



# **Equality Impact Assessment Regional Review Programme North West**

This report, from HM Revenue & Customs People Function (Workforce Change) team, provides an update on equality impacts identified at May 2009 as arising from estate changes within the North West as part of the Regional Review Programme. The related UK summary shows the action being taken by the Department to mitigate these impacts and any which emerge in the future. Further updates will be provided.

11 November 2009

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## 1 Regional Review Programme decisions in North West

The decisions on HMRC accommodation in North West are as follows:

**Table 1 – RRP Decisions in North West**

Date decision announced	Urban Centre / Cluster	Buildings reviewed	Review Outcome	Staff in post at announcement <sup>1</sup>
29 February 2008	Liverpool urban centre	Litherland House, Bootle	Retain	315
		St Johns House, Bootle	Retain	579
		The Triad, Bootle	Retain	967
		Imperial Court, Liverpool	Retain	520
		Queens Dock, Liverpool	Retain	1,962
		College St, St Helens	Retain	144
		Birchen House, Birkenhead	Vacate	120
		Graeme House, Liverpool	Vacate	418
		Norwich House, Liverpool	Vacate	42
		Regian House, Liverpool	Vacate	478
		Kingsway House, Widnes	Vacate	94
29 February 2008	Manchester urban centre	Stone Cross House, Bolton	Retain	234
		Albert Bridge House, Manchester	Retain	667
		Building 302, Ground Floor, Manchester	Retain	13
		Westminster House, Manchester	Retain	12
		Custom House, Salford	Retain	401
		Ralli Quays, Salford	Retain	700
		Trinity Bridge House, Salford	Retain	1,838
		Archer House, Stockport	Retain	422
		Roberts House, Altrincham	Vacate	74
		Crown Buildings, Ashton-u-Lyne	Vacate	53
		Minden Parade, Bury	Vacate	30
		Boundary House, Cheadle	Vacate	109
		Boardman House, Leigh	Vacate	60

<sup>1</sup> Source: Headcount data provided by HMRC business units at time of decision

EQIA – Regional Review Programme – North West

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		Royal Exchange, Manchester	Vacate	7
		Phoenix House, Oldham	Vacate	97
		Newgate House, Rochdale	Vacate	34
		Anchorage 2, Salford	Vacate	131
		Wellesley House, Stockport	Vacate	17
29 February 2008	Preston and Blackpool urban centre	Ryscar House, Blackpool	Retain	48
		Chaucer's Walk, Blackburn	Retain	127
		Charles House, Preston	Retain	286
		Diadem House, Preston	Retain	191
		Guild Centre, Preston	Retain	876
		St Mark's House, Preston	Retain	381
		St Mary's House, Preston	Retain	294
		Unicentre, Preston	Retain	526
		Castle House, Accrington	Vacate	111
		Mexford House, Blackpool	Vacate	331
		Lingmell House, Chorley	Vacate	77
		Petros House, Lytham St Anne's	Vacate	33
		Cop Lane, Preston	Vacate	129
Dukes House, Southport	Vacate	77		
4 December 2008	Cluster 20 (Burnley, Nelson)	Towneley House, Burnley	Vacate	50
4 December 2008	Cluster 21 (Crewe, Macclesfield, Northwich)	Crewe House, Crewe	Vacate	76
		Craven House, Macclesfield	Vacate	38
		Dane House, Northwich	Vacate	30
4 December 2008	Cluster 23 (Wigan)	Lingate House, Wigan	Retain	47
		Bridgeman House, Wigan	Vacate	91
4 December 2008	Cluster 24 (Warrington)	Mersey Bank House, Warrington	Retain	148
4 December 2008	Individuals:			
	Barrow in Furness	Furness House, Barrow in Furness	Vacate	39
	Carlisle	Stocklund House, Carlisle	Retain	80

	Kendal	Eskdale House, Kendal	Vacate	45
		Kentmere House, Kendal	Vacate	6
	Lancaster	Charter House, Lancaster	Vacate	40
	Penrith	Voreda House, Penrith	Vacate	26
	Whitehaven	Blencathra House, Whitehaven	Vacate	59

Enquiry centre services will remain in their current location or nearby.

These decisions are being implemented under the management of location-specific Implementation Teams.

## 2 North West: summary of estates and staffing

- 2.1 HMRC has more office space than it needs in North West and, while about 14,840 people work for us in the region<sup>2</sup>, HMRC's current business plans for 2011 predict that we will require around 13,410.
- 2.2 Following the announcement of decisions on the Liverpool, Manchester and Preston/Blackpool urban centres on 29 February 2008 and the 'cluster' and 'individual' locations on 4 December 2008, HMRC has taken action to mitigate the potential equality impacts identified in the original Equality Impact Assessment (EQIA) documents.
- 2.3 The Regional Review Programme (RRP) resulted in decisions to retain 26 offices in North West. Of these, 22 offices are to be retained in urban centres, three within cluster locations and one office within individual locations. Of the 32 offices to be vacated, 21 are within urban centres, five within cluster locations and six within individual locations.
- 2.4 To date, five offices have been fully vacated, and 12 are scheduled for full vacation during 2009/10. There have been no 'partial'<sup>3</sup> vacations although five offices will be partially vacated during 2009/10 as an interim step towards full vacation at a later date. Withdrawal from three of the offices originally scheduled for full vacation during 2009/10 has been deferred to a later vacation date, along with implementing the decisions for the seven offices originally planned for full vacation between autumn 2010 and spring 2011. The position on these buildings is to be monitored by local Implementation Teams and the Department's Estate Consolidation Programme.
- 2.5 Implementation Teams were set up to deliver the original decisions of the RRP. Where staff cannot relocate, either due to their journey being outside reasonable daily travel, caring responsibilities or disability, businesses are exploring alternative options. As the Department considers those options, office accommodation will be provided for staff, either in their current location or at an alternative office within reasonable daily travel. Businesses aim to feed back work to these staff for as long as it is viable to do so. Taking these issues into account, the extent to which office space is vacated is being managed by the

