



Stage 1 – Equality Impact Assessment Screening

Any new policy, strategy, function, service, practice, or proposal will need to be screened to decide whether it's relevant to equality and if this is the case, it is necessary to build an assessment (Stage 2) into the **initial drafting** or **development** of the piece of work.

The relevant strands of equality are:

Age, Disability, Gender identity/Gender reassignment, Race, Religion or belief, Sex, Sexual orientation, Women who are pregnant or have recently had a baby.

Also, for issues affecting staff, consider employees who are married or in a civil partnership.

The next section sets out the points you may need to consider in determining whether to carry out an EIA (stage 2). For advice/support in making this determination, please contact the Performance & Improvement Team (Equality lead).

Title of policy or proposal	Treasury Strategy Reports 2025/26 - 2028/29
Name of EIA lead	Jayne Dethick
Briefly describe the aims of the policy, strategy, service, decision or proposal, its aims, the likely outcomes, and the rationale for it	Approval of the Council's suite of Treasury Strategies for 2025/26 to 2028/29. These include: <ul style="list-style-type: none"> • Treasury Management Strategy • Capital Strategy • Investment Strategy • Flexible Use of Capital Receipts Strategy

	Initial Assessment Considerations	Yes	No	Comments
1.	Does this policy/proposal affect people: <ul style="list-style-type: none"> • Customers • Residents • Staff 		✓	
2.	Does it have the potential to adversely impact on any of the protected characteristics?		✓	
3.	Can the council influence the impact? E.g., is it a statutory requirement, national guidance etc.		✓	
4.	Are existing equality monitoring processes already in place? If so, please note under comments		✓	

If the answer to questions 1 to 3 above is 'yes', then an **Equality Impact Assessment** (Stage 2) may be necessary.

A copy of the form should be sent via email to the Performance and Improvement (Equality Lead) amar.bashir@ne-derbyshire.gov.uk and a copy should be retained with your policy/proposal documentation.

Equality Officer Recommendation	Tick as appropriate	Date
EIA Stage 2 required		
EIA Stage 2 NOT required	✓	02/01/2024

Copy to be returned to the EIA lead with Equality Officer recommendation.

Performance and Improvement Team to keep a central electronic record of all decisions made under Stage 1.