

Enterprise
Division



and
ables



Screening

Question A1

Please tick any of the following which apply to your proposal:

- a) it contributes to achieving one or more of **HIE's equality outcomes 2017-21**:
- ☐ increasing the diversity of leadership and workforce participation in the Highlands and Islands
 - ☐ people better recognise and understand prejudice-based incidents and hate crimes and feel confident reporting them
 - ☐ growing the working age population in every part of the Highlands and Islands
- b) it contributes to the following in relation to any of the **protected characteristics** (age, disability, gender, gender-reassignment, marriage or civil partnership, maternity or pregnancy, race, religion or belief, sexual orientation)
- ☐ eliminating unlawful discrimination, victimisation or harassment
 - ☒ **advancing equality of opportunity:-**
 - by removing or minimising disadvantage for a group(s) of people
 - by meeting the needs of particular groups which differ from the needs of others
 - by encouraging participation in public life for a group(s) of people
 - by taking account of disabled people's impairments
 - ☐ **fostering good relations:-**
 - by tackling prejudice
 - by promoting understanding between groups of people
- c) ☐ it addresses **known areas of inequality** such as the gender pay gap, youth out-migration, occupational segregation, in-work poverty, income inequality, inequalities in educational attainment
- d) ☐ it considers proposals of a strategic nature. Consider the impact of **socio-economic disadvantage**:
- in communities within particular disadvantaged places
 - within particular disadvantaged communities of interest such as disabled people, young people leaving care etc.
 - specifically for people in rural, remote and islands areas
- e) ☐ it uses **EU funding**; assessment is mandatory for European Structural Fund Programmes

If you have ticked any of the options a) to e) above proceed now to the Assessment on page 4.
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If you have **not ticked** any of the options a) to e) this indicates that your proposal is not relevant to equality and not likely to address socio-economic disadvantage. You should sign off the screening below.

Signing off the screening

You must include in relevant approval papers:

- a) a statement to confirm that the proposal has been screened for impact in relation to equality and socio-economic disadvantage and that full assessment is not required
- b) a statement to confirm, if your proposal includes procurement activity above OJEU threshold levels, that there is no need to consider award or contract performance criteria related to equality.

Assessment of your proposal ends at this stage.

Name of person who carried out the screening:	Shirley Tennant
Job Title:	Development Manager
Date of decision:	20/3/19

This document must be retained with your strategy, policy or programme papers. Screening documentation is subject to the provisions of the Data Protection Act 1998 and Freedom of Information Act 1998.

Assessment to address inequality and socio-economic disadvantage

Requirement to publish impact assessments

Impact assessments must be published, demonstrating that HIE has paid due regard to equality in the development and delivery of our functions. Assessments are subject to the provisions of the Data Protection Act 1998 and Freedom of Information Act 1998.

Question B1

What is the purpose of the proposal; how will it achieve this; who will benefit from it?

The proposal will significantly contribute to developing an enterprising third sector by assisting organisations to plan and operate in a more efficient and 'business-like' way and will contribute to increasingly enterprising and resilient individuals, organisations and communities across the HIE area.

Board members of HIE account managed social enterprises and ambitious new / pipeline organisations embarking on an asset acquisition or service provision – access to a flexible learning product to increase personal and organisation's awareness of their governance strengths and weaknesses.

HIE's account managers – will know they are investing time and finance in social enterprises that have the ability to maximise the benefit from existing and emerging opportunities.

HIE as an economic and social development agency – meeting HIE's commitment to grow the impact of social enterprises by providing access to relevant information and learning to enable them to deliver their objectives.

Question B2

What evidence do you have of the likely impact your proposal on different groups of people (younger or older people, men or women, disabled people etc.) or communities within particular disadvantaged places, including rural, remote or islands areas?

What does the evidence tell you

Most volunteer board members who worked could not take the time off to attend a ½ or 1 day workshop. Many board members are working people with other commitments. A high percentage of volunteers are women who tend to have caring roles.

Source of evidence

Feedback from board members being offered training workshops through previous contracts and direct feedback to account managers.

The difficulty involved in travelling can make it a challenge to access training for the disabled.	Board feedback comments-
The time and expense, and Scottish weather, involved in travelling to training impacts people on lower income such as older people which is the demographic of most boards. This would also impact people from rural areas where transport is not always available and distance, if using ferries for example, can mean overnight stays.	Many find difficulty finding time to attend; Volunteers can commit a limited amount of their time.... Weather got in the way
The proposal is for the supplier to travel to the client for the face to face workshop. The training offered will be digital, short and flexibly times to be accessible to as many people as possible.	