<sup>2</sup> As at 1 May 2009

<sup>3</sup> A 'partial' vacation includes the release of office space such as reducing the number of floors in a building to accommodate (a) staff remaining, or (b) those who are unable to relocate with their business unit. Reduction to Enquiry Centre only is classed as a full vacation from a RRP perspective.

relevant Implementation Team, which will also bear in mind other issues, such as funding priorities.

- 2.6 HMRC values the skills and experience of its staff and it is for that reason that staff are being asked to relocate with their work wherever possible. HMRC is making every effort to find alternative solutions for staff unable to relocate to another HMRC office. Its primary concern, however, must be to meet its business objectives.
- 2.7 The table below summarises the HMRC equality data for North West as at 1 May 2009. A further breakdown of data between urban centres and cluster locations can be found at Appendices A to K.

**Table 2 – Equality Data**

<b>Ethnicity</b>	<b>%</b>	<b>Disability</b>	<b>%</b>	<b>Age Group</b>	<b>%</b>
White	63	Disabled	8	15 - 24	7
Ethnic minority	3	Not disabled	40	25 - 34	19
Chosen not to declare	5	Chosen not to declare	3	35 - 49	45
Not known	29	Not known	49	50 - 59	25
				60+	4
<b>Gender<sup>4</sup></b>	<b>%</b>	<b>Working Pattern</b>	<b>%</b>	<b>Gender (part-time staff)</b>	
				<b>%</b>	
Male	42	Full Time	74	Male	15
Female	58	Part-time	26	Female	85

### Regional Update Summary

- HMRC has consulted and carried out EQIA activity at an urban centre, cluster and individual location level throughout the UK. Details of the impacts identified following decisions on offices in North West urban centres, clusters and individual locations are included in the attached appendices.
- At the time of announcements 2,842 staff in office buildings due to be vacated in North West were expected to relocate with their business unit. Staff and their managers held one-to-one discussions to determine whether or not they were able to relocate, taking their personal circumstances into account. Final decisions were made by the Moderating Groups
- Although 2,842 staff were expected to relocate, for reasons outlined in the UK summary (para 5.4) Moderating Group data is only available for 2, 685 members of staff.
- Of the 2,842 staff expected to relocate:
  - 2,060 (72%) staff are able to relocate with their business unit.
  - Data on whether staff could relocate is currently unavailable for 157 (6%) members of staff.

<sup>4</sup>For information, in this and in the following tables and narratives, HMRC's national gender split is 58% female to 42% male.

- Moderating Group decisions are currently unavailable for 156 (6%) staff.
- Decisions have been deferred for 39 (1%) staff pending receipt of further information.
- 430 (15%) staff are unable to relocate with their business unit.
- For staff who are unable to relocate with their business unit as expected, the Department is already in the process of considering alternative options for these staff. This work is being led by Implementation Teams in negotiation with business units and HR specialists.

## **RACIAL GROUP**

### **Impacts identified in original EQIAs**

- All diversity data quoted in this EQIA is provided by background HR systems as at 1 May 2009 and staff completion is not mandatory. The information is therefore incomplete for ethnicity and disability.
- No issues specific to racial groups were raised as part of the staff consultation process.
- In the original EQIA, no potential adverse impacts were identified that would disproportionately affect staff due to their racial group.

### **Mitigating action identified**

- No mitigating action was required as no impacts were identified.

### **Update on the original EQIAs**

- At this stage no impacts have been identified that would disproportionately affect staff due to their racial group; for this reason updates at urban centre, cluster and individual location level have not been included in this document. HMRC will continue to monitor this information.

## **THOSE WITH A DISABILITY**

- Of the 430 staff unable to relocate with their business unit, 20 (5%) were unable to do so based on health or compassionate grounds (this includes those with a disability).
- The overall percentage of staff unable to relocate due to disability has been reported in the UK summary
- Specific information on disability and health issues will be identified at Moderating Group and local management level. Implementation Teams will continue to work with managers and staff to explore options and potential solutions.

## **GENDER**

- Of the 2,685 members of staff who had one-to-one meetings 1,693 (63%) are female and 992 (37%) are male. The gender split of staff in North West is shown in Table 2 above.
- Of the 430 staff unable to relocate with their business unit, 326 are female (11% of the 2,842 staff expected to relocate with their business unit) and 104 are male (4% of the 2,842 staff expected to relocate with their business unit).
- The overall number and gender of staff unable to relocate due to caring commitments has been reported in the UK summary.
- Options are still being considered for all staff unable to relocate.



## APPENDIX A: Liverpool urban centre - update summary of equality impacts

Table 3 below summarises the HMRC equality data for the Liverpool urban centre as at 1 May 2009.

