NIMDTA
Northern Ireland
Medical & Dental Training Agency

Five Year Review of Equality Scheme

June 2026

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1. Introduction

This paper presents the report on the Five Year Reviews of Equality Scheme undertaken jointly by 10 public authorities.

Health and Social Care (HSC) organisations have committed to reviewing their Equality Scheme under Section 75 of the Northern Ireland Act (1998) every five years. Eleven public authorities collaborate closely on equality matters, supported by the Business Services Organisation (BSO) Equality Unit. Their equality leads meet quarterly at the Equality Forum, convened by the BSO Equality Unit. Ten of these organisations jointly undertook their Five Year Review of Equality Scheme. Further information on their functions is available on their websites below.

- Blood Transfusion Service: https://nibts.hscni.net
- Business Services Organisation: https://bso.hscni.net
- Children's Court Guardian Agency NI: https://childrenscourtguardianagencyni.co.uk
- NI Medical and Dental Training Agency: https://www.nimdta.gov.uk/
- NI Practice and Education Council for Nursing and Midwifery: https://nipec.hscni.net/
- Northern Ireland Social Care Council: https://niscc.info/
- Patient and Client Council: https://pcc-ni.net/
- Public Health Agency: https://www.publichealth.hscni.net/
- Regulation and Quality Improvement Authority: https://www.rqia.org.uk/
- Safeguarding Board for Northern Ireland: https://www.safeguardingni.org/

These organisations completed their last review in June 2021 (in the case of SBNI in September 2023).

The Strategic Planning and Performance Group (SPPG) in the main falls under the Department's Equality Scheme. As SPPG staff are hosted by the BSO and draw on the support provided by the BSO Equality Unit, the SPPG is likewise one of the partner organisations and forms a member of the joint Equality Forum. Through this mechanism, the SPPG likewise shared and took learning from the joint review.

The purpose of the Five Year Review is to take learning by reviewing the way the organisations have implemented Section 75 over the past five years. The review is a process of self-assessment. As specified by Equality Commission guidance[1], it involves looking at what has been achieved, what remains to be done, and lessons learned. The guidance likewise stipulates that the review report should cover how the scheme's implementation has benefitted individuals within the Section 75 groups; how leaders within the authority are engaged in the scheme's implementation; challenges and how they have been overcome; lessons learned; and good practice.

As some of these elements are closely linked in practice, this report presents the key findings from the review in three combined sections:

1. Good practice & how the scheme's implementation has benefitted individuals within the Section 75 groups
2. What challenges emerged and how they have been overcome & how leaders within the authority are engaged in the scheme's implementation
3. Lessons Learned.

2. Methodology

The approach and methodology of the review, developed by the BSO Equality Unit and agreed with the partner organisations, is closely aligned with the Commission's guidance. Importantly, it was designed based on the principles of collaboration, proportionality, and making maximum use of limited resources.

[1] Equality Commission for Northern Ireland (2016): Guidance on conducting a 5 year review of an equality scheme.

The methodology centred on sharing learning and discussions between partner organisations at quarterly Equality Forum meetings convened by the BSO Equality Unit. The agendas of two Forum meetings during 2025-26 were shaped specifically to facilitate focus group discussions on challenges, learning and good practice. Table 1 below identifies the elements of data collection with reference to Equality Commission guidance on 'kinds of evidence' (ECNI 2016, p.4) for each of the sections in the review report.

Table 1: Key elements of data collection

Report Sections (in line with Equality Commission Guidance)	**Approach/Methodology (with reference to Equality Commission Guidance on Kinds of Evidence)**
1. Good practice & how the scheme's implementation has benefitted individuals within the Section 75 groups	Good practice shared by equality leads at quarterly Equality Forum meetings throughout the review period Annual Progress Reports by each of the public authorities • "good practice measures that the public authority itself has undertaken" (ECNI 2016, p.4) • "good practice measures undertaken by similar public authorities" (ECNI 2016, p.4) • "Section 75 annual progress reports that the public authority has completed" (ECNI 2016, p.4) • "the reviewer's own opinions of these matters based on their own practical experience of implementing these arrangements" (ECNI 2016, p.4)
2. Challenges and how they have been overcome & how leaders	Focus Groups at Equality Forum meetings in Sept 2025 and Dec 2025

