

## Form 1: Preparation

---

To complete this form, refer to Guidance set out on Page 20 of the Toolkit

1.	<b>What are you equality impact assessing?</b>	All Wales Menopause Policy
2.	<b>Policy Aims and Brief Description</b>	<p>To make managers aware of the organisational responsibility to understand the menopause and related issues and how they can affect staff, their partners, families and work colleagues.</p> <p>To raise wider awareness and understanding among employees and to outline support and reasonable adjustments that are available.</p> <p>To ensure individuals are treated fairly and with dignity and respect in their working environment and ensure the health, safety and wellbeing of the workforce.</p>
3.	<b>Who is responsible for the Policy/work?</b>	NHS organisations
4.	<b>Who is Involved in undertaking this EqIA?</b>	Menopause Policy Working Group
5.	<b>Is the Policy related to other Policies/areas of work?</b>	Equality, Sickness, Disciplinary, Capability, Grievance and Dignity at Work Policies. Codes of Conduct of Professional/Regulatory Bodies

6.	<b>Stakeholders</b>	<ul style="list-style-type: none"> <li>• Managers</li> <li>• Staff</li> <li>• Patients</li> <li>• Occupational Health</li> </ul>
7.	<b>What might help/hinder the success of the Policy?</b>	<p><b>Factors that may hinder:</b></p> <p>Lack of leadership and commitment at Board level  Lack of awareness and understanding by managers and  Lack of confidence/ability to speak out when affected by menopause  Unwillingness to listen</p> <p><b>Factors that may help:</b></p> <p>Positive attitude at all levels of the organisation  Development of understanding and awareness through supporting Menopause Toolkit  Risk Assessments  All Wales implementation plan to ensure delivery of policy objectives and good employment practice</p>

Form 2 : Information Gathering✓

	Race	Disability	Gender	Gender Reassign	Sexual Orientation	Age	Maternity and pregnancy	Religion Belief	Marriage and Civil Pship	Welsh Language
Is the policy relevant to the public specific duties relating to each equality strand? Tick as appropriate	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
In other words, should the Policy:	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
<ul style="list-style-type: none"> <li>eliminate discrimination and eliminate harassment in relation to:</li> </ul>	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
<ul style="list-style-type: none"> <li>promote equality of opportunity in relation to:</li> </ul>	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
<ul style="list-style-type: none"> <li>promote good relationships and positive attitudes in relation to:</li> </ul>	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
<ul style="list-style-type: none"> <li>encourage participation in public life in relation to:</li> </ul>	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
In relation to disability only, should the Policy take account of difference, even if it involves treating some individuals more favourably?	N	✓								

The Human Rights Act contains 15 rights, all of which NHS organisations have a duty to act compatibly with and to respect, protect and fulfil. The 6 rights that are particularly relevant to healthcare are listed below. For a fuller explanation of these rights and other rights in the Human Rights Act please refer to **Appendix A: The Legislative Framework**.

Depending on the Policy you are considering, you may find the examples below helpful in relation to the Articles.

	Yes	No
<b>Consider, is the Policy relevant to:</b>		
<b>Article 2 : The right to life</b> <b>Examples:</b> The protection and promotion of the safety and welfare of patients and staff; issues of patient restraint and control	By contributing to a positive working environment, with the best possible working conditions for our staff, this policy helps enable them to deliver the highest standards of patient care	
<b>Article 3 : The right not be tortured or treated in an inhuman or degrading way</b> <b>Examples:</b> Issues of dignity and privacy; the protection and promotion of the safety and welfare of patients and staff; the treatment of vulnerable groups or groups that may experience social exclusion, for example, gypsies and travellers; Issues of patient restraint and control	Issues of dignity and respect (by tackling the idea of menopause being a taboo subject and encouraging our workforce to talk openly about their experiences and offering support as appropriate)	
<b>Article 5 : The right to liberty</b> <b>Examples:</b> Issues of patient choice,	By recognising that experiencing the menopause can effect an individuals confidence and by enabling our staff to speak out about the experiences and	