**Table 3 – Equality Data**

<b>Ethnicity</b>	<b>%</b>	<b>Disability</b>	<b>%</b>	<b>Age Group</b>	<b>%</b>
White	63	Disabled	7	15 - 24	10
Ethnic minority	1	Not disabled	39	25 - 34	22
Chosen not to declare	3	Chosen not to declare	2	35 - 49	43
Not known	33	Not known	52	50 - 59	22
				60+	3
<b>Gender</b>	<b>%</b>	<b>Working Pattern</b>	<b>%</b>	<b>Gender (part-time staff)</b>	
				<b>%</b>	
Male	42	Full Time	74	Male	14
Female	58	Part-time	26	Female	86

### Overview

- At the time of the announcements, 1,126 staff in office buildings due to be vacated in the Liverpool urban centre were expected to relocate with their business unit. Staff and their managers held one-to-one discussions to determine whether or not they were able to relocate, taking their personal circumstances into account. Final decisions were made by the Moderating Groups.
- Although 1,126 staff were expected to relocate, for reasons outlined in the UK summary (para 5.4) Moderating Group data is only available for 1,084 members of staff.
- Of the 1,126 expected to relocate
  - 910 (81%) staff are able to relocate with their business unit.
  - Data on whether staff could relocate is currently unavailable for 42 (4%) members of staff.
  - Moderating Group decisions are currently unavailable for 80 (7%) staff.
  - Decisions have been deferred for 12 (1%) staff pending receipt of further information.
  - 82 (7%) staff are unable to relocate with their business unit.

## **1. THOSE WITH A DISABILITY**

### **Impacts identified in original EQIA**

- Some respondents to the consultation process raised concerns about car parking. TUS also commented on this issue. In addition, concerns were raised that the needs of those with specialist equipment connected with a disability may be overlooked when considering relocation options or 'hot-desking'.
- In the original EQIA, no potential adverse impacts were identified that would disproportionately affect staff with a disability.

### **Mitigating action identified**

- Managers to discuss personal circumstances with staff as part of the one-to-one process, considering further mitigating action such as reasonable adjustments, where appropriate.

### **Update on the original EQIA**

- The overall percentage of staff unable to relocate due to disability has been reported in the UK summary.
- Specific information on disability and health issues will be identified at Moderating Group and local management level. Implementation Teams have been set up which will continue to work with managers and staff to explore options and potential solutions.

## **2. GENDER**

### **Impacts identified in original EQIA**

- No issues specific to gender were raised as part of the staff consultation process.
- No potential impacts were identified in the original EQIA. However, it was acknowledged that HMRC employs more female staff than male staff in many of the locations covered by the assessment.
- The original EQIA recorded the gender ratio of part-time staff in each office as an indication of the proportion of female staff who may have dependants.

### **Mitigating action identified**

- Managers to discuss personal circumstances with staff as part of the one-to-one process.
- As no potential impacts specific to gender were identified, no further mitigating action was required at that stage.

### **Update on the original EQIA**

- Discussions between managers and staff have taken place to identify any personal issues arising. If someone is unable to relocate with their business unit as expected, the Department, with the assistance and support of HR specialists, will consider reasonable alternative solutions.
- Of the 1,084 members of staff who had one-to-one meetings 638 (59%) are female and 446 (41%) are male. The gender split of staff in the Liverpool urban centre is shown above in Table 3, and for North West in Table 2.
- Of the 82 staff unable to relocate with their business unit, 58 are female (5% of the 1,126 staff in Liverpool urban centre expected to relocate with their business unit) and 24 are male (2% of the 1,126 staff in the Liverpool urban centre expected to relocate with their business unit).

- The overall number and gender of staff unable to relocate due to caring commitments has been reported in the UK summary.
- Options are still being considered for all staff unable to relocate.

## APPENDIX B: Manchester urban centre - update summary of equality impacts

Table 4 below summarises the HMRC equality data for the Manchester urban centre as at 1 May 2009.

**Table 4 – Equality Data**

<b>Ethnicity</b>	<b>%</b>	<b>Disability</b>	<b>%</b>	<b>Age Group</b>	<b>%</b>
White	64	Disabled	9	15 - 24	4
Ethnic minority	4	Not disabled	43	25 - 34	14
Chosen not to declare	6	Chosen not to declare	4	35 - 49	47
Not known	26	Not known	44	50 - 59	31
				60+	4
<b>Gender</b>	<b>%</b>	<b>Working Pattern</b>	<b>%</b>	<b>Gender (part-time staff)</b>	
				<b>%</b>	
Male	46	Full Time	78	Male	14
Female	54	Part-time	22	Female	86

### Overview

- At the time of the announcements 587 staff in office buildings due to be vacated in the Manchester urban centre were expected to relocate with their business unit. Staff and their managers held one-to-one discussions to determine whether or not they were able to relocate, taking their personal circumstances into account. Final decisions were made by the Moderating Groups.
- When the decisions were announced it was expected that 587 staff would relocate. However the Moderating Group data shows that 887 staff were asked to relocate.
- Of the 887 asked to relocate
  - 747 (84%) staff are able to relocate with their business unit.
  - Moderating Group decisions are currently unavailable for 41 (5%) staff.
  - 99 (11%) staff are either unable to relocate with their business unit or decisions have been deferred pending receipt of further information.

### 1. THOSE WITH A DISABILITY

#### Impacts identified in original EQIA

- Concerns raised included the potential impact of increased travel time on those with disabilities. TUS were concerned that the needs of those requiring specialist equipment would be overlooked when considering 'hot-desking'.
- In the original EQIA, no potential adverse impacts were identified that would disproportionately affect staff with a disability.

### **Mitigating action identified**

- Managers to discuss personal circumstances with staff as part of the one-to-one process, considering further mitigating action such as reasonable adjustments, where appropriate.