within the authority are engaged in the scheme's implementation	and further reflective comments from equality leads subsequent to the meetings • "the reviewer's own opinions of these matters based on their own practical experience of implementing these arrangements" • "evidence that senior staff are complying with their scheme commitments and providing appropriate leadership" • "evidence that decision-makers are aware of their obligations"
3. Lessons learned	Focus Groups at Equality Forum meetings in Sept 2025 and Dec 2025 and further comments from equality leads subsequent to the meetings • "the reviewer's own opinions of these matters based on their own practical experience of implementing these arrangements"

3. Key Findings

3.1 Good Practice & how the scheme's implementation has benefitted individuals within the Section 75 groups

Over the reporting period, the partner organisations have taken a pragmatic approach and worked together to promote equality of opportunity and good relations through implementation of their respective Equality Scheme commitments, undertaking joint work. In addition, on an individual organisational basis, partner organisations have developed good practice in their work to improve equality outcomes for people across the Section 75 equality groups. Further information on both types of good practice initiatives is presented below.

A: Good Practice - collaboration

The model of an expert equality service facilitating and supporting partnership working including through an Equality Forum allows sharing of information, learning, good practice, consistency, and efficiencies in the planning and delivery of equality work. This applies in particular to statutory deliverables under the public sector duties.

For example, the BSO and its partner organisations as a collective group worked together on the development of their new Equality and Disability Action Plans for 2023-28. They undertook a collective public consultation exercise on the draft Plans in 2023. The consultation exercise was inclusive and followed good practice in relation to the undertaking of a public consultations. It included utilising a joint consultation list, holding joint consultation meetings, circulating consultation questionnaires, online consultation, face to face meetings with staff and key stakeholders, and engagement with established staff Networks (such as Tapestry, the Disability Staff Network). Consultees' views were considered and recognised. A joint Consultation Report was compiled and published, and consultees' views contributed to the development of discrete equality/disability actions included in the Plans.

With regards to training and awareness raising, the joint training programme provides opportunities for staff to draw on expertise and learning from colleagues across the range of different organisations both

in small group work and plenary discussions. Similarly, the partnership arrangements enable staff to link in with subject matter leads across partner organisations through signposting by the Equality Unit. The centralised publication site for equality screenings, managed by the BSO Equality Unit, allows staff easy access to screenings by partner organisations that might be of relevance to screenings that they are tasked with undertaking.

The Equality Unit and a number of volunteers from the partner organisations worked closely together to develop an Equality Portal hosted by the BSO Equality Unit which is a joint resource for and accessible by all staff working in the BSO and partner organisations. The Portal provides a broad range of relevant equality information and resources, covering for instance equality training, and how to access translation and interpreting services. Particular emphasis is placed on resources for equality screening, including annotated screening templates and guidance for particular types of equality screenings. The Equality Portal is an innovative resource tool for staff. It is updated on a regular basis with pertinent equality information and advice. The development of the Portal is a good practice measure in respect of access to equality information by staff.

With regards to producing outcomes for individuals in the Section 75 groups, joint work over the past five years mainly related to disability such as the Disability Awareness Days held twice a year with speakers from the voluntary sector, for example.

B: Good Practice - individual organisations

In the following, good practice is highlighted in the main in relation to outcomes for individuals in Section 75 groups and some in relation to Section 75 mechanics/internal infrastructure. Good practice in governance and leadership is presented in the later section. Good practice examples abound, many of which are highlighted in the organisations' Annual Progress Reports for each of the five years of the review period. The examples included in this report were selected for the purpose of highlighting different types of outcomes, closely linked to elements of the organisations' Equality Schemes.

Most of the good practice initiatives included below have been presented at a quarterly meeting of the Client Equality Forum, to facilitate learning for forum members, including the opportunity for Q&A and group discussion on the initiative.

