



Equality Impact Assessment

The purpose of an Equality Impact Assessment (EqIA) is to improve the work of Orkney Islands Council by making sure it promotes equality and does not discriminate. This assessment records the likely impact of any changes to a function, policy or plan by anticipating the consequences, and making sure that any negative impacts are eliminated or minimised and positive impacts are maximised.

1. Identification of Function, Policy or Plan	
Name of function / policy / plan to be assessed.	Treasury Management Strategy Statement and Annual Investment Strategy 2018-19
Service / service area responsible.	Chief Executive's – Finance Service
Name of person carrying out the assessment and contact details.	Colin Kemp, Corporate Finance Senior Manager
Date of assessment.	01.02.18
Is the function / policy / plan new or existing? (Please indicate also if the service is to be deleted, reduced or changed significantly).	Update of existing annual strategy document

2. Initial Screening	
What are the intended outcomes of the function / policy / plan?	Approve the Council's treasury strategy, including cash flow management, capital financing and investment activities for financial year 2018/19
State who is, or may be affected by this function / policy / plan, and how.	The annual strategy sets out the parameters within which the Council is authorised to operate in managing the Council's short and long term cashflows, and including all investing and financing activities. It is considered that the efficient operation of the treasury management function, along with use a range of permitted investments and prudent borrowing limits all contribute towards the way Council Services are funded.


How have stakeholders been involved in the development of this function / policy / plan?	Annual revenue budget setting process, setting 5 year capital programme and review of investment strategy for Strategic Reserve Fund
Is there any existing data and / or research relating to equalities issues in this policy area? Please summarise. E.g. consultations, national surveys, performance data, complaints, service user feedback, academic / consultants' reports, benchmarking (see equalities resources on OIC information portal).	No
Could the function / policy have a differential impact on any of the following equality strands?	(Please provide any evidence – positive impacts / benefits, negative impacts and reasons).
1. Race: this includes ethnic or national groups, colour and nationality.	No.
2. Sex: a man or a woman.	No.
3. Sexual Orientation: whether a person's sexual attraction is towards their own sex, the opposite sex or to both sexes.	No.
4. Gender Reassignment: the process of transitioning from one gender to another.	No.
5. Pregnancy and maternity.	No.
6. Age: people of different ages.	No.
7. Religion or beliefs or none (atheists).	No.
8. Caring responsibilities.	No.
9. Marriage and Civil Partnerships.	No.
10. Disability: people with disabilities (whether registered or not).	No.

3. Impact Assessment

Does the analysis above identify any differential impacts which need to be addressed?	No.
How could you minimise or remove any potential negative impacts?	N/A
Do you have enough information to make a judgement? If no, what information do you require?	Yes.

4. Conclusions and Planned Action

Is further work required?	No.
What action is to be taken?	None.
Who will undertake it?	N/A
When will it be done?	N/A
How will it be monitored? (e.g. through service plans).	N/A

Signature: 

Name: COLIN KEMP

Date: 01.02.18

(BLOCK CAPITALS).

Please sign and date this form, keep one copy and send a copy to HR and Performance. A Word version should also be emailed to HR and Performance at hrsupport@orkney.gov.uk