Transport & Fleet Management Policy

Policy number and category	**CG 15**	**Corporate Governance**
Version number and date	**4**	**January 2023**
Ratifying committee or executive director	**Clinical Governance Committee**	
Date ratified	**January 2023**	
Next anticipated review	**January 2026**	
Executive director	**Executive Director of Operations**	
Policy lead	**Associate Director Estates & Facilities**	
Policy author *(if different from above)*	**Transport & Logistics Manager / Associate Director Urgent & Acute Care**	
Exec Sign off Signature (electronic)		
Disclosable under Freedom of Information	**Yes**	

POLICY CONTEXT

The purpose of this policy is to set out the context for transport and fleet arrangements within the Trust & SSL. In particular, it provides the framework for the efficient and effective management and deployment of 'Trust vehicles' (vehicles owned or leased by the Trust), which complies with legislative requirements.
This policy regulates:

- The management and deployment of vehicles owned or leased by the Trust ('Trust vehicles')
- The management of employees driving Trust vehicles ('Trust vehicle drivers')
- The usage of third-party transport services, made available to the Trust through contract agreements
- This Policy does not Cover Grey Fleet or Employees own means of transport
- This policy does not cover checking of grey fleet vehicles and staff who drive their own vehicles for work
- Policy will be available on Connect under Transport & Fleet

POLICY REQUIREMENT (see Section 2)

This policy sets out responsibilities and procedures for staff in relation to the use of trust fleet vehicles and arrangements for other transport services. By defining the function of the separate transport services and the justified use of them, this policy makes clear the accepted best practice and accepted usage by Trust & SSL staff.

CONTENTS

1 INTRODUCTION

1.1 Rationale

The purpose of this policy is to ensure a consistent approach in the use of Trust & Summerhill Services Limited(SSL) SSL are a wholly owned subsidiary of Birmingham and Solihull Mental Health Foundation Trust ensuring that formal procedures are employed to ensure they are operated safely and effectively. It sets out the roles and responsibilities of those involved in the provision and use of transport.

Birmingham & Solihull Mental Health Foundation Trust & SSL recognises its responsibilities for the health and safety of its employees under the Health & Safety at Work Act 1974 whilst at their place of work and is therefore subject to the current legislation. It follows that the Trust is required to carry out an assessment of the risks to the health and safety of its employees, while they are at work, and to other people who may be affected by their work activities.

Furthermore, under the legal principle of 'Vicarious Liability', the Trust may be jointly liable for any negligent actions or omissions of their employees during the course of their employment to third parties who have sustained a loss or injury through the negligence of a Trust employee.

Employees are driving a trust fleet vehicle 'in the course of their employment' where they have been authorised, implicitly or expressly, by the Trust to carry out Trust business. For example, an employee is driving 'during the course of his/her employment' when driving to a meeting, training session or workplace away from the usual workplace.

1.2 Scope

The Trust operates and makes arrangements for different types of transport, each of which is governed by different legislation and regulations. This document therefore sets the Trust's transport provision in context, providing a comprehensive framework of policies, procedures and protocols.

Transport is important to various elements of Trust's & SSL activities. It is used to move documents, specimens and samples, and other goods between the Trust's units and departments. Transport of patients is an integral part of care services provided. Furthermore, staff need to travel across the Trust's area to deliver vital care services and provide support to patients.

The Trust manages or provides a range of different transport services as follows:

- This policy does not cover Staff driving there own car to and from work or for business usage during working hours. Staff would need to check own vehicles in relation to CAZ, etc and ensure they follow HR guidelines in relation to the payment.

- **Trust & SSL Fleet** – a mix of small, medium and large vans are provided for the SSL Estates & Facilities, Portering, Catering and Trust ICT teams. The fleet also includes some people carriers and a minibus to assist in the transportation of patients. Vehicles are fitted with telematics.

- **General Transport (GT)** –operated by the SSL to carry goods, documents, and specimens between Trust sites. These operate on semi-fixed timetabled schedules, visiting units and departments on varying frequencies. A key part of their role includes but is not limited to delivering pharmacy, bloods and samples

to the pathology department for testing.

- o **Non-Emergency Patient Transport (NEPT)** –operated by SSL, consists of a mixture of wheelchair accessible vehicles (WAV), people carriers (MPVs) and minibuses to transport eligible patients to and from centres, units and hospital for appointments, sessions or activities.