<p>control, empowerment and independence; issues of patient restraint and control</p>	<p>providing appropriate support we seek to empower them</p>	
<p><b>Article 6 : The right to a fair trial</b>  <b>Example:</b> issues of patient choice, control, empowerment and independence</p>	<p>This policy is relevant as it recognises that menopause can have an impact on e.g. concentration and may therefore be a mitigating factor when there are issues around performance and capability</p>	
<p><b>Article 8 : The right to respect for private and family life, home and correspondence; Issues of patient restraint and control</b>  <b>Examples:</b> Issues of dignity and privacy; the protection and promotion of the safety and welfare of patients and staff; the treatment of vulnerable groups or groups that may experience social exclusion, for example, gypsies and travellers; the right of a patient or employee to enjoy their family and/or private life</p>	<p>Impact on family life – for example individuals can be indirectly affected by the menopause e.g. if their partner is experiencing insomnia and night sweats they may also experience disrupted sleep and fatigue or if their partner experiences significant physical or psychological symptoms (such as depression) they may be concerned for her wellbeing and feel increased levels of stress. In some cases people can experience relationship problems or difficulties at home at this time.</p> <p>Issues of dignity and privacy, for example, confidentiality issues if an individual does not want colleagues to know that they are experiencing the menopause or that it is affecting them in a particular way. There may also be issues for transgender staff who are experiencing the menopause but have not told their manager or colleagues that they were assigned a different gender at birth</p>	
<p><b>Article 11 : The right to freedom of thought, conscience and religion</b>  <b>Examples:</b> The protection and promotion of the safety and welfare of patients and staff; the treatment of vulnerable groups or groups that may experience social exclusion, for example, gypsies and travellers</p>	<p>Issues of respect for and knowledge about different religious beliefs and cultural values. It is important to understand that not all religious and cultural groups have the same approach or attitude toward the menopause</p>	

Equality Strand	Information Gathered
<b>Race</b>	<a href="#">The Menopause in the Workplace: A toolkit for trade unionists, Wales TUC Cymru</a> <a href="#">Race, ethnicity may affect how women experience menopause</a> <a href="https://womeninbalance.org/2014/09/17/menopause-around-the-world/">https://womeninbalance.org/2014/09/17/menopause-around-the-world/</a>
<b>Disability</b>	<a href="#">The Menopause in the Workplace: A toolkit for trade unionists, Wales TUC Cymru</a> <a href="#">NHS Guidance – Menopause</a> <a href="#">Davies v Scottish Court and Tribunal Service (SCTS)</a> <a href="#">It's time to mention the menopause (employ law)</a> <a href="#">Guidance on Workforce Wellbeing and the Management Of Sickness Absence, Nottingham Healthcare NHS Foundation Trust</a>
<b>Gender</b>	<a href="#">The Menopause in the Workplace: A toolkit for trade unionists, Wales TUC Cymru</a> <a href="#">Women's experiences of Working Through the Menopause, University of Nottingham</a> <a href="#">Merchant vs BT plc</a> <a href="#">NHS Guidance – Menopause</a> <a href="#">NHS Guidance – Male Menopause</a> <a href="#">Menopause transition: effects on women's economic participation</a> <a href="#">The Telegraph Lifestyle: Woman - How to handle the menopause at work</a>
<b>Gender Reassignment</b>	<a href="#">The Menopause in the Workplace: A toolkit for trade unionists, Wales TUC Cymru</a> <a href="#">If I'm Transgender, Do I Go Through Menopause?</a>
<b>Sexual Orientation</b>	<a href="#">The Menopause in the Workplace: A toolkit for trade unionists, Wales TUC Cymru</a>
<b>Age</b>	<a href="#">The Menopause in the Workplace: A toolkit for trade unionists, Wales TUC Cymru</a> <a href="#">NHS Guidance – early menopause</a> <a href="#">A New Vision for Older Workers: Retain, Retrain, Recruit - Report to Government by Dr Ros Altmann CBE</a> <a href="#">Business Champion for Older Workers</a> <a href="#">The Five Ages of Menopause</a>
<b>Maternity and Pregnancy</b>	<a href="#">Can you get pregnant after menopause?</a>