- **Northern Ireland Blood Transfusion Service (NIBTS) – access to services**
  Over the reporting period, NIBTS have undertaken a number of developments in relation to public engagement to ensure accessibility to their services goes above requirements. Outcomes for Section 75 equality groups have been improved through initiatives such as Multi Channel Access, which facilitates donor session bookings via the Web, mobile app, and telephone for those without internet access or digital literacy. It also provides language options through multiple language interfaces and translation support for minority ethnic communities. Likewise, assistive features have been utilised by offering reminders via text or email and easy rescheduling options for those with health conditions. Geographic and socioeconomic inclusion has been enhanced through location-based booking, which ensures appointments are distributed fairly across regions, reducing travel barriers for rural communities. Likewise, access for those with caring responsibilities has been improved through a system which provides 24/7 access for bookings.
- **Business Services Organisation (BSO) – new dedicated support for particular staff groups**
  HSC Leadership Centre: Progress Development Programme for Global Majority Staff - This is a bespoke programme to address the disproportionate under-representation of global majority staff in senior positions in the HSC. It aims to support staff to develop in their current role and support their progression. It included Q&A with senior leaders eg. Board Chair, Directors, Assistant Directors and Equality Leads. This facilitated those impacted to directly articulate some of the challenges they face and also some of the enablers for progression. The programmes (one face to face and one virtual) attracted 68 staff from five Trusts, BSO and Department of Health. 79% of those (48) who responded to the post course survey stated they had never previously completed a

leadership programme before. 83% confirmed that they applied because it was a programme targeted at global majority staff. 31% had applied for a new post while on the course or shortly afterwards and 47% said they were actively looking.

- **Children's Court Guardian Agency for Northern Ireland (CCGANI) – quality of mainstream services for particular groups**
  During the period 2023/24, CCGANI undertook an audit of report templates which the Children's Court Guardians use when reporting to the Family Courts. The Welfare Checklist section was expanded in terms of the Guardian addressing diversity, in relation to what makes the child unique, including age, gender identity, religion, cultural heritage, and diversity. In relation to the child's emotional needs the report is to incorporate the child's mental health and wellbeing. The templates were updated in November 2023. The amendments to the report templates were reinforced by cultural competency training which CCGANI arranged for all staff.
- **Northern Ireland Medical & Dental Training Agency (NIMDTA) – new dedicated support for particular staff groups**
  Based on the findings from a survey undertaken with overseas doctors new to NI on their experience of coming to work/live in Northern Ireland, in 2022 NIMDTA progressed significant work to support trainees, including a regional enhanced induction and immigration support. Likewise, a pilot was undertaken of work shadowing for two weeks prior to start date to familiarise the individual with the environment and their team before officially commencing work. One of the difficulties noted for this group of trainees is the range of local accents in Northern Ireland, which new doctors from overseas experienced as difficult to understand.
- **Northern Ireland Practice & Education Council for Nursing and Midwifery (NIPEC) – access to opportunities for particular staff groups**
  NIPEC undertook a Staff Survey for the Global Majority Workforce in Northern Ireland, on Enhancing Access to Educational & Leadership Opportunities, during 2024/25. The Survey was open to Nurses; Midwives; Allied Health Professionals and Support Workers working in HSC Trusts and in Nursing Homes. The Survey

engendered over 1000 responses from Global Majority staff and more than 200 responses from Ethnically White staff. Staff surveyed reported personal barriers to accessing Education, Promotional & Leadership opportunities. These included a perception of discrimination amongst some international nurses, of being denied applications to Midwifery Programmes. Staff surveyed also reported organisational barriers such as language and cultural barriers; lack of information on available opportunities and career pathways. As a result of the survey, NIPEC agreed actions for 2025-2026 to address issues reported on in the Survey. Some of the agreed actions include a commitment by NIPEC to host an Annual Regional Ethnic Diversity Collaborative Workshop and Educational Pathways for International Nurses to be developed by Queens University Belfast and Ulster University and included within NIPEC's Career and Development Model. NIPEC will develop role descriptions for Ethnic Diversity Champions to support HSC Trusts.