- o **Taxi Services** – the Trust has contracts with particular taxi companies that can be called upon to convey patients and, in certain circumstances, staff or items. This policy refers to taxi procedure in the Trust guideline For taxi usage for both emergency activity and Non-emergency Planned Activity

- o **Secure Patient Transport (SPT)**- Follow local guidelines as advised by Clinical Teams, separate to this policy.

1.3 Principles

Birmingham & Solihull Mental Health Foundation Trust (the Trust) takes the health, safety and welfare of its staff very seriously. It recognises the risks to staff that drive its vehicles and is committed to the prevention of injury, loss of life and damage to property from work-related driving incidents. The purpose of this policy is to enable the Trust to meet its obligation to protect staff as far as is reasonably practicable from occupational road risks associated with work-related driving.

2 Policy

Management Responsibilities

The Executive Director of Resources and the Systems Accountant will provide advice and support about the implementation of this policy.

The Executive Director of Resources will approve the procedures and subsequent amendments and notify the Board of Directors of any serious breaches that contravene the policy and procedures.

The Transport and Logistics Manager will ensure that Trust vehicles are:

- Appropriately licensed and taxed
- Insured for the use they are intended
- Serviced in accordance with the recommendations of the vehicle manufacturer and or Supplier

They will also ensure that appropriate policies and procedures are made available to all relevant parties, and that forms and authorisation protocols are updated to meet changing requirements.

The Transport and Logistics Manager will be responsible for monitoring the policy, compliance with procedures, vehicle purchases or leases, maintenance arrangements, end of lease requirements and fuel card usage.

The Director of Finance is responsible for insurance arrangements and ensuring that a suitable insurance policy is in place.

Service Delivery Managers and Line Managers

Each department that operates Trust vehicles will identify a responsible person

who will oversee vehicle use in that department and liaise closely with the Transport and Logistics Manager.

The responsible person will check the driving license of each driver in their department, in accordance with the License Checking Procedure for DVLA check) and complete the Driver Authorisation Protocol (FMDA). The original of the completed form (FMDA) will be kept in the local personnel file.

The responsible person will include drivers' details on the Site List Authorised Drivers (FMSLAD) and email the list to the Fleet Management Team. At the same time, the responsible person will issue a copy of the Trust wide Driver Protocol (FMDP) to the driver

In addition, the responsible person will assist in:
- Monitoring compliance with this policy and drivers' operating procedures
- Conduct spot checks to ensure the safety and cleanliness of Trust vehicles

Any breaches of the policy, including the misuse of vehicles, should be reported immediately to the Transport & Logistics Manager. Any instances where it is believed fraud or bribery has occurred will be reported to the Local Counter Fraud Specialist as soon as practicable.

Permitted and Prohibited use of Trust Vehicles

Any vehicle owned, leased or hired by the Trust may only be used for the purpose for which it is intended, which is Trust business and may not be used for any other purpose including personal use. Misuse of Trust Vehicles is a disciplinary offence.

In severe weather, the Line Manager and drivers will jointly assess if Trust vehicles should be driven in those conditions, taking account of visible conditions, weather reports and motoring advice issued to the public.

Fleet Management Team

The Fleet Management Team will:

- Assist in reviewing and updating procedures
- Arrange access to recognised driver training as required
- Maintain the database of drivers, vehicles, and documentation
- Facilitate annual and periodic vehicle inspections
- Provide advice and guidance for contract renewals in conjunction with Trust procurement staff
- Provide advice on current legislation and guidance
- Update Trust intranet with approved protocols and documentation relevant to fleet usage

Employees' Responsibilities

Staff must:
- Ensure they notify their manager if any medical conditions change that may affect their driving, this includes if staff do not feel well but have not taken sick leave.
- Before undertaking a journey consider potential hazards, including weather conditions, their own fitness to drive, distance and any other relevant factors. It is their responsibility to tell their manager if they consider driving is hazardous for any reason.

- Ensure the vehicle they will be driving is fit for purpose. They must consider their own fitness to drive and ensure the requirements of the Highway Code and Road Traffic regulations are met.
- Have a full valid license, and provide DVLA check code
- Drivers must be over 25 years of age to be able to driver trust minibus
- Responsible to inform manager if any changes to their driving licence, for example, added points for speeding.