Question B3

If there are evidence gaps which prevent you from understanding the likely impact on groups of people or communities affected, how will you fill the gaps?

Question B4

Note below any positive or adverse impact which may occur as a result of the planned delivery of your proposal. Leave blank any groups you consider will not be disproportionately affected.

Tick

Nature of anticipated impact for groups of people likely to be affected

Age – younger or older people, people of a particular age

X

Positive impact identified 😊

Social enterprises often provide lifeline, local and amenity services throughout our region that often directed at older people / people with young families. They frequently provide employment in remote areas and can also provide opportunities for young people to stay and work, helping to secure the economic future of the area. This project is designed to support and strengthen community and social enterprises.

Adverse impact identified ☹️

Disability - people who have a disability (physical or mental health condition, long term illness)

X

Positive impact identified 😊

This project will be delivered locally and digitally to enable access to the product, taking attendee's constraints and other commitments into account and reducing the attendee's difficulty, time and cost of travel.

□

Adverse impact identified 😞

Gender - men or women

□

Positive impact identified 😊

□

Adverse impact identified 😞

Gender-reassignment - people who have undergone or plan to undergo gender re-assignment

□

Positive impact identified 😊

□

Adverse impact identified 😞

Marriage or civil partnership - people who are married or in a civil partnership

□

Positive impact identified 😊

□

Adverse impact identified 😞

Pregnancy and maternity - women who are pregnant or linked to maternity

X

Positive impact identified 😊

□

Adverse impact identified 😞

Race - people of diverse race, nationality or ethnicity

☐ Positive impact identified 😊

☐ Adverse impact identified 😞

Religion or belief - people of diverse faiths or beliefs

☐ Positive impact identified 😊

☐ Adverse impact identified 😞

Sexual orientation - lesbian, gay, bisexual or transgender people

☐ Positive impact identified 😊

☐ Adverse impact identified 😞

Question B5

General Equality Duty

In what way will your proposal contribute to:

- eliminating unlawful discrimination, victimisation or harassment
- advancing equality of opportunity (by removing/minimising disadvantage, meeting the needs of particular groups, encouraging participation in public life, taking account of disabled people's impairments)
- fostering good relations (by tackling prejudice or promoting understanding)

Through this project HIE will support non-profit-distributing social enterprises that are community-led, community-controlled, and have open membership to all people living in the defined community. Many of the organisations supported have equality policies in place.

Removing the need to travel and take time away from other commitments by offering digitally flexible training will minimise the disadvantage of living in a remote or rural area. It will also meet the needs of carers and others who may have difficulty accessing training offered at set times. Digitally available training removes the need for disabled board members to travel and will also encourage wider participation throughout communities.

Question B6

Economic, social and cultural (human) rights

HIE is well placed to create the conditions in which economic, social and cultural rights can be realised, such as working towards:

- an adequate standard of living e.g. Minimum Income Standard, addressing poverty
- access to well-paid employment for all e.g. job creation, income levels
- just and favourable work conditions e.g. encouraging inclusive workforce practices
- social participation and community confidence e.g. inclusive capacity building and representation

In what way will your proposal help people realise their economic, social or cultural rights?

Identify any areas where there is risk of preventing individuals from realising their human rights. Provide justification where this is considered a proportionate response to achieving the overall aim of the proposal.

Social enterprises focus is on social and environmental change, led by the values and equality, inclusiveness and putting people and planet first. This project is designed to raise the standard of governance within our social enterprise clients and will contribute to increasingly enterprising and resilient individuals, organisations and communities across the HIE area.

Question B7

Socio-economic impact

Public authorities, including HIE, are expected to consider how to address socio-economic disadvantage, when taking decisions of a strategic nature, such

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as economic development strategy, setting budgets for key investment choices, city / region deals etc. Consider how this might impact on:

- communities within particular disadvantaged places
- particular disadvantaged communities of interest (e.g. young people leaving care; disabled people; people from minority ethnic communities)
- people in rural, remote and islands areas

Disadvantaged places

In what way does your proposal address socio-economic disadvantage in communities within particular disadvantaged places?

Disadvantaged communities of interest

In what way does your proposal address socio-economic disadvantage within communities of interest not already outlined in question 5 above?

Rural, remote, and islands areas

In what way does your proposal address the specific nature of socio-economic disadvantage experienced by people in rural, remote and islands areas?

Social enterprises play an important role in the economic vitality of the Highlands and Islands, particularly in remote and rural areas where they provide the support and services that the smaller populations and smaller customer bases make provision of, expensive for the public sector and unprofitable for the private sector.

