Transport & Fleet Management Policy

Policy number and category	CG 15	Corporate Governance
Version number and date	5	December 2025
Ratifying committee or executive director	Clinical Governance Committee	
Date ratified	January 2026	
Next anticipated review	January 2029	
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 *of Information Act 2000*	Yes	

POLICY CONTEXT

The purpose of this policy is to set out the context for Transport and Fleet arrangements within the Trust & SSL. 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)
- Checking employees driving Trust vehicles ('Trust vehicle drivers')
- The usage of Trust General transport & Non -Emergency Patient Transport Services
- 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

Change Record

Date	Version	Author (Name & Role)	Reasons for review / Changes incorporated	Ratifying Committee
Sept 2025	**5**	**Dave Bell Logistics Manager**	**Three yearly reviews. Changes to procedures and documents, include driver training, telematics**	**Trust CGC**

1. Introduction

1.1 Rationale

This Policy applies to the Trust Group which for the avoidance of doubt includes all who work for or within Birmingham and Solihull Mental Health NHS Foundation Trust (BSMHFT) and Summerhill Services Ltd (SSL, the Trusts wholly owned subsidiary).

Reference to the 'Trust' within this policy is therefore inclusive of both BSMHFT and SSL unless otherwise specified.

The purpose of the Policy being to support a framework for the management of fleet vehicles to mitigate risks and provide for a safe, compliant, cost effective and robust control system.

The trust 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 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 conduct Trust business. For example, an employee is driving 'during his/her employment, transportation for Service Users 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:

- **Trust 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.

- **Fines-** SSL will monitor incoming fines in relation to Parking, CAZ, Bus Lane, Speeding and forward to appropriate Responsible Person. They will check and make contact with the driver and advise them of the Fine.

- **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 at varying frequencies. A key part of their role includes but is not limited to delivering pharmacy, blood, and samples to the pathology department for testing.

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

- **Staff Driver Licence Checking**- operated by SSL to ensure drivers are on approved Driver List and covered by Trust insurance.

- **Driver Training-**operated by SSL to offer and recommend driver training/ awareness when driving a Trust vehicle. This ensures Driver, passengers are safe during transport.

- **Telematics** - All Trust fleet vehicles are fitted with telematics and front-facing dash cameras. These systems are used to monitor vehicle usage, ensure safety, and support incident investigations. Data collected will be reviewed by the Fleet Management Team and retained in accordance with Trust data protection policies. Staff will be informed of the presence and purpose of these systems during induction and training.

Out of Scope
- **Grey Fleet**- Staff that drive their own vehicle for Trust Business and claim Expenses.

- **Grey Fleet Licence Checking**-This is covered under Expenses policy.

- **Salary Sacrifice Vehicles** – any vehicle leased to individuals via Trust Salary Sacrifice Scheme, Including insurance & Maintenance.

- **Fines -**Any fines incurred by driver of Grey Fleet, Parking, CAZ, Speeding, Bus Lane.

Management of BSMHFT Staff -

- **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.**

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

- **Grey Fleet -** While this policy does not cover Grey Fleet (staff-owned vehicles used for business), staff are reminded that use of personal vehicles for Trust business must comply with the Trust's Expenses Policy. This includes ensuring the vehicle is roadworthy, appropriately insured for business use, and has a valid MOT. Staff are responsible for any incidents or fines incurred while using personal vehicles for work purposes.

1.3 Principles

Trust takes the health, safety, and welfare of its staff very seriously. It recognises the risks to staff that drive fleet 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 it 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 Team 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 authorization protocols are updated to meet changing requirements.

The Transport and Logistics Team 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 ensures 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.

Responsible Person

The responsible person will check the driving licence of each driver in their department, in accordance with the Licence Checking Procedure for DVLA check) and complete the Driver Authorization 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 Authorized 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.
- Liaise with Staff over Driver Training / assessments.
- Return mileage sheets at the end of each month.
- Report vehicle issues to fleet management team.