In taking account of these factors, drivers should ensure the following procedures are adhered to:

Driving

- Drivers must read the Trust's 'Drivers' Operating Procedures' document and adhere to its requirements, including the completion of particular forms and presenting documentary evidence as necessary.
- Complete the Daily Driver Check Sheet and report any defects
- Vehicles must be driven safely at all times and in accordance with all relevant Road Traffic laws and regulations, taking account of speed limits and other statutory requirements. Drivers will be responsible for any offences committed.
- Drivers must not arrive on duty or drive whilst under the influence of alcohol or any other substances. Equally, the consumption of alcohol or other substances of misuse is prohibited while on duty or during any recognised break.
- Seatbelts must be worn at all times whilst travelling in any vehicle
- Mobile phones must not be used when driving.
- No smoking in any vehicle
- Drivers responsible for any fines, parking, bus lane, speeding, whilst they are in charge of the vehicle and therefore the Trust will not be held accountable for these.
- Fleet vehicles are Clean Air Zone (CAZ) compliant
- Vehicles must not be left unattended with the engine idling.
- Staff must not sit in the vehicle with the engine idling for a prolonged period of time.

Maintenance
- Ensure that the daily driver's check Fleet Management Vehicle Check (FMVC) is conducted on the vehicle and complete and sign the checklist, returning it to your supervisor.
- Report defects immediately to your supervisor. Drivers are responsible for the vehicle they are driving at any time and for its condition.

Fueling
- Check and identify whether the vehicle use diesel or petrol before fueling and ensure that the correct fuel is used.
- Prior to fueling, check that the fuel card will be accepted at the filling station.
- Fuel card receipts should be scanned and emailed to the Fleet Management Team, along with the monthly Vehicle Check Sheet Fleet Management Vehicle Check (FMVC)
- Staff must not use Fuel cards for personal use, these are only prohibited for the use of re-fueling the Trust's transport vehicles. Any misuse of fuel cars will be reported to the Local Counter Fraud Specialist and manage accordingly.

Permitted and Prohibited use of Trust Vehicles

- Any vehicle owned, leased or hired by the Trust may only be used for the purpose for which it is intended, which is Trust business and may not be used for any other purpose including personal use. Misuse of Trust Vehicles is a disciplinary offence.

- In severe weather, the Line Manager and drivers will jointly assess if Trust vehicles should be driven in those conditions, taking account of visible conditions, weather reports and motoring advice issued to the public.

Parking
- Always park correctly; do not park in prohibited areas. Drivers will themselves be responsible for any parking tickets issued. Never park in disabled parking bays unless you hold a disabled parking badge or park in areas designated for emergency vehicles.

Security
- When leaving a vehicle, ensure that all equipment and materials are secure and out of sight. Ensure that all doors are locked, and windows closed whenever the vehicle is left unattended.
- No items to be carried in the driver or passenger compartment

Business Travel
- The vehicle should only be used for authorised Trust business travel purposes and to carry authorised passengers and/or goods.
- CAZ

Record keeping
- Drivers should undertake a visual vehicle check each day and complete the checklist. A Vehicle Daily Check Sheet (FMVC) should be completed each day, recording journeys and mileage.

Taking Trust vehicles home

Where a vehicle is taken home (home-base-home travel) this should be authorised in advance by completing a Take Vehicle Home form Fleet Management Vehicle Home (FMVH). A copy of this will be kept in the driver's personnel file, with further copies provided to the Fleet Management Team (by email) and to Finance.

Unless otherwise authorised home-base-home travel should be outside of normal working hours. The vehicle should only be used for travel between home and base. It should not be used for any other personal use, for example, private work. Neither should any unauthorized passengers be carried. Any other personal use will not be covered by the Trust's insurance, such that drivers will be personally responsible for any damage that occurs

Journeys between work and home should be recorded separately on the Vehicle Log Sheet, including mileage.

In the event of becoming unwell whilst at work contact your supervisor and agree whether the vehicle can be taken home or is required to be left at base. If the vehicle is to be left at base arrangements will be made to take you home.

In the event of absence from work, which may exceed three working days, contact

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your manager to see whether the vehicle should be collected.

In the event of any planned leave of 5 days or more, the vehicle should be securely parked at a Trust site.

Regardless of the above, if necessary, during any period of absence or leave from work your vehicle may be recovered at any time. If your vehicle is collected, a note will be left advising you that this has happened. In the event of being without a vehicle, it is the responsibility of the individual to arrange transport to and from their work base.