### **Update on the original EQIA**

- The overall percentage of staff unable to relocate due to disability has been reported in the UK summary
- Specific information on disability and health issues will be identified at Moderating Group and local management level. Implementation Teams have been set up which will continue to work with managers and staff to explore options and potential solutions.

## **2. GENDER**

### **Impacts identified in original EQIA**

- No issues specific to gender were raised as part of the staff consultation process.
- No potential impacts were identified in the original EQIA. However, it was acknowledged that HMRC employs more female staff than male staff in many of the locations covered by the assessment.
- The original EQIA recorded the gender ratio of part-time staff in each office as an indication of the proportion of female staff who may have dependants.

### **Mitigating action identified**

- Managers to discuss personal circumstances with staff as part of the one-to-one process.
- As no potential impacts specific to gender were identified, no further mitigating action was required at that stage.

### **Update on the original EQIA**

- Discussions between managers and staff have taken place to identify any personal issues arising. If someone is unable to relocate with their business unit as expected, the Department, with the assistance and support of HR specialists, will consider reasonable alternative solutions.
- Of the 887 members of staff who had one-to-one meetings 563 (63%) are female and 324 (37%) are male. The gender split of staff in the Manchester urban centre is shown above in Table 4, and for North West in Table 2.
- Of the 99 staff unable to relocate with their business unit, 77 are female (9% of the 887 staff in the Manchester urban centre expected to relocate with their business unit) and 22 are male (2% of the 887 staff in the Manchester urban centre expected to relocate with their business unit).
- The overall number and gender of staff unable to relocate due to caring commitments has been reported in the UK summary.
- Options are still being considered for all staff unable to relocate.

## APPENDIX C: Preston and Blackpool urban centre - update summary of equality impacts

Table 5 below summarises the HMRC equality data for the Preston and Blackpool urban centre as at 1 May 2009.

**Table 5 – Equality Data**

<b>Ethnicity</b>	<b>%</b>	<b>Disability</b>	<b>%</b>	<b>Age Group</b>	<b>%</b>
White	61	Disabled	9	15 - 24	2
Ethnic minority	6	Not disabled	35	25 - 34	21
Chosen not to declare	6	Chosen not to declare	4	35 - 49	51
Not known	27	Not known	52	50 - 59	21
				60+	5
<b>Gender</b>	<b>%</b>	<b>Working Pattern</b>	<b>%</b>	<b>Gender (part-time staff)</b>	<b>%</b>
Male	38	Full Time	67	Male	17
Female	62	Part-time	33	Female	83

### Overview

- At the time of the announcements 732 staff in office buildings due to be vacated in the Preston and Blackpool urban centre were expected to relocate with their business unit. Staff and their managers held one-to-one discussions to determine whether or not they were able to relocate, taking their personal circumstances into account. Final decisions were made by the Moderating Groups.
- Although 732 staff were expected to relocate, for reasons outlined in the UK summary (para 5.4) Moderating Group data is only available for 385 members of staff.
- Of the 732 expected to relocate
  - 272 (37%) staff are able to relocate with their business unit.
  - Data on whether staff could relocate is currently unavailable for 347 (47%) members of staff.
  - Moderating Group decisions are currently unavailable for 11 (2%) staff.
  - 102 (14%) staff are either unable to relocate with their business unit or decisions have been deferred pending receipt of further information.

### 1. THOSE WITH A DISABILITY

#### Impacts identified in original EQIA

- Concerns were raised over the potential impact increased travel time could have on staff with disabilities and that the needs of those requiring specialist equipment may be overlooked when considering relocation options or 'hot-desking'.

- In the original EQIA, no potential adverse impacts were identified that would disproportionately affect staff with a disability.

#### **Mitigating action identified**

- Managers to discuss personal circumstances with staff as part of the one-to-one process, considering further mitigating action such as reasonable adjustments, where appropriate.

#### **Update on the original EQIA**

- The overall percentage of staff unable to relocate due to disability has been reported in the UK summary
- Specific information on disability and health issues will be identified at Moderating Group and local management level. Implementation Teams have been set up which will continue to work with managers and staff to explore options and potential solutions.

## **2. GENDER**

### **Impacts identified in original EQIA**

- No issues specific to gender were raised as part of the staff consultation process.
- No potential impacts were identified in the original EQIA. However, it was acknowledged that HMRC employs more female staff than male staff in many of the locations covered by the assessment.
- The original EQIA recorded the gender ratio of part-time staff in each office as an indication of the proportion of female staff who may have dependants.

#### **Mitigating action identified**

- Managers to discuss personal circumstances with staff as part of the one-to-one process.
- As no potential impacts specific to gender were identified, no further mitigating action was required at that stage.

#### **Update on the original EQIA**

- Discussions between managers and staff have taken place to identify any personal issues arising. If someone is unable to relocate with their business unit as expected, the Department, with the assistance and support of HR specialists, will consider reasonable alternative solutions.
- Of the 385 members of staff who had one-to-one meetings 265 (68%) are female and 120 (32%) are male. The gender split of staff in the Preston and Blackpool urban centre is shown above in Table 5, and for North West in Table 2.
- Of the 102 staff unable to relocate with their business unit, 82 are female (11% of the 732 staff in Preston and Blackpool urban centre expected to relocate with their business unit) and 20 are male (3% of the 732 staff in the Preston/Blackpool urban centre expected to relocate with their business unit).
- The overall number and gender of staff unable to relocate due to caring commitments has been reported in the UK summary.
- Options are still being considered for all staff unable to relocate.

## APPENDIX D: Cluster 20 - update summary of equality impacts

Table 6 below summarises the HMRC equality data for staff in Cluster 20 (Burnley, Nelson) as at 1 May 2009.