Any breaches of the policy, including the misuse of vehicles, should be reported immediately to the Transport & Logistics Manager.

Fleet Management Team

The Fleet Management Team will:

- Work with teams to complete vehicle specifications and procure.
- Manage Trust Fleet Insurance, Claims, Drivers.
- Manage Fuel Suppliers.
- Assist in reviewing and updating procedures.
- Provide information on Driver training for SSL & Trust.
- Maintain the database of drivers, vehicles, and documentation.
- Facilitate annual and periodic vehicle inspections.
- Provide advice on current legislation and guidance.
- Update Trust intranet with approved protocols and documentation relevant to fleet usage.

Employees' Responsibilities

Staff must:
- Hold Full Uk Driving Licence and agree to have their Licence checked for a minimum of 12 months with DVLA.
- 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.
- Consider their own fitness to drive and ensure the requirements of the Highway Code and Road Traffic regulations are met.
- Drivers must be over 25 years of age to be able to drive Trust minibuses.
- Responsible for informing managers of 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:

Staff Driving Trust Vehicle(s)
- Staff must ensure they are fit to drive Trust Vehicle
- Staff must read the Trust's 'Drivers' Operating Procedures' document and adhere to its requirements, including the completion of forms and presenting documentary evidence, as necessary.
- Complete the Daily Driver Check Sheet (FMVC)and report any defects.
- Vehicles must be always driven safely and in accordance with all relevant

<aside>Commented [DB1]: Reviewed to Here 25092025</aside>

Road Traffic laws and regulations, taking account of speed limits and other statutory requirements. Drivers will be responsible for any fine's offences committed while in charge of the vehicle.

- Seatbelts must be worn at all times whilst travelling in any vehicle.
- Mobile phones must not be used when driving. Referring to Policy
- No smoking in any vehicle. Refer to policy.
- Drivers are 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 this.
- 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.

Fuel Card &Fueling
- All Vehicles have a fuel card assigned to them.
- Certain teams have bearer fuel cards to be used on any hire vehicle.
- 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 Vehicle Check Sheet Fleet Management Vehicle Check (FMVC)
- Lost Stolen cards reported to fuel company straight away so it can be cancelled, complete eclipse and notify Fleet Management Team so replacement can be ordered.
- 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 managed 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.

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. Refer to Trust Business Continuity Plans and team for updates.

Parking

- Always Park correctly & following the car park rules 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 authorized Trust business travel purposes and to carry authorized passengers and/or goods.

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.

Driving Licence

- Drivers to hold a Full Driving Licence issued in the UK.
- Driver Licence checks are carried out every 12 months.
- Driver to report any changes to their Licence or if Licence is removed, as soon as practically possible.

Medication, Alcohol, Drugs

- 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 recognized break.

Insurance

- Trust vehicles are fully Comprehensive Insurance
- Accidents, incidents are reported to line manager. Complete Trust Accident Form (FMDAC) & sent to Fleet Management Team. Trust Eclipse reporting and where necessary reported through the insurance company.

Vehicles

All vehicles leased by the Trust will be fitted with

- Front Facing Dash Camera.
- Telematics.
- Vehicles will be limited to 62mph.

Taking Trust vehicles home

Where a vehicle is taken home (home-base-home travel) this should be authorized 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 authorized, home-based 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 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

Operational for booking of Patient, Staff Journeys

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 bus stops, 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 48 hours excluding weekends and bank holidays.

The Trust's policy is for the internal movement of all items (post, medical records, blood, specimens, and samples) to be via the GT service. If there is a need to transport an item outside of the GT schedule, contact should be made with Transport Schedules 2244 to establish whether it is possible to arrange a special pick-up.

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 GT & 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

Post(s)	Responsibilities
All Trust staff (including, bank, agency, fixed term, and volunteers)	All staff have a duty to be aware of 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 is 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 Regular on-site monitoring of vehicles and documents.