- **Northern Ireland Social Care Council (NISCC) – strategic direction**

  Over the past two years, the Social Care Council has embarked on a journey to explore how the organisation can best make progress in promoting equality, diversity and inclusion in the delivery of its functions including as an employer. The organisation recognises that it plays an important influencing role in relation to a wide range of other actors, including registrants, education and training providers, and employers. An internal group has been formed with staff who have a particular interest in the agenda. Likewise, two workshops were held, one with all staff members and the other with its Board and NISCC Participation Partnership members in January and February 2025. These sought to identify equality issues and suggestions for actions at operational and strategic level. In effect, the aim was to start conversations and develop practical actions across all levels of the organisation.

- **Patient and Client Council (PCC) – access and uptake of services**

  In its 'Support in the Community' pilot project, the PCC has focused on widening engagement through outreach work. Across a series of events over 900 people engaged with the organisations. The

project exceeded its engagement targets, successfully reaching individuals from a diverse range of marginalised communities, including, for example, older men, Roma people and those from other ethnic minorities as well as people with a disability. Engagement was broadly equitable across groups, reflecting effective partnership working and culturally appropriate outreach strategies. The findings demonstrate that proactive outreach significantly improves access compared to passive service models. The range of services provided during and subsequent to the events was well aligned with identified needs. Feedback and case studies confirm that interventions were relevant, timely, and impactful, often addressing issues that would otherwise have remained unresolved. The support in the community led approach contributed to improved confidence, understanding, and navigation of health and social care systems.

The project was originally established as a pilot from October 2025 to March 2026 but such was the success the Support in the Community programme has become “Business as Usual”. Indicators strongly suggest positive impact across multiple domains including:

- Increased Access to Advocacy - Increased advocacy uptake is expected to translate into improved health opportunities, empowerment of individuals, which links to an increase for better health outcomes.
- Enhanced Public Involvement and Membership Diversity - The project has strengthened pathways into PCC membership and engagement platforms for underrepresented groups.
- Improved Organisational Intelligence - The development of an asset map of advocacy and support organisations represents a significant organisational gain. This network of networks approach enhances referral pathways, reduces duplication, and strengthens system-wide responses to inequality.

Support in the Community has proven effective in reaching individuals who may feel hesitant to approach statutory services or navigate complaints systems. By embedding advocacy within

trusted local settings, Support in the Community has built confidence, reduced anxiety, and enabled timely resolution of issues and complaints.

- **Public Health Agency (PHA) – internal arrangements**
  During 2025-26, the PHA established a new internal Forum with representation from each Directorate. After Terms of Reference and a paper were prepared and presented to the PHA Agency Management Team (AMT - Chief Executive and Directors) seeking nominations, it became evident that Personal and Public Involvement colleagues were working to set up a similar group in relation to Experience and Involvement. It was then agreed that there would be significant benefits to drawing these together and establishing a PHA Equality, Experience and Involvement (EE&I) Associates Working Group.
- **Regulation and Quality Improvement Authority (RQIA) – new dedicated support for a particular group**
  Older People / Disability - Inspection Support Volunteers
  Following a pilot project of engagement with the Inspection Support Volunteers (ISVs) during 2024-25 a small cohort of ISV's are now embedded in regulation and inspection of care homes. The focused approach of ISVs as lay people is to support a full and complete engagement opportunity with residents during the inspection seeking out their feedback of quality of life whilst the inspector focuses on other areas of regulatory review. The ISV seeks to encapsulate the lived experience of residents which is reflected in the inspection reports. The original cohort were involved in the care home programme but with additional volunteers RQIA aims to extend to agencies and Mental Health and Learning Disability.
- **Safeguarding Board for Northern Ireland (SBNI) – consultation/engagement**
  The requirement to communicate and or engage with children and young people is a statutory function to promote communication between the SBNI Board and children and young people. A wide range of engagement activities were undertaken during the review period. For example, the Trauma Informed Practice (TIP) team consulted with a group of young adults (up to the age of 25 years) who form a group called SKETCH (Sharing Known Experiences to

