

Equality analysis form

If the activity you are planning to analyse is covered by an existing Equality Analysis or a relevant former Equality Impact Assessment, please use Section 2 of the form to highlight any updated information. The updated form should be sent through to the Equality and Diversity Unit for feedback, the start of the online consultation process and publication.

Section 1

Equality Analysis Screening

The following questions will identify whether a full Equality Analysis will be required. Please read the Equality Analysis guidance prior to completing the screening.

1. Name of the activity (strategy, policy, practice etc)

Maximising performance 2020

2. Will this activity have the potential to deliver positive outcomes for students, staff and/or visitors from equality groups? Please provide evidence for your answer.

Effective performance management of staff leading to higher performance and increased organisational capability. Positive impact on staff, students and visitors.

3. Will this activity have the potential to create negative impacts on students, staff and/or visitors from equality groups? Please provide evidence for your answer.

Possibility of short-term negative impact where there is more active management of performance issues. This may result in increased tension for staff and managers. Possible increase in workload for managers and HR staff where cases to be managed increase.

4. Does the activity have the potential to impact equality groups in the following ways:

- Access to or participation in UWE Faculties or Professional Services?
- Levels of representation across the UWE workforce?
- Student experience, attainment or withdrawal?
- Staff experience?

Please indicate YES or NO. If the answer is YES then a full analysis must be carried out. If the answer is NO, please provide a justification.

Yes

Equality analysis screening sign off:

Faculty Dean or Head of Service	Debbie England
Faculty / service	Human Resources
Date	November 2015

Please return the completed form back to the Equality & Diversity Unit for feedback and publication

Section 2

Full Equality Analysis

1. Name of the activity (strategy, policy or practice etc)

Maximising performance 2020

2. What is the aim of the activity (objective or purpose)?

In line with the Performance 2020 vision, to deliver effective and efficient performance management approaches, processes and systems to increase organisational capability.

3. If amending a current activity, what changes are proposed?

Review of current PDR process (form and guidance).
Link to KPI management information
Revised training programme – setting objectives, difficult conversations and giving and receiving feedback
Staff engagement in mandatory training
Informal day to day management of performance
Creation of a high performance culture

4. Who is responsible for developing and delivering the activity?

Project manager (Pam Fitzsimmons) and maximising performance HR team.
Delivery of activities through faculty and service managers.

5. What measures will be used to assess whether the activity is successful?

PDR completion rates improved
2014 and 2016 staff survey results – questions relating to line management and learning and development questions (manager deals with performance, 1 to 1 meetings, PDR completion and usefulness).
Staff survey engagement index
Exit questionnaires
Number and level of formal performance cases – HR Advice team.
Number and level of formal grievances related to management of performance – HR Advice team.
Number of managers attended new training courses (setting objectives, difficult conversations and giving and receiving feedback)

6. Does the activity have a potentially adverse impact on equality groups, in terms of employment issues and/or service delivery for students and/or staff? In the table below, please give evidence to support your yes or no answers. If the answer is not known, indicate how you will source evidence.

Meeting the public sector equality duty

Please also use the table below to demonstrate whether the activity has the potential to eliminate unlawful discrimination, advance equality of opportunity and foster good relations.

	Potential impact / issues (both positive and negative)	Mitigating actions or actions to further enhance positive impact	Timing and progress	Actions (initials)
All equality groups	<p>Perceived differential treatment for equality groups in performance management processes due to possible unconscious bias of reviewer.</p> <p>There may be a lack of high performing role models for all equality groups.</p> <p>Managers may give watered down feedback to equalities groups to avoid accusations of harassment etc. This means these individuals get less constructive feedback and consequently fewer chances to develop.</p>	<p>360 feedback (for senior and some middle managers) to identify any issues relating to inclusivity.</p> <p>Communication to staff of expectations.</p> <p>All managers to receive E&D training which includes unconscious bias.</p>		
Women and men	<p>More women work part-time (70% of part-time staff are female: 2014 Staffing Compendium) which impacts on their ability to attend development activities/team meetings. Similarly, the introduction of shared parental leave may impact men being able to attend development activities/team meetings.</p> <p>More women likely to undertake role of carer which may impact on their attendance at work.</p>	<p>Consideration can be given to arranging events on different days of the week.</p> <p>Need to look at providing flexibility in planning development events – selection of days/dates available and timing of events. Giving people enough notice to make alternative caring arrangements.</p>		

	<p>Women working in male dominated areas (eg technical, senior management) have lack of role models and potential reduced aspiration to develop/progress their careers. Similarly men may work in female dominated area (eg HR).</p> <p>Women may feel pressure to perform – not feeling able to take time off for caring/maternity leave (only 1 senior manager taken maternity leave in last 3 years: 2014 Staffing Compendium).</p>	<p>Communication to staff of high achievers – from outside the organisation, if necessary.</p>		
Trans people	<p>Trans staff may or may not be out at work. May not wish to draw attention to their status through discussions with managers. Managers may feel uncomfortable in communications which could impact discussions.</p> <p>Time taken off for treatment will result in fewer working days to complete workload; possibly with no knowledge of reason for absence. This may impact on performance.</p>	<p>All managers to receive E&D training.</p>		
Black and minority ethnic groups	<p>Possible misunderstandings in communications around performance. Cultural differences may cause confusion/offence</p> <p>Often constructive/ honest feedback not received because some feedback providers fear being labelled racist etc; which does not help staff to develop. (Staff feedback received at Equality Engagement Event 10 June 2015).</p> <p>BME staff feel they need to overcompensate by agreeing to higher performance targets</p> <p>May not wish to draw attention to their status through discussions with managers. Managers may feel uncomfortable in communications which could impact discussions</p>	<p>Clear processes and communications.</p> <p>Training for managers to include awareness of this issue.</p> <p>Training for managers to include awareness of this issue.</p> <p>All managers to receive E&D training</p>		

