equality Scheme (Section 7.3), a review was undertaken during 2006-07 of the arrangements for providing information in alternative formats. The conclusions of the review were that –

1. Adequate arrangements are in place to provide documents in alternative formats on request.
2. No such requests have been received to date and there is no reason to believe that the demand will increase significantly.

No requests were made in 2007-08.

### **Access to services**

As SIB does not provide services directly to the public, the key issues

relate to the general availability of information.

In order to promote public access, SIB makes a considerable amount of information available on its website, including general information about SIB itself and the projects it supports and details of the SIB Publication Scheme. The website is available in a text only version to assist those with visual impairment. The Publication Scheme includes a commitment to providing information in alternative accessible formats on request.

No information is available on uptake of the website. There were no requests for alternative formats under the Publication Scheme.

### **Section 8: Complaints**

- Please identify the number of Section 75 related complaints:
  - received and resolved by the authority (including how this was achieved);
  - which were not resolved to the satisfaction of the complainant;
  - which were referred to the Equality Commission.

SIB has developed a procedure for dealing with Section 75 complaints but no complaints have been received to date.

### **Section 9: Consultation and Engagement**

- Please provide details of the measures taken to enhance the level of engagement with individuals and representative groups during the year.

During 2007-08, SIB consulted and engaged with representative groups in relation to the screening and subsequent EQIA at a strategic level on Programme for Government, ISNI 2008-2018 and the Budget. The engagement process included a number of face to face meetings. There was a high level of response to the consultation, in terms of both the number of responses received and the depth of the comments made. All comments were taken into account when decisions were made and a full report of the consultation, showing the action to be taken as a result, was published (by the OFMDFM).

**Section 10: The Good Relations Duty**

- Please provide details of additional steps taken to implement or progress the good relations duty during the year. Please indicate any findings or expected outcomes from this work.

In general, SIB has taken forward the 'good relations' duty alongside the requirement to promote equality of opportunity. All awareness training includes information on the duty to promote good relations and, in particular, references to "A Shared Future" and the type of initiatives which are being taken forward by Government Departments.

Any opportunities to promote good relations will be identified and considered as they arise.

- Please outline any use of the Commission's Good Relations Guide.

No particular use was made of the Commission's Good Relations Guide in 2007-08.

**Section 11: Additional Comments**

- Please provide any additional information/comments

None.

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**Annual Report July 2007/ March 2008  
'Disability Duties' Questions**

**1. How many action measures for this reporting period have been?**

**4**

Fully  
Achieved

**2**

Partially  
Achieved

**0**

Not  
Achieved

**2. Please outline the following detail on all actions that have been fully achieved in the reporting period.**

2 (a) Please highlight what **public life measures** have been achieved to encourage disabled people to participate in public life at National, Regional and Local levels:

Level	Public Life Action Measures	Outputs <sup>1</sup>	Outcomes / Impact <sup>2</sup>
National <sup>3</sup>	Encourage disabled people to participate in consultation meetings	Measures taken to ensure disabled people/ organisations were involved in consultation meetings on ISNI 2008-2018	Comments received on issues affecting disabled people
Regional <sup>4</sup>			
Local <sup>5</sup>			

<sup>1</sup> **Outputs** – defined as act of producing, amount of something produced over a period, processes undertaken to implement the action measure e.g. Undertook 10 training sessions with 100 people at customer service level.

<sup>2</sup> **Outcome / Impact** – what specifically and tangibly has changed in making progress towards the duties? What impact can directly be attributed to taking this action? Indicate the results of undertaking this action e.g. Evaluation indicating a tangible shift in attitudes before and after training.

<sup>3</sup> **National** : Situations where people can influence policy at a high impact level e.g. Public Appointments

<sup>4</sup> **Regional**: Situations where people can influence policy decision making at a middle impact level

<sup>5</sup> **Local** : Situations where people can influence policy decision making at lower impact level e.g. one off consultations, local forums.

2(b) What **training action measures** were achieved in this reporting period?

	Training Action Measures	Outputs	Outcome / Impact
1	Provide training on disability duties for all staff and office holders involved in the implementation and/or monitoring of the Disability Action Plan	One training session held in May 2007 for all staff	Increased awareness of disability duties
2	Include awareness training on the disability duties in induction briefings	7 briefings carried out for 7 staff during their induction	Increased awareness of disability duties

2(c) What Positive attitudes **action measures** in the area of **Communications** were achieved in this reporting period?

	Communications Action Measures	Outputs	Outcome / Impact
1	No specific measures		

2 (d) What action measures were achieved to '**encourage others**' to promote the two duties:

	Encourage Others Action Measures	Outputs	Outcome / Impact
1	No specific measures		

2 (e) Please outline **any additional action measures** that were fully achieved other than those listed in the tables above:

	Action Measures fully implemented (other than Training and specific public life measures)	Outputs	Outcome / Impact
1	Mainstream consideration of disability duties into the policy development process and amend the screening template.	Template amended in July 2007. Implications of ISNI 2008-2018 for the disability duties assessed during the screening process.	Consideration given to the disability duties during the development of ISNI 2008-2018.

### 3. Please outline what action measures have been **partly achieved** as follows:

	Action Measures partly achieved	Milestones <sup>6</sup> / Outputs	Outcomes/Impacts	Reasons not fully achieved
1	Review existing policies in relation to the disability duties and revise accordingly	The review has been carried out but consultation on the findings and recommendations has not yet been completed.	Equality awareness training for new staff has been revised to include good practice on communication with disabled people. Other actions will be implemented when the consultation has been completed.	Other priorities
2	Draw disability duties to the attention of all staff and office holders	All staff attended a training session in May 2007 and were provided with information on the disability duties. Written guidance will be provided to all staff for inclusion in the staff handbook in the near future.	All staff are aware of the disability duties.	The training session was considered to be sufficient in terms of drawing attention to the disability duties in 2007. Written guidance will be provided in 2008 as a reminder.

<sup>6</sup> **Milestones** – Please outline what part progress has been made towards the particular measures; even if full output or outcomes/ impact have not been achieved.

**4. Please outline what action measures have not been achieved and the reasons why?**

	Action Measures not met	Reasons
1	None	

5. What **monitoring tools** have been put in place to evaluate the degree to which actions have been effective / develop new opportunities for action?

(a) Qualitative

No specific monitoring tools put in place.

(b) Quantitative

Screening reports are monitored to ensure that consideration is being given to the disability duties in the course of policy development.

6. As a result of monitoring progress against actions, has your organisation either:

- made any **revisions** to your plan during the reporting period or
- taken any **additional steps** to meet the disability duties which were **not outlined in your original** disability action plan / any other changes.

No

7. Do you intend to make any further **revisions to your plan** in light of your organisations annual review of the plan? If so, please outline proposed changes?

No