Removing the need to travel and time away from other commitments by offering workshops in the client area and digitally flexible training through this project will remove travel costs and minimise the disadvantage of living in a remote or rural area.

Equal Opportunities - “to increase the opportunities within the programme for all groups and to prioritise and adapt support for groups facing particular disadvantages to participation”

Clarify precisely how the proposal takes account of and reflects the diverse needs of any target group(s).

Outline how the proposal will overcome any potential barriers to access to participation and how policies in place will make a positive difference.

Social inclusion - “to ensure that economic growth and tackling exclusion go hand in hand to help people overcome multiple barriers to employment and realise their full potential”

Demonstrate how the proposal will reconcile a commitment to social inclusion with a focus on improving the competitiveness and economic performance of the locality.

Outline how it will reduce inequalities between the least advantaged communities and the rest of society.

Outline how the proposal will overcome any potential barriers to access to participation and how policies in place will make a positive difference.

Social enterprises focus is on social and environmental change, led by the values and equality, inclusiveness and putting people and planet first. Social enterprises play an important role in the economic vitality of the Highlands and Islands, particularly in remote and rural areas where smaller populations and smaller customer bases make provision of some services expensive for the public sector and unprofitable for the private sector. They frequently provide employment in remote areas and can also provide opportunities for young people to stay and work, helping to secure the economic future of the area. This project will increase the capacity and effectiveness of social enterprises that have a direct impact on the sustainability of communities.

A key social impact going forward will be enhanced Third Sector capacity, leading to greater community confidence and levels of self-determination, leading in turn to overall enhanced community resilience.

Action plan to address inequality and socio-economic disadvantage

Title of the proposal assessed: Board Healthcheck, Skills and Training

Financial and resource allocation decisions must take into account potential equality impact and, for strategic decisions, socio-economic impact. Proposals which include procurement activity at OJEU level must consider whether to include contract award or performance criteria related to equality. We also recommend this as good practice for lower value contracts.

The following summarises actions to be taken as a result of People Impact Assessment and should be submitted with relevant approval papers.

Summary of impact identified and action to be taken to ensure inequalities and socio-economic disadvantage are addressed			
Potential impact to be addressed	Action to be taken	By whom	When
Learning that is equally accessible will enable the boards to operate in a more cohesive and 'business like' manner. Stable social enterprises enhance community cohesion and will generate positive outcomes for those who are currently disadvantaged.	Provide workshops that are locally delivered at flexible times.	Supplier as a requirement of the contract	April 2019
	Provide webinars that will be delivered at flexible times.	Supplier as a requirement of the contract	April 2019
Knowledge on whether the project is meeting the needs of the full range of people who could benefit from it.	Provide digitally training that can be accessed at the trainee's convenience.	Supplier as a requirement of the contract	April 2019
	Ensure the content presentation of the training and resources are available to meet disability needs	Supplier as a requirement of the contract	April 2019
	Provide a monitoring platform to record the range of people accessing the project.	Supplier as a requirement of the contract	April 2019

Arrangements to monitor and review impact over time		
Monitoring and review arrangements	By whom	When
The data from the supplier platform monitoring the range of people participating in the project at each stages of the training engagement will be accessible by HIE throughout the contract.	Supplier	Ongoing

Procurement

Proposal involves procurement activity at OJEU level

No

Award criteria to be included in tender

Tenders will include an explanation of how the product elements will be managed and delivered, meeting all the accessibility criteria described in the Scope of Services, across the HIE geographically disperse area.

How criteria will be evaluated

The supplier proposals will be evaluated against the award criteria using a 70/30 Quality Cost ratio. The management and delivery will be evaluated in an ongoing manner by account managers who work closely with our clients.

The tender will provide details of the platform the supplier will use and how it will collect and collate all the monitoring information.

A digital board transformation team member will advise on the technical issues involved with the provision of the platform

Contract performance criteria

KPIs on performance will be part of the contract.

How delivery of performance criteria will be monitored

The contract manager will monitor the supplier performance against the KPIs on quarterly basis.

Client board data and training participation data collection

The data from the platform will be evaluated on quarterly basis, with adjustments to the management and delivery from any learning, being part of the contract.

The full signed assessment is held with proposal papers and published on the HIE website.

Senior Responsible Officer (name):

Anne MacDonald

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Job Title:	Head of Social Enterprise Development
Date of signing off completed assessment:	<i>Anne MacDonald 20/3/19</i>