3 PROCEDURE

There is a single point of contact for all Trust transport enquiries and bookings. In contacting 2244, a choice of 4 options will be offered:

1 Non-Emergency Patient Transport
2 Taxi
3 Secure Patient Transport
4 Other Transport Services

General Transport (GT) - courier van transport

The Trust operates its own fleet of vans to provide an efficient and effective means of moving items between departments and units. SSL provide the staffing to fulfill the service, it is designed to be fully integrated with all aspects of the Trust's operations, supporting the needs of departments.

The service operates Monday to Friday between 07:00 and 20:00. Vans operate to set schedules, calling at different departments and units with varying frequencies, according to needs and demands. Each department is made aware of pick-up times and details are available on the Trust's intranet. Items can be sent between any of the Trust's departments and will be delivered within one working day.

The Trust's policy is for the internal movement of all items (post, medical records, blood, specimens, and samples) to be via the general transport service. If there is a need to transport an item outside of the general schedule, contact should be made with 2244 to establish whether it is possible to arrange a special pick-up. Only if this is not possible can alternative arrangements be made using the taxi booking procedure.

The general transport service is managed by the Senior Transport & Logistics Manager. For information and enquiries contact 2244 or e-mail **bsmhft.neptgtbooking@nhs.net**

Non-Emergency Patient Transport (NEPT)

The Trust operates its own fleet of people carriers and minibuses to convey eligible patients between home and centers, units or hospital for sessions or appointments, or to transfer patients between units. NEPT is purely a transport service, not a care service. Vehicles only have a driver; there is no passenger assistant provided. If a patient needs to be accompanied by a friend, relative or carer, then they will be accommodated in the vehicle if possible. As an in-house service, it is designed to be fully integrated with all aspects of the Trust's operation, supporting its various activities. Refer to. Trust guideline For taxi usage for both emergency activity and Non-emergency Planned Activity

The service operates Monday – Friday between 07:15 and17:45. outside of these times the phone lines are transferred to the trust Taxi provider, including weekends and Bank Holidays.

The NEPT service is managed by the Senior Transport & Logistics Manager. For information, enquiries and bookings contact 2244 or e-mail bsmhft.neptgtbooking@nhs.net

Transport by Taxi

At times where General Transport GT or NEPT is not available, then it will be necessary to arrange a taxi to convey a patient or items. The Trust has a call-off contract, with pre-determined rates, with a taxi operator that has demonstrated it can meet the Trust's requirements and quality standards. Bookings for taxis should be made in accordance with the procedures set out in Procedure for Taxi Usage for Both Non-Emergency & Planned Activity

4 RESPONSIBILITIES

A summary of responsibilities is given as follows:

Post(s)	Responsibilities
All staff (including SSL, bank, agency, fixed term, and volunteers)	All staff have a duty to be aware and abide by this Trust wide policy and complete relevant protocols and documents prior to driving Trust vehicles.
Service, clinical, and corporate directors	Provide assurance and support to management to ensure that this policy is adhered to and that where necessary training is provided.
Policy lead	Will implement a robust fleet monitoring and management system, to ensure the safety of staff, clients and the general public, with clearly defined responsibilities and incorporating audit processes to ensure clear accountability for process compliance.
Associate Director of Estates & Facilities	Responsible on behalf of the Trust Board to ensure that this policy and its requirements are adhered to.
Executive Director of Resources and the Systems Accountant	Responsible on behalf of the Trust Board to ensure that this policy and its requirements are adhered to.
Trust Fleet Monitoring Team	Transport & Logistics Manager will annually audit records held and report to the Associate Director of Estates and Facilities. Regular on-site monitoring of vehicles and documents.

5   DEVELOPMENT AND CONSULTATION PROCESS

Consultation summary		
Date policy issued for consultation		Nov 2022
Number of versions produced for consultation		1
Committees or meetings where this policy was formally discussed		
Legal Department		
Facilities Department		
Where else presented	**Summary of feedback**	**Actions / Response**

6   Reference Documents

The documents identified below in are available for download from the Trust intranet pages:- https://bsmhftnhsuk.sharepoint.com/sites/connect-bu-ssl/SitePages/Transport-at-SSL.aspx