5   DEVELOPMENT AND CONSULTATION PROCESS

Consultation summary	
Date policy issued for consultation	October 2025
Number of versions produced for consultation	1
Committees or meetings where this policy was formally discussed	

Where else presented	Summary of feedback	Actions / Response

6   Reference Documents

Fleet related documents are available for download from the Trust intranet pages:
-
Transport & Warehouse Services at SSL
Changes to these documents are authorized by agreement of the New Title
Links to these docs are by following the above

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
- ROSPA - Minibus Safety Code of Practice
- MIDAS

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

8   GLOSSARY
None

9   AUDIT AND ASSURANCE

Element to be monitored	Lead	Tool	Frequency	Reporting Committee
Non-Emergency Patient Transport Aborted cancelled completed jobs. Job satisfaction. Staff usage, Journeys given to Trust Taxi provider	Associate Director Estates & Facilities	Cleric	Quarterly	SSL Operational Board, Trust Executive, Trust OMT, Trust FPP (at Direction of Trust SRO)
General Transport. Measured against the bus stops to ensure they are adhered to. Also to ensure what is collected is correctly packaged & labelled	Associate Director Estates & Facilities	Pod Father	Quarterly	SSL Operational Board, Trust Executive, Trust OMT, Trust FPP (at Direction of Trust SRO)

Trust Fleet Fleet Management will ensure for the life of the vehicle, they have Tax, MOT, Serviced, Insured, maintained in line with DY8 4BPehilce service booklets. Responsible person(s) manage vehicle locally and ensure drivers adhere to guidelines, vehicle checked monthly and defects reported	Associate Director Estates & Facilities	Transport Database	Quarterly	SSL Operational Board, Trust Executive, Trust OMT, Trust FPP (at Direction of Trust SRO)
Fuel Manage and monitor fuel spend against vehicle mileage. challenge why high-performance fuels used, why are certain garages used	Associate Director Estates & Facilities	On-Line Reporting Tool	Quarterly	SSL Operational Board, Trust Executive, Trust OMT, Trust FPP (at Direction of Trust SRO)
Drivers Report each Month on number of drivers. Driver added, drivers removed, random driver Licence check	Associate Director Estates & Facilities	Excel Spreadsheet	Quarterly	SSL Operational Board, Trust Executive, Trust OMT, Trust FPP (at Direction of Trust SRO)
Insurance Reports from Insurance Company, identifying no of claims made, progress of claims and outcomes, including repair cost and costs paid out by insurance company.	Associate Director Estates & Facilities	Insurance Company/	Quarterly	SSL Operational Board, Trust Executive, Trust OMT, Trust FPP (at Direction of Trust SRO)
Driver/Vehice Incident Any damage to vehicle, parking issues, driver related issued reported and monitored	Associate Director Estates & Facilities	Eclipse	Quarterly	SSL Operational Board, Trust Executive, Trust OMT, Trust FPP (at Direction of Trust SRO)

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	October 2025	**Date completed**	October 2025

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			It is anticipated that age will not have a 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 sixty-five 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			It is anticipated that disability will not have a 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.
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			It is anticipated that gender will not have a 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.
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			It is anticipated that marital status will not have a 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 marital status.
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			It is anticipated that pregnancy or maternity will not have a 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 pregnancy or maternity.
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			It is anticipated that race or ethnicity will not have a 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 race or ethnicity.
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			It is anticipated that religious beliefs will not have a 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 religious beliefs.
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			It is anticipated that sexual orientation will not have a 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 sexual orientation.
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			It is anticipated that transgender or gender reassignment will not have a 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 transgender or gender reassignment status.
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, or any other third-party organisations who work in partnership with the Trust EDI Leads will work with the organisation to reduce impact of any detriment experienced by reports of concerns.

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**		
What do you consider the level of negative impact to be?	**High Impact**	**Medium Impact**	**Low Impact**	**No Impact**
				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	