**Table 6 – Equality Data**

<b>Ethnicity</b>	<b>%</b>	<b>Disability</b>	<b>%</b>	<b>Age Group</b>	<b>%</b>
White	76	Disabled	10	15 - 24	0
Ethnic minority	0	Not disabled	51	25 - 34	7
Chosen not to declare	5	Chosen not to declare	2	35 - 49	39
Not known	19	Not known	37	50 - 59	49
				60+	5
<b>Gender</b>	<b>%</b>	<b>Working Pattern</b>	<b>%</b>	<b>Gender (part-time staff)</b>	<b>%</b>
Male	32	Full Time	71	Male	17
Female	68	Part-time	29	Female	83

### Overview

- At the time of the announcements 40 staff in office buildings due to be vacated in cluster 20 were expected to relocate with their business unit. Staff and their managers held one-to-one discussions to determine whether or not they were able to relocate, taking their personal circumstances into account. Final decisions were made by the Moderating Groups.
- Although 40 staff were expected to relocate, for reasons outlined in the national summary (para 5.4) Moderating Group data is only available for 37 members of staff.
- Of the 40 expected to relocate
  - 35 (88%) staff are either unable to relocate with their business unit or decisions have been deferred pending receipt of further information.
  - Data on whether staff could relocate is currently unavailable for 3 (7%) members of staff.
  - Moderating Group decisions are currently unavailable for 2 (5%) staff.

### 1. THOSE WITH A DISABILITY

#### Impacts identified in original EQIA

- Respondents to the consultation process raised concerns that increased travelling may have an adverse impact on staff with disabilities.
- In the original EQIA, no potential adverse impacts were identified that would disproportionately affect staff with a disability.

### **Mitigating action identified**

- Managers to discuss personal circumstances with staff as part of the one-to-one process, considering further mitigating action such as reasonable adjustments, where appropriate.

### **Update on the original EQIA**

- The overall percentage of staff unable to relocate due to disability has been reported in the UK summary
- Specific information on disability and health issues will be identified at Moderating Group and local management level. Implementation Teams have been set up which will continue to work with managers and staff to explore options and potential solutions.

## **2. GENDER**

### **Impacts identified in original EQIA**

- No issues specific to gender were raised as part of the staff consultation process.
- No potential impacts were identified in the original EQIA. However, it was acknowledged that HMRC employs more female staff than male staff in locations covered by the assessment.
- The original EQIA recorded the gender ratio of part-time staff in each office as an indication of the proportion of female staff who may have dependants.

### **Mitigating action identified**

- Managers to discuss personal circumstances with staff as part of the one-to-one process.
- As no potential impacts specific to gender were identified, no further mitigating action was required at that stage.

### **Update on the original EQIA**

- Discussions between managers and staff have taken place to identify any personal issues arising. If someone is unable to relocate with their business unit as expected, the Department, with the assistance and support of HR specialists, will consider reasonable alternative solutions.
- Of the 37 members of staff who had one-to-one meetings 28 (76%) are female and 9 (24%) are male. The gender split of staff in cluster 20 is shown above in Table 6, and for North West in Table 2.
- Of the 35 staff unable to relocate with their business unit, the majority are female<sup>5</sup>.
- The overall number and gender of staff unable to relocate due to caring commitments has been reported in the UK summary.
- Options are still being considered for all staff unable to relocate.

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<sup>5</sup>Figures omitted in line with HMRC best practice on Diversity Monitoring and Data Protection Principles

## APPENDIX E: Cluster 21 - update summary of equality impacts

Table 7 below summarises the HMRC equality data for staff in Cluster 21 (Crewe, Macclesfield, Northwich) as at 1 May 2009.

**Table 7 – Equality Data**

<b>Ethnicity</b>	<b>%</b>	<b>Disability</b>	<b>%</b>	<b>Age Group</b>	<b>%</b>
White	77	Disabled	15	15 - 24	0
Ethnic minority	0	Not disabled	50	25 - 34	4
Chosen not to declare	3	Chosen not to declare	2	35 - 49	54
Not known	20	Not known	33	50 - 59	37
				60+	5
<b>Gender</b>	<b>%</b>	<b>Working Pattern</b>	<b>%</b>	<b>Gender (part-time staff)</b>	<b>%</b>
Male	31	Full Time	71	Male	11
Female	69	Part-time	29	Female	89

### Overview

- At the time of the announcements 129 staff in office buildings due to be vacated in cluster 21 were expected to relocate with their business unit. Staff and their managers held one-to-one discussions to determine whether or not they were able to relocate, taking their personal circumstances into account. Final decisions were made by the Moderating Groups.
- Although 129 staff were expected to relocate, for reasons outlined in the national summary (para 5.4) Moderating Group data is only available for 115 members of staff.
- Of the 129 expected to relocate
  - 48 (37%) staff are able to relocate with their business unit.
  - Data on whether staff could relocate is currently unavailable for 14 (11%) members of staff.
  - Moderating Group decisions are currently unavailable for 17 (13%) staff.
  - 50 (39%) staff are either unable to relocate with their business unit or decisions have been deferred pending receipt of further information.

### 1. THOSE WITH A DISABILITY

#### Impacts identified in original EQIA

- Responses from staff and TUS during consultation raised concerns that increased travelling may have an adverse impact on staff with disabilities, particularly for those who are unable to drive and are reliant on public transport.
- In the original EQIA, no potential adverse impacts were identified that would disproportionately affect staff with a disability.