Changes to these documents are authorised by agreement of the New Title

Links to these docs are by following the above

Document Name	Reference No
Transport & Fleet Management Policy	CG15
Drivers' Operating Procedures	FMDOP
Cleaning of Vehicles Protocol	FMCV
Driver Authorization Protocol	FMDA
Trust-wide Driver Protocol	FMDP
Insurance Certificate	FMIC
Key Issue Record Document	
Site List Authorized Drivers	FMSLAD
Vehicle Daily Check Sheet Protocol	FMVC
Take Vehicle Home Protocol	FMVH
Vehicle Listing Document	FMVL
Vehicle Ordering Protocol	FMVO

7   BIBLIOGRAPHY

- Health & Safety at Work Act 1974
- HSE - Driving at Work (2003)
- ROSPA - Driving for work - Mobile phones
- Road Traffic Act 1988
- Provision & Use of Work Equipment regulations (PUWER) 1998
- Management of Health & Safety Regulations 1992 (updated 1999)
- Working Time Regulations 2005
- Road Safety Act 2006
- Health and Safety (Offences) Act 2008
- Corporate Manslaughter and Corporate Homicide Act 2008
- Highway Code
- Trust Policy - Use by staff of Mobile Telephones, PDAs & other Handheld Electronic Technology
- C33 Carriage of Pathology Laboratory Specimens Policy
- Trust Occupation Health Lead & Department
- ROSPA - Minibus Safety Code of Practice
- MIDAS

Associated Control Documents
- Trust Incident Reporting Policy
- Policy on the Management of Exposure to Environmental Tobacco Smoke (R&S7)

8   GLOSSARY
None

9   AUDIT AND ASSURANCE

Element to be monitored	Lead	Tool	Freq	Reporting Arrangements
Taxi Service	Clinical & Procurement	Taxi Reports	Monthly	Reports from Taxi provider
Non-Emergency Patient Transport	Associate Director Estates & Facilities	Cleric	Quarterly	Reports From Cleric
General Transport	Associate Director Estates & Facilities	Cleric	Quarterly	Reports From Cleric
Trust SSI Fleet	Associate Director Estates & Facilities	Transport Database	Quarterly	Reports from Database

Fuel	Associate Director Estates & Facilities	On-Line Reporting Tool	Monthly	Reports from Online Portal
Drivers	Associate Director Estates & Facilities	Excel Spreadsheet	Monthly	Report each Month on number of drivers
Insurance	Associate Director Estates & Facilities	Insurance Company	Quarterly	Reports from Insurance Company

Consequences of Failing to Comply

This policy is made available to staff via the intranet therefore it is employees' responsibility to make themselves aware of the processes and procedures within. Failing to comply with this policy may result in dismissal of employee involved or civil or criminal prosecution for the individual or the Trust."

10. APPENDICES

Appendix 1 – Equality Impact Assessment

Equality Analysis Screening Form

A word version of this document can be found on the HR support pages on Connect

http://connect/corporate/humanresources/managementsupport/Pages/default.aspx

Title of Policy	Transport & Fleet Management Policy		
Person Completing this policy	Dave Bell	**Role or title**	Logistics Manager
Division	Estates & Facilities	**Service Area**	Corporate
Date Started	Corporate	**Date completed**	December 2022

Main purpose and aims of the policy and how it fits in with the wider strategic aims and objectives of the organisation.

The purpose of the policy is to promote equality and remove any discrimination to ensure that everyone affected by the contents of this policy can fulfil their full potential within a Trust that is inclusive, compassionate, and committed.

Who will benefit from the policy?

This policy applies to **all** - that is: staff including agency, bank and volunteers, services users and carers, visitors, stakeholders, and any other third-party organisations who work in partnership with the Trust

Does the policy affect service users, employees, or the wider community?

Add any data you have on the groups affected split by Protected characteristic in the boxes below. Highlight how you have used the data to reduce any noted inequalities going forward

This policy applies to all staff including agency, bank and volunteers, vulnerable services users and carers, visitors, stakeholders, and any other third-party organisations who work in partnership with the Trust.

Does the policy significantly affect service delivery, business processes or policy?

How will these reduce inequality?

Will have no impact on current standards or service delivery

Does it involve a significant commitment of resources?

How will these reduce inequality?

This policy does not have any commitment of resources related to it.