<b>Religion or Belief</b>	<a href="https://www.researchgate.net/publication/26704699/download">https://www.researchgate.net/publication/26704699/download</a> <a href="https://www.reuters.com/article/us-health-menopause-perceptions/culture-may-influence-how-women-experience-menopause-idUSKBN0OL1XH20150605">https://www.reuters.com/article/us-health-menopause-perceptions/culture-may-influence-how-women-experience-menopause-idUSKBN0OL1XH20150605</a> <a href="https://womeninbalance.org/2014/09/17/menopause-around-the-world/">https://womeninbalance.org/2014/09/17/menopause-around-the-world/</a>
<b>Marriage and Civil Partnership</b>	Menopause Matters: <a href="#">Ending A Marriage During Menopause: Why It May Not Be A Good Idea</a>
<b>Welsh Language</b>	No information has been sourced, however, anecdotally we know that at times of stress individuals may prefer to use their first language. There are possible implications for Welsh speaking members of staff who wish to have these conversations in Welsh.
<b>Human Rights</b>	<p><b>General</b></p> <p>There are gaps in workforce equality monitoring data across all of the protected characteristics. Disaggregated workforce monitoring data is required to inform future policy review and assessment.</p>

**Form 3 : Assessment of Relevance and Priority**

<b>Equality Strand</b>	<b>Evidence: Existing Information to suggest some groups affected. Gathered from Step 2. (See Scoring Chart A)</b>	<b>Potential Impact: Nature, profile, scale, cost, numbers affected, significance. Insert one overall score (See Scoring Chart B)</b>	<b>Decision: Multiply 'evidence' score by 'potential impact' score. (See Scoring Chart C)</b>
<b>Race</b>	<b>2</b>	<b>+2</b>	<b>4</b>
<b>Disability</b>	<b>2</b>	<b>+2</b>	<b>4</b>
<b>Gender</b>	<b>3</b>	<b>+3</b>	<b>9</b>
<b>Gender reassignment</b>	<b>2</b>	<b>+2</b>	<b>4</b>
<b>Sexual Orientation</b>	<b>2</b>	<b>+2</b>	<b>4</b>
<b>Age</b>	<b>3</b>	<b>+3</b>	<b>9</b>
<b>Religion or Belief</b>	<b>2</b>	<b>+1</b>	<b>2</b>
<b>Maternity and Pregnancy</b>	<b>2</b>	<b>+1</b>	<b>2</b>
<b>Marriage and Civil Partnership</b>	<b>2</b>	<b>+1</b>	<b>2</b>
<b>Welsh Language</b>	<b>2</b>	<b>+1</b>	<b>2</b>
<b>Human Rights</b>	<b>2</b>	<b>+3</b>	<b>6</b>

**Scoring Chart A: Evidence Available**

3	Existing data/research
2	Anecdotal/awareness data only
1	No evidence or suggestion

**Scoring Chart B: Potential Impact**

-3	High negative
-2	Medium negative
-1	Low negative
0	No impact
+1	Low positive
+2	Medium positive
+3	High positive

**Scoring Chart C: Impact Decision**

-6 to -9	High Impact (H)
-3 to -5	Medium Impact (M)
-1 to -2	Low Impact (L)
0	No Impact (N)
1 to 9	Positive Impact (P)



**Form 7 : Outcome Report**

---

<b>Organisation:</b>	Welsh Assembly Government/NHS Wales/Trade Unions
----------------------	--

<b>Proposal Sponsored by:</b>	<b>Name:</b>	
	<b>Title:</b>	Joint Chairs
	<b>Department:</b>	Wales Partnership Forum

<b>Policy Title:</b>	All Wales Menopause Policy
----------------------	----------------------------

<b>Brief Aims and Objectives of Policy:</b>	<p>To make managers aware of the organisational responsibility to understand the menopause and related issues and how they can affect staff, their partners, families and work colleagues.</p> <p>To raise wider awareness and understanding among employees and to outline support and reasonable adjustments that are available.</p> <p>To ensure individuals are treated fairly and with dignity and respect in their working environment and ensure the health, safety and wellbeing of the workforce.</p>
---	--