### **Mitigating action identified**

- Managers to discuss personal circumstances with staff as part of the one-to-one process, considering further mitigating action such as reasonable adjustments, where appropriate.

### **Update on the original EQIA**

- The overall percentage of staff unable to relocate due to disability has been reported in the UK summary
- Specific information on disability and health issues will be identified at Moderating Group and local management level. Implementation Teams have been set up which will continue to work with managers and staff to explore options and potential solutions.

## **2. GENDER**

### **Impacts identified in original EQIA**

- No issues specific to gender were raised as part of the staff consultation process.
- No potential impacts were identified in the original EQIA. However, it was acknowledged that HMRC employs more female staff than male staff in locations covered by the assessment.
- The original EQIA recorded the gender ratio of part-time staff in each office as an indication of the proportion of female staff who may have dependants.

### **Mitigating action identified**

- Managers to discuss personal circumstances with staff as part of the one-to-one process.
- As no potential impacts specific to gender were identified, no further mitigating action was required at that stage.

### **Update on the original EQIA**

- Discussions between managers and staff have taken place to identify any personal issues arising. If someone is unable to relocate with their business unit as expected, the Department, with the assistance and support of HR specialists, will consider reasonable alternative solutions.
- Of the 115 members of staff who had one-to-one meetings 77 (67%) are female and 38 (33%) are male. The gender split of staff in cluster 21 is shown above in Table 7, and for North West in Table 2.
- Of the 50 staff unable to relocate with their business unit, 36 are female (28% of the 129 staff in cluster 21 expected to relocate with their business unit) and 14 are male (11% of the 129 staff in cluster 21 expected to relocate with their business unit).
- The overall number and gender of staff unable to relocate due to caring commitments has been reported in the UK summary.
- Options are still being considered for all staff unable to relocate.

## APPENDIX F: Cluster 23 - update summary of equality impacts

Table 8 below summarises the HMRC equality data for staff in Cluster 23 (Wigan) as at 1 May 2009.

**Table 8 – Equality Data**

<b>Ethnicity</b>	<b>%</b>	<b>Disability</b>	<b>%</b>	<b>Age Group</b>	<b>%</b>
White	62	Disabled	9	15 - 24	0
Ethnic minority	0	Not disabled	42	25 - 34	9
Chosen not to declare	4	Chosen not to declare	2	35 - 49	54
Not known	34	Not known	47	50 - 59	33
				60+	4
<b>Gender</b>	<b>%</b>	<b>Working Pattern</b>	<b>%</b>	<b>Gender (part-time staff)</b>	<b>%</b>
Male	36	Full Time	63	Male	5
Female	64	Part-time	37	Female	95

### Overview

- At the time of the announcements 43 staff, in office buildings due to be vacated in cluster 23 were expected to relocate with their business unit. Staff and their managers held one-to-one discussions to determine whether or not they were able to relocate, taking their personal circumstances into account. Final decisions were made by the Moderating Groups.
- When the decisions were announced it was expected that 43 staff would relocate. However the Moderating Group data shows that 60 staff were asked to relocate.
- Of the 60 asked to relocate
  - 43 (72%) staff are able to relocate with their business unit.
  - 17 (28%) staff are either unable to relocate with their business unit or decisions have been deferred pending receipt of further information.

### 1. THOSE WITH A DISABILITY

#### Impacts identified in original EQIA

- No issues specific to those with a disability were raised as part of the staff consultation.
- In the original EQIA, no potential adverse impacts were identified that would disproportionately affect staff with a disability.

#### Mitigating action identified

- No mitigating action was required as no impacts were identified.

#### Update on the original EQIA

- The overall percentage of staff unable to relocate due to disability has been reported in the UK summary.

- Specific information on disability and health issues will be identified at Moderating Group and local management level. Implementation Teams have been set up which will continue to work with managers and staff to explore options and potential solutions.

## **2. GENDER**

### **Impacts identified in original EQIA**

- No issues specific to gender were raised as part of the staff consultation process.
- No potential impacts were identified in the original EQIA. However, it was acknowledged that HMRC employs more female staff than male staff in the location covered by the assessment.
- The original EQIA recorded the gender ratio of part-time staff in each office as an indication of the proportion of female staff who may have dependants.

### **Mitigating action identified**

- Managers to discuss personal circumstances with staff as part of the one-to-one process.
- As no potential impacts specific to gender were identified, no further mitigating action was required at that stage.

### **Update on the original EQIA**

- Discussions between managers and staff have taken place to identify any personal issues arising. If someone is unable to relocate with their business unit as expected, the Department, with the assistance and support of HR specialists, will consider reasonable alternative solutions.
- Of the 60 members of staff who had one-to-one meetings 39 (65%) are female and 21 (35%) are male. The gender split of staff in cluster 23 is shown above in Table 8, and for North West in Table 2.
- Of the 17 staff unable to relocate with their business unit, the majority are female<sup>6</sup>.
- The overall number and gender of staff unable to relocate due to caring commitments has been reported in the UK summary.
- Options are still being considered for all staff unable to relocate.

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<sup>6</sup>Figures omitted in line with HMRC best practice on Diversity Monitoring and Data Protection Principles

## APPENDIX G: Individual location - Barrow in Furness - update summary of equality impacts

Table 9 below summarises the HMRC equality data for staff in Barrow in Furness as at 1 May 2009.