Does the policy relate to an area where there are known inequalities? (e.g. seclusion, accessibility, recruitment & progression)

This policy does not have any known inequalities related to it

Impacts on different Personal Protected Characteristics – *Helpful Questions:*

Does this policy promote equality of opportunity?	*Promote good community relations?*
Eliminate discrimination?	*Promote positive attitudes towards disabled people?*
Eliminate harassment?	*Consider more favourable treatment of disabled people?*
Eliminate victimisation?	*Promote involvement and consultation?*
	Protect and promote human rights?

Please click in the relevant impact box and include relevant data

Personal Protected Characteristic	No/Minimum Impact	Negative Impact	Positive Impact	Please list details or evidence of why there might be a positive, negative or no impact on protected characteristics.
Age			x	As part of the Equality Act – Age is a protected characteristic, this is not monitored in terms of EDI, however, is collated through our recruitment process, dependent on individual being open about their age. It is anticipated that age will not have an negative impact in

				terms of discrimination as this policy ensures that all employees should be treated in a fair, reasonable and consistent manner irrespective of their age.
Including children and people over 65 Is it easy for someone of any age to find out about your service or access your policy? Are you able to justify the legal or lawful reasons when your service excludes certain age groups				
Disability			x	WDES Data is showing **5.56%** colleagues across our Trust have long-term condition or illness. Currently we have the Disability and Neuro Diversity Staff Network Group who currently support staff with disability. We also support staff with Reasonable adjustment with the Government 'Access to Work' Grant. Therefore, it is anticipated that disability will not have an negative impact in terms of discrimination as this policy ensures that all employees should be treated in a fair, reasonable and consistent manner irrespective of their disability. This is dependent if the individual feel comfortable about being open about their disability especially where this may be a hidden disability or mental health issues. The current WDES is showing the Trust is ranked in the top 10% nationally in Recruitment and Reporting of harassment, bullying and abuse
Including those with physical or sensory impairments, those with learning disabilities and those with mental health issues Do you currently monitor who has a disability so that you know how well your service is being used by people with a disability? Are you making reasonable adjustment to meet the needs of the staff, service users, carers and families?				
Gender			x	Currently gender is collated and there is a disparity around gender pay gap overall with an increase from 6.99% to 11.17%. It is anticipated that gender will not have an negative impact in terms of discrimination as this policy ensures that all employees should be treated in a fair, reasonable and consistent manner irrespective of their gender identity. The Trust has now set up a Women's Network who will be meeting on a monthly basis
This can include male and female or someone who has completed the gender reassignment process from one sex to another Do you have flexible working arrangements for either sex?				

Is it easier for either men or women to access your policy?				
Marriage or Civil Partnerships			x	Although this is a protected characteristic, this is not recorded. It is anticipated that marriage or civil partnership will not have an negative impact in terms of discrimination as this policy ensures that all employees should be treated in a fair, reasonable and consistent manner irrespective of their marriage or civil partnership. This is dependent on staff feeling comfortable about being open about their Marriage or Civil Partnership
People who are in a Civil Partnerships must be treated equally to married couples on a wide range of legal matters Are the documents and information provided for your service reflecting the appropriate terminology for marriage and civil partnerships?				
Pregnancy or Maternity			x	Although this is a protected characteristic, this is not recorded. It is anticipated that pregnancy and maternity will not have an negative impact in terms of discrimination as this policy ensures that all employees should be treated in a fair, reasonable and consistent manner irrespective of this. However, the Trust will provide necessary support and reasonable adjustment for an employee who is pregnant or on maternity, paternity or adoption leave and this may be pausing the procedure for a temporary time. This is dependent on staff feeling comfortable about being open about their or their partners pregnancy, including miscarriage. We also have started the Women's Network where these matters can be discussed and shared there.
This includes women having a baby and women just after they have had a baby Does your service accommodate the needs of expectant and post-natal mothers both as staff and service users? Can your service treat staff and patients with dignity and respect relation into pregnancy and maternity?				
Race or Ethnicity			x	Our WRES Data is showing our black and minority ethnic workforce representation is 37.6% and in 2022 we showed a small increase on the 37% reported in 2021 (1+ive). There are current workstreams underway highlighting the disparities and the EDI teams are working with specific areas. A new Anti-Racist policy will be created and be aligned to the EDI