Change Health and Social Care). This is a group who have had care experiences as children and who advocate and seek to influence health and social care by amplifying the voices of young people. They were engaged as consultants regarding the TIP toolkit. They were asked their views regarding layout, presentation and content. As a result, the TIP team amended some content and increased the number of illustrations. Further engagement was conducted with groups who had 'visible' impairments as well as those not apparent (i.e. wheelchair user, visual impairments, dyslexia, mental health issues). This was to ensure widespread accessibility of the resource. Images within the resource were amended to ensure that positive images of people with disabilities (including children and young people) were portrayed. Consequently, this engagement resulted in a more inclusive and representative system-wide resource.

- **Strategic Performance and Planning Group (SPPG) – availability of equality data for service planning or policy development**

  As referred to earlier, the SPPG is likewise supported on equality matters by the BSO Equality Unit and are represented on the Client Equality Forum, thus forming one of the partner organisations. Throughout the review period, SPPG not only heard but also shared good practice for the benefit of its partners. This included a presentation and demo of the Children and Young People's Strategic Partnership Data Hub. The Partnership is comprised of statutory/voluntary/community organisations and also includes Local Councils and Government Departments. The Partnership develops a single Northern Ireland Children & Young People Plan every three years. The work includes consideration of how to measure high level outcomes and indicators emanating from the Children & Young People NI Strategy. Importantly, the Partnership has developed a full suite of data at Ward level. At the Forum meeting, the lead gave a demonstration of how to use the Data Hub which is accessed from the Children & Young People's Strategic Partnership website. The information provided in the Hub includes maps, profiles and reports and relates to outcomes in respect of physical and mental health for Children and Young

People as per the strategic aims of Children and Young People NI Strategy. A link to the hub was subsequently added to the Equality Portal, thereby improving access for staff to key equality data.

Overall, as to the question which elements of the mechanics of Section 75 primarily bring about change, the reviewers contend that equality screenings form the most important traceable element of Equality Scheme implementation. Changes as a result of the consideration of equality issues are evidenced in the Screening and Mitigation Reports, which form part of the Annual Progress Reports of each of the organisations.

However, whether or not the consideration itself is *due* to Section 75 or merely *in line with* Section 75 ultimately cannot be determined through examination of screening templates. What remains elusive therefore is causation and the question of additionality. Ultimately, the key determining factor for successful Section 75 implementation remains individuals and their personal commitment to the values underpinning equality and diversity work.

3.2 What challenges emerged and how they have been overcome & How leaders within the authority are engaged in the scheme's implementation

With regards to data collection for this section of the review, the methodology drew on the ECNI Leadership Guidance and Checklist[2]. Its key questions were addressed in the discussions with the organisations' equality leads[3].

Many equality leads referred to Board members having a good understanding of the public sector Section 75 duties and their role in this regard. However, a number felt that levels of awareness vary, with some indicating that awareness of the operational detail of equality screening / Annual Progress Reports / Action Plans is likely fairly limited. Those with

[2] Equality Commission for Northern Ireland (2018): Section 75. Demonstrating Effective Leadership.
[3] These relate to: awareness of the duties and understanding by SMTs/equivalents and Boards/equivalents; level of active scrutiny by senior leaders; inclusion of Section 75 requirements in Job Descriptions; allocation of appropriate resources; and organisations working with others and using their influence to promote equality.

new Board members highlighted the commitment to prioritising training in Section 75 for leaders.

Awareness of the duties among leaders was particularly evident in some organisations, for example, where equality is a regular or standing item at senior team and board meetings, and where an equality and/or disability champion at Board level has been appointed.

All equality leads agreed that the approval of the Annual Progress Reports has provided an important opportunity for strengthening awareness amongst senior team and Board members, with this agenda item often generating enthused discussion.

Good governance was identified as key enabler of effective leadership, where Board members are provided with assurance that the duties have been implemented in each paper presented to Board, by confirmation in a cover paper of completion of equality screening. Rather than active in-depth scrutiny by Board members, assurance approaches were taken in most organisations. In some cases, summary information on the key equality issues and how they were addressed were included as part of this process. No instances were highlighted where senior leaders explicitly challenged the quality of equality assessments brought to their attention.