**Table 9 – Equality Data**

<b>Ethnicity</b>	<b>%</b>	<b>Disability</b>	<b>%</b>	<b>Age Group</b>	<b>%</b>
White	82	Disabled	3	15 - 24	0
Ethnic minority	3	Not disabled	67	25 - 34	6
Chosen not to declare	0	Chosen not to declare	0	35 - 49	55
Not known	15	Not known	30	50 - 59	39
				60+	0
<b>Gender</b>	<b>%</b>	<b>Working Pattern</b>	<b>%</b>	<b>Gender (part-time staff)</b>	
				<b>%</b>	
Male	21	Full Time	58	Male	0
Female	79	Part-time	42	Female	100

### Overview

- At the time of the announcements 34 staff in the office building due to be vacated in Barrow in Furness were expected to relocate with their business unit. Staff and their managers held one-to-one discussions to determine whether or not they were able to relocate, taking their personal circumstances into account. Final decisions were made by the Moderating Groups.
- When the decisions were announced it was expected that 34 staff would relocate. However the Moderating Group data shows that 35 staff were asked to relocate.
- Of the 35 asked to relocate
  - 1 (3%) member of staff is able to relocate with their business unit.
  - 34 (97%) staff are unable to relocate with their business unit.

### 1. THOSE WITH A DISABILITY

#### Impacts identified in original EQIA

- Respondents with disabilities were concerned that there were no relocation options within reasonable daily travel.
- In the original EQIA, no potential adverse impacts were identified that would disproportionately affect staff with a disability.

#### Mitigating action identified

- No mitigating action was required as no impacts were identified.

#### Update on the original EQIA

- The overall percentage of staff unable to relocate due to disability has been reported in the UK summary
- Specific information on disability and health issues will be identified at Moderating Group and local management level. Implementation Teams have been set up which will continue to work with managers and staff to explore options and potential solutions.

## **2. GENDER**

### **Impacts identified in original EQIA**

- No issues specific to gender were raised as part of the staff consultation process.
- No potential impacts were identified in the original EQIA. However, it was acknowledged that HMRC employs more female staff than male staff in the location covered by the assessment.
- The original EQIA recorded the gender ratio of part-time staff in each office as an indication of the proportion of female staff who may have dependants.

### **Mitigating action identified**

- Managers to discuss personal circumstances with staff as part of the one-to-one process.
- As no potential impacts specific to gender were identified, no further mitigating action was required at that stage.

### **Update on the original EQIA**

- Discussions between managers and staff have taken place to identify any personal issues arising. If someone is unable to relocate with their business unit as expected, the Department, with the assistance and support of HR specialists, will consider reasonable alternative solutions.
- Of the 35 members of staff who had one-to-one meetings 27 (77%) are female and 8 (23%) are male. The gender split of staff in Barrow in Furness is shown above in Table 9, and for North West in Table 2.
- Of the staff unable to relocate with their business unit, the majority are female<sup>7</sup>.
- The overall number and gender of staff unable to relocate due to caring commitments has been reported in the UK summary.
- Options are still being considered for all staff unable to relocate.

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<sup>7</sup>Figures omitted in line with HMRC best practice on Diversity Monitoring and Data protection Principles

## APPENDIX H: Individual location - Kendal - update summary of equality impacts

Table 10 below summarises the HMRC equality data for staff in Kendal as at 1 May 2009.

**Table 10 – Equality Data**

<b>Ethnicity</b>	<b>%</b>	<b>Disability</b>	<b>%</b>	<b>Age Group</b>	<b>%</b>
White	74	Disabled	10	15 - 24	0
Ethnic minority	0	Not disabled	55	25 - 34	2
Chosen not to declare	2	Chosen not to declare	2	35 - 49	38
Not known	24	Not known	33	50 - 59	48
				60+	12
<b>Gender</b>	<b>%</b>	<b>Working Pattern</b>	<b>%</b>	<b>Gender (part-time staff)</b>	<b>%</b>
Male	40	Full Time	71	Male	17
Female	60	Part-time	29	Female	83

### Overview

- At the time of the announcements 46 staff in the office buildings due to be vacated in Kendal were expected to relocate with their business unit. Staff and their managers held one-to-one discussions to determine whether or not they were able to relocate, taking their personal circumstances into account. Final decisions were made by the Moderating Groups.
- Although 46 staff were expected to relocate, for reasons outlined in the national summary (para 5.4) Moderating Group data is only available for 37 members of staff.
- Of the 46 expected to relocate
  - 17 (37%) staff are able to relocate with their business unit.
  - Data on whether staff could relocate is currently unavailable for 9 (20%) members of staff.
  - Moderating Group decisions are currently unavailable for 1 (2%) staff.
  - 19 (41%) staff are unable to relocate with their business unit.

### 1. THOSE WITH A DISABILITY

#### Impacts identified in original EQIA

- Respondents to the consultation process raised concerns that increased travelling may have an adverse impact on staff with disabilities, particularly for those who are reliant on public transport.
- In the original EQIA, no potential adverse impacts were identified that would disproportionately affect staff with a disability.

### **Mitigating action identified**

- Managers to discuss personal circumstances with staff as part of the one-to-one process, considering further mitigating action such as reasonable adjustments, where appropriate.

### **Update on the original EQIA**

- The overall percentage of staff unable to relocate due to disability has been reported in the UK summary.
- Specific information on disability and health issues will be identified at Moderating Group and local management level. Implementation Teams have been set up which will continue to work with managers and staff to explore options and potential solutions.

## **2. GENDER**

### **Impacts identified in original EQIA**

- No issues specific to gender were raised as part of the staff consultation process.
- No potential impacts were identified in the original EQIA. However, it was acknowledged that HMRC employs more female staff than male staff in many of the locations covered by the assessment.
- The original EQIA recorded the gender ratio of part-time staff in each office as an indication of the proportion of female staff who may have dependants.