				policy as the Trust is working towards a Anti Racist organisation. It is anticipated that Race or Ethnicity will not have an negative impact in terms of discrimination as this policy ensures that all employees should be treated in a fair, reasonable and consistent manner irrespective of this. This is also dependent on staff feeling comfortable about being open about their heritage or refugee status
Including Gypsy or Roma people, Irish people, those of mixed heritage, asylum seekers and refugees What training does staff have to respond to the cultural needs of different ethnic groups? What arrangements are in place to communicate with people who do not have English as a first language?				
Religion or Belief			x	Although this is a protected characteristic, we have some recorded data, and this is subject to staff completing this. The Trust will provide necessary support and reasonable adjustment for an employee and we also have the Spiritual Care Team. It is anticipated that religion or belief will not have an negative impact in terms of discrimination as this policy ensures that all employees should be treated in a fair, reasonable and consistent manner irrespective of this. This is also dependent on staff feeling comfortable about being open about their religion or belief.
Including humanists and non-believers Is there easy access to a prayer or quiet room to your service delivery area? When organising events – Do you take necessary steps to make sure that spiritual requirements are met?				
Sexual Orientation			x	Although this is a protected characteristic, we have some recorded data and this is subject to staff completing this. We currently have LGBTQ Staff Network who meet regularly where information is shared. It is anticipated that sexual orientation will not have an negative impact in terms of discrimination as this policy ensures that all employees should be treated in a fair, reasonable and consistent manner irrespective of this.
Including gay men, lesbians, and bisexual people Does your service use visual images that could be people from any background or are the images mainly heterosexual couples? Does staff in your workplace feel comfortable about being 'out' or would office culture make them feel this might not be a good idea?				

Transgender or Gender Reassignment			x	Although this is a protected characteristic, this is not recorded. It is anticipated that Transgender or Gender Reassignment will not have an negative impact in terms of discrimination as this policy ensures that all employees should be treated in a fair, reasonable and consistent manner irrespective of this. This is also dependent on staff feeling comfortable about being open about their being Transgender or undergoing Gender Reassignment There is also a Trans and Non Binary Policy to support this.
This will include people who are in the process of or in a care pathway changing from one gender to another Have you considered the possible needs of transgender staff and service users in the development of your policy or service?				
Human Rights			x	This policy is written to promote equality and remove any discrimination to ensure that everyone can fulfil their full potential within a Trust that is inclusive, compassionate, and committed. This is keeping in line with our Trust values, the NHS People's Plan commitment to equality, diversity and inclusion and reflects the provisions of the Equality Act 2010. This policy applies to **all**, including applicants applying for a job, staff including agency, bank and volunteers, services users and carers, visitors, stakeholders, an any other third-party organisations who work in partnership with the Trust
Affecting someone's right to Life, Dignity and Respect? Caring for other people or protecting them from danger? The detention of an individual inadvertently or placing someone in a humiliating situation or position?				
If a negative or disproportionate impact has been identified in any of the key areas would this difference be illegal / unlawful? I.e. Would it be discriminatory under anti-discrimination legislation. (The Equality Act 2010, Human Rights Act 1998)				
	Yes	**No**		
	High Impact	**Medium Impact**	**Low Impact**	**No Impact**

What do you consider the level of negative impact to be?			x	

If the impact could be discriminatory in law, please contact the **Equality and Diversity Lead** immediately to determine the next course of action. If the negative impact is high a Full Equality Analysis will be required.

If you are unsure how to answer the above questions, or if you have assessed the impact as medium, please seek further guidance from the **Equality and Diversity Lead** before proceeding.

If the policy does not have a negative impact or the impact is considered low, reasonable, or justifiable, then please complete the rest of the form below with any required redial actions, and forward to the **Equality and Diversity Lead.**

Action Planning:

How could you minimise or remove any negative impact identified even if this is of low significance?

Transport Managers will work with the organisation to reduce impact of any detriment experienced by reports of concerns

How will any impact or planned actions be monitored and reviewed?

Feedback from reporters of concerns, escalating concerns through governance routes. Regular audits and policy updates, communication to managers through Operational Meetings

How will you promote equal opportunity and advance equality by sharing good practice to have a positive impact other people as a result of their personal protected characteristic.

Continued efforts will be provided to promote this policy will continue in ways accessible to ALL staff without the reliance upon electronic communications

Please save and keep one copy and then send a copy with a copy of the policy to the Senior Equality and Diversity Lead at bsmhft.edi.queries@nhs.net. The results will then be published on the Trust's website. Please ensure that any resulting actions are incorporated into Divisional or Service planning and monitored on a regular basis