Beyond the general requirements included in all job descriptions to “Assist the organisation in fulfilling its statutory duties under Section 75 of the Northern Ireland Act 1998 to promote equality of opportunity and good relations.”, most partner organisations reported that specific Section 75 requirements were not added to job descriptions as a key duty / responsibility of the postholder. In two organisations these are included for equality leads, however, and in one for the Chief Executive.

Many felt that resources were a barrier to meaningful implementation of the duties, particularly for the smaller organisations. For these organisations, statutory requirements can be difficult to navigate amongst competing pressures from other statutory and corporate requirements. Often, equality is seen as being only the responsibility of the equality lead. Efforts are being made in some organisations to

mitigate this by building capacity amongst staff so that the responsibility for equality belongs to everyone.

Equality leads raised the duplication of resources involved when adopting regional policies by all organisations, including consultation, screening and approval. They highlighted the significant scope for efficiencies, pointing to the need for initial equality screenings to be undertaken by those developing policies at regional level to evidence how equality considerations informed the development of the regional policy. These would then inform screenings at organisational level.

Overall, equality leads in partner organisations felt they are supported by their leaders. Some caveated this support with recognition that there are a wide range of other corporate and statutory responsibilities, all of which require support by leaders, and equality does not get any more or less support than these.

One organisation reported that the Chief Executive chairing the internal Equality Forum signalled strong senior leadership commitment, reinforcing that equality leads had their full support. In another, Board members demonstrated their support for equality through endorsement of a new project to explore how the organisation can best make progress in promoting equality in the delivery of its functions. This support was then further underlined by their participation in a workshop alongside senior staff and a group representing service users and carers, to explore equality issues in relation to the organisation’s functions.

The extent to which organisations influence others to promote equality varies significantly across partner organisations, with the larger organisations demonstrating a greater capacity to do so. For example, those who have responsibility for commissioning services build equality requirements into contracts, such as equality monitoring of service users. One organisation highlighted that their role of inspecting a range of services brings about opportunities to require/influence others to promote equality and human rights. Another reported that they are beginning to introduce equality monitoring when working with voluntary sector organisations.

3.3 Lessons Learned

In line with ECNI Guidance, the review identified key lessons learned, predominantly by drawing on the assessment of equality leads in the10 organisations, based on their practical experience of implementing the Section 75 arrangements.

Firstly, it emerges that over the past five years the importance of senior level commitment to the implementation of the requirements within Equality Schemes has become increasingly evident. Organisations where the mainstreaming of Section 75 requirements is strongly embedded are those where robust governance arrangements are in place. Governance arrangements, agreed by senior leaders, were essential to ensure that equality screening of policies was carried out consistently and meaningfully by policy leads and decision makers.

In addition, partner organisations with an internal equality forum in place found benefits in mainstreaming through the opportunities for shared learning across teams and shared ownership of the equality duties, rather than responsibility only of the nominated equality lead.

Some partner organisations commented on their experience of the volume of work associated with the statutory obligations under Section 75, and the steep learning curve this brings for new staff.

One organisation highlighted the ongoing challenge in recruitment of attracting applicants from diverse backgrounds, to achieve a workforce that is more representative of the population. Another noted the ongoing challenge of incomplete staff equality monitoring data, despite considerable efforts to encourage staff to update their information. Benefits of partnership working among the ALBs, led by dedicated staff in the BSO Equality Unit, has been highlighted in previous Five Year Reviews. This review has again concluded that partnership working has continued to bring about benefits in relation to value for money through economies of scale, and making best use of available resources through the removal of duplication of effort across similar organisations facing similar challenges.

4. Conclusions

This report has presented the key findings from the Five Year Review of Equality Scheme undertaken jointly by the BSO and its partner organisations.

It highlights the benefits of close collaboration between public authorities facilitated and supported by a specialist team of equality practitioners.

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