<b>Was the decision reached to proceed to full Equality Impact Assessment?:</b>	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
	<p><b>Record Reasons for Decision:</b></p> <p>The principles and values of the policy are grounded in the promotion of fair and equal treatment. The supporting toolkit will ensure that managers have sufficient information/support to enable them to apply the provisions of the policy fairly and equally – this will be issued to organisations for implementation locally</p>	

<b>If no, are there any issues to be addressed?</b>	<b>Yes ✓</b>	<b>No □</b>
	<p>Record Details:</p> <p>Lack of robust workforce monitoring data to be addressed through all Wales action plan and local implementation. Action will be taken to ensure data gaps are addressed through Workforce Information Systems Programme and Electronic Staff Record (ESR).</p> <p>The issue of recording menopause related sickness absence (ie should it be recorded as an ongoing issue, rather than individual absences) needs to be addressed – it is recommended that this is considered by the All-Wales Managing Attendance at Work Policy Group or the Welsh Partnership Forum Business Committee.</p>	

<b>Is the Policy Lawful?</b>	<b>Yes ✓</b>	<b>No □</b>
------------------------------	--------------	-------------

<b>Will the Policy be adopted?</b>	<b>Yes ✓</b>	<b>No □</b>
	<p><b>If no, please record the reason and any further action required:</b></p>	

<b>Are monitoring arrangements in place?</b>	<b>Yes ✓</b>	<b>No □</b>
	<p><b>Refer to Action Plan (Form 8)</b></p> <p>Monitoring arrangements will be addressed through local application of all Wales action plan. Scrutiny and review of monitoring reports should be undertaken at regular intervals by the Welsh Partnership Forum.</p>	

---

<b>Who is the Lead Officer?</b>	<b>Name:</b>	
	<b>Title:</b>	
	<b>Department:</b>	
<b>Review Date of Policy:</b>		

<b>Signature of all parties:</b>	<b>Name</b>	<b>Title</b>	<b>Signature</b>
	Andrew Davies		
	Rachel Pressley		
	Vicky Richards		
	Angela Lloyd		
	Nicola Bevan		
	Peta Beynon		
	Ruth Jones		

**Please Note: An Action Plan should be attached to this Outcome Report prior to signature**

## Form 8: Action Plan for Menopause Policy

	<b>ACTION</b>	<b>WHO</b>	<b>HOW/ WHEN</b>
Action to address issues highlighted by EqIA process to date	Development of a supporting toolkit (to include section on protected characteristics)	Menopause Policy Working Group	To be shared with organisations for local implementation on approval of policy
During consultation additional evidence was provided around religion and belief, marriage and civil partnership and Welsh language	To be built into EQIA and, if appropriate, the toolkit and Policy	Menopause Policy Working Group	Complete
Absences due to the menopause	It should be made clear that all absences due to the menopause need to be managed in line with the Managing Attendance Policy	Menopause Policy Working Group	Complete – this point has been emphasised throughout the toolkit which accompanies the Policy.
Individuality and individual experiences	To meet the aim of raising awareness, increasing understanding and creating support for individual, it needs to be made very clear that not all individuals experience the menopause in the same way and that some individuals may have more than one protected characteristic.	Menopause Policy Working Group	Complete – this point has been emphasised throughout the toolkit which accompanies the Policy.
Welsh Language	There is an expectation that managers will work closely with their staff to ensure that their communication needs are met	Local organisations	As part of ongoing implementation of the policy

<b>Monitoring Arrangements</b>			
How will the Policy be monitored?	Monitoring arrangements will be determined locally.  Monitoring outcomes will be reported to Health Boards	Workforce and OD Directors	ongoing
What monitoring data will be collected?	Local application of policy and procedure disaggregated against each protected equality characteristic, workplace/directorate and staff group.	Workforce and OD Directors	Ongoing
<b>Publishing Arrangements</b>	Policy and EHIA to be published in line with local procedures following organisational adoption of the All Wales Policy	Workforce and OD Directors	On approval of policy
<b>Review Arrangements</b>	EQIA to be reviewed when Policy is reviewed	Welsh Partnership Forum	To be agreed by Welsh Partnership Forum on approval of Policy