<p>Disabled people</p>	<p>Adjustments needed to processes (eg PDR meetings – support worker, technology). Access to resources.</p> <p>Staff with mental health issues may not be able to recognise their performance issue/behaviour.</p> <p>If not disclosed, managers unable to make adjustments and could lead to performance issues.</p> <p>Staff feel they have to overcompensate by agreeing to higher performance targets.</p> <p>Disability leave = less days to work which may impact on performance.</p> <p>May not wish to draw attention to their status through discussions with managers. Managers may feel uncomfortable in communications which could impact discussions</p>	<p>PDR process to include exploration of whether staff experience any barriers that may prevent them from fulfilling the job requirements and/or realising their potential e.g. issues relating to disability, the provision of equipment, and the working environment. This should also be explored in a less formal meeting.</p> <p>Managers to be referred to mental health guidance on holding meetings.</p> <p>General communication to all staff to encourage disclosure and outline support.</p> <p>Training for managers to include awareness of this issue.</p> <p>All managers to receive E&D training</p>		
<p>Younger or older people</p>	<p>Percentage of workforce aged 65+ expected to increase (risen from 2.0% in 2012 to 2.7% in 2014. Remains at 2.7% in 2016: 2014/16 Staffing Compendium). Possible increase in performance issues with older staff due to health conditions.</p> <p>Perception that older staff may be “coasting” and managers may not give objectives or opportunities for training.</p> <p>Older staff feel learning and development opportunities are helping them to do their job and develop themselves less than younger staff (2014 Staff survey).</p> <p>Younger staff are more engaged than older staff (2014 Staff survey) Younger – need opportunities to develop. Concern if not given</p>	<p>All managers to receive E&D training</p> <p>PDR process to include exploration of career aspiration/plan.</p> <p>Different training approaches/methods offered to different recognise learning styles</p>		

People of different religion and beliefs	<p>Different cultural backgrounds have different communication norms.</p> <p>Religious observance may impact on attendance at meetings/development activities.</p> <p>Different beliefs may value team contribution and recognition and may not wish to stand out as an individual. May prefer collectivist rather than individualistic approach.</p> <p>May not wish to draw attention to their status through discussions with managers. Managers may feel uncomfortable in communications which could impact discussions</p>	All managers to receive E&D training		
Lesbian, gay, bisexual people	<p>Trans staff may or may not be out at work. May not wish to draw attention to their status through discussions with managers. Managers may feel uncomfortable in communications which could impact discussions.</p> <p>LGBT people reported a far more negative experience of UWE; particularly in the area of development than heterosexual staff (2014 Staff survey).</p>	All managers to receive E&D training		
Marriage and civil partnership	None			
Pregnancy and maternity	<p>Pregnancy may lead to increased stress; which may impact on health. Absence during maternity leave may impact on their ability to attend development activities and performance process (eg PDR).</p> <p>Ongoing support needed for staff returning from maternity leave. Managers to ensure clear expectations given to staff and review performance over whole</p>	Existing guidance states: If PDR coincides with maternity leave, managers should discuss most appropriate timing of meeting. If		

	period. (Staff feedback received at Equality Engagement Event 10 June 2015).	employee missed the review, one or two objectives to be set for return to work.		
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7. Please give evidence of how you have engaged equality groups in the equality analysis process. Is further engagement required?

Discussions held and feedback received from staff at Equality Engagement Event – 10 June 2015

8. What action can be taken to mitigate any potential negative impacts or address different needs? Please comment and then complete an action plan (see appendix 1).

See additional Actions column above

9. Please indicate the level of equality relevance:

High

Medium

Low

10. **Equality analysis sign off:**

Faculty Dean or Head of Service	
Faculty / service	
Date	

Please return this form to the Equality and Diversity Unit for feedback, the start of the consultation process and publication.

Equality analysis - action plan

Appendix 1

Name of activity: Performance 2020: Maximising performance project

Plan completed by: Pam Fitzsimmons

Service / faculty: Human Resources

Issues	Actions required	Responsible Person	Resources required	Target date	Success Indicators	What progress has been made?
Information/data required	Updated staffing data when available from the Staffing Compendium 2015	Pam Fitzsimmons	None	May 2016	Amended in EA as appropriate	
Consultation	Consultation with staff networks on EA EEE event Staff Voice Group	Vicky Swinerd Pam Fitzsimmons		2015 March 2016		Written feedback on new PDR process received
Monitoring and review arrangements	Reviewed as part of Strategic Board monitoring	Pam Fitzsimmons	None	ongoing		
Publication						
Other actions	E&D training for managers to be arranged	Pam Fitzsimmons	Budget for external trainer	Starts April 2016	Attendance at workshop and positive feedback from	Identified trainer, initial discussion about content of workshop, costs

	Training to be scheduled on different days of the week	Karl Daly	Access to appropriate training rooms	When mandatory training commences	managers	agreed, budget approved. Mandatory training agreed by P2020 Strategic Programme Board
	PDR scheme to include performance standards	Pam Fitzsimmons	None	New scheme available from June 2016	Scheduling possible on different days	Training being planned
	Mental health awareness training to be available	Pam Fitzsimmons	Led by SPS and hence no additional budget	From April 2016	Published scheme	Views being gathered on new PDR scheme requirements. Example performance expectations being considered
	Bite size and espresso sessions to be offered to managers on disability	Pam Fitzsimmons/Lo uise Davis	None additional	Ongoing in 2016	Attendance on course and positive feedback	Agreed will be offered by SPS and dates being scheduled
					Positive attendance and feedback	Sessions already in place and will continue as appropriate

Please return form to the Equality and Diversity Unit