### **Mitigating action identified**

- Managers to discuss personal circumstances with staff as part of the one-to-one process.
- As no potential impacts specific to gender were identified, no further mitigating action was required at that stage.

### **Update on the original EQIA**

- Discussions between managers and staff have taken place to identify any personal issues arising. If someone is unable to relocate with their business unit as expected, the Department, with the assistance and support of HR specialists, will consider reasonable alternative solutions.
- Of the 37 members of staff who had one-to-one meetings 23 (62%) are female and 14 (38%) are male. The gender split of staff in Kendal is shown above in Table 10, and for North West in Table 2.
- Of the staff unable to relocate with their business unit, the majority are female<sup>8</sup>.
- Options are still being considered for all staff unable to relocate.

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<sup>8</sup>Figures omitted in line with HMRC best practice on Diversity Monitoring and Data Protection Principles

## APPENDIX I: Individual location - Lancaster - update summary of equality impacts

Table 11 below summarises the HMRC equality data for staff in Lancaster as at 1 May 2009.

**Table 11 – Equality Data**

<b>Ethnicity</b>	<b>%</b>	<b>Disability</b>	<b>%</b>	<b>Age Group</b>	<b>%</b>
White	76	Disabled	0	15 - 24	0
Ethnic minority	0	Not disabled	54	25 - 34	19
Chosen not to declare	8	Chosen not to declare	5	35 - 49	51
Not known	16	Not known	41	50 - 59	30
				60+	0
<b>Gender</b>	<b>%</b>	<b>Working Pattern</b>	<b>%</b>	<b>Gender (part-time staff) %</b>	
Male	22	Full Time	62	Male	0
Female	78	Part-time	38	Female	100

### Overview

- At the time of the announcements 31 staff in the office building due to be vacated in Lancaster were expected to relocate with their business unit. Staff and their managers held one-to-one discussions to determine whether or not they were able to relocate, taking their personal circumstances into account. Final decisions were made by the Moderating Groups.
- Although 31 staff were expected to relocate, for reasons outlined in the national summary (para 5.4) Moderating Group data is only available for 22 members of staff.
- Of the 31 expected to relocate
  - 3 (10%) staff are able to relocate with their business unit.
  - Data on whether staff could relocate is currently unavailable for 9 (29%) members of staff.
  - 19 (61%) staff are either unable to relocate with their business unit or decisions have been deferred pending receipt of further information.

### 1. THOSE WITH A DISABILITY

#### Impacts identified in original EQIA

- Respondents to the consultation process raised concerns that increased travelling may have an adverse impact on staff with disabilities, particularly for those who have disabilities that either preclude them from driving, or may be exacerbated by any additional driving required as a result of relocation.
- Respondents with disabilities were concerned that there were no relocation options within reasonable daily travel.

- In the original EQIA, no potential adverse impacts were identified that would disproportionately affect staff with a disability.

#### **Mitigating action identified**

- Managers to discuss personal circumstances with staff as part of the one-to-one process, considering further mitigating action such as reasonable adjustments, where appropriate.

#### **Update on the original EQIA**

- The overall percentage of staff unable to relocate due to disability has been reported in the UK summary
- Specific information on disability and health issues will be identified at Moderating Group and local management level. Implementation Teams have been set up which will continue to work with managers and staff to explore options and potential solutions.

## **2. GENDER**

#### **Impacts identified in original EQIA**

- No issues specific to gender were raised as part of the staff consultation process.
- No potential impacts were identified in the original EQIA. However, it was acknowledged that HMRC employs more female staff than male staff in the location covered by the assessment.
- The original EQIA recorded the gender ratio of part-time staff in each office as an indication of the proportion of female staff who may have dependants.

#### **Mitigating action identified**

- Managers to discuss personal circumstances with staff as part of the one-to-one process.
- As no potential impacts specific to gender were identified, no further mitigating action was required at that stage.

#### **Update on the original EQIA**

- Discussions between managers and staff have taken place to identify any personal issues arising. If someone is unable to relocate with their business unit as expected, the Department, with the assistance and support of HR specialists, will consider reasonable alternative solutions.
- Of the 22 members of staff who had one-to-one meetings 17 (77%) are female and 5 (23%) are male. The gender split of staff in Lancaster is shown above in Table 11, and for North West in Table 2.
- Of the 19 staff unable to relocate with their business unit, the majority are female<sup>9</sup>,
- The overall number and gender of staff unable to relocate due to caring commitments has been reported in the UK summary.
- Options are still being considered for all staff unable to relocate.

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<sup>9</sup>Figures omitted in line with HMRC best practice on Diversity Monitoring and Data Protection Principles

## APPENDIX J: Individual location - Penrith - update summary of equality impacts

Table 12 below summarises the HMRC equality data for staff in Penrith as at 1 May 2009.

**Table 12 – Equality Data**

<b>Ethnicity</b>	<b>%</b>	<b>Disability</b>	<b>%</b>	<b>Age Group</b>	<b>%</b>
White	82	Disabled	0	15 - 24	0
Ethnic minority	5	Not disabled	73	25 - 34	5
Chosen not to declare	5	Chosen not to declare	5	35 - 49	72
Not known	8	Not known	22	50 - 59	14
				60+	9
<b>Gender</b>	<b>%</b>	<b>Working Pattern</b>	<b>%</b>	<b>Gender (part-time staff)</b>	<b>%</b>
Male	36	Full Time	64	Male	25
Female	64	Part-time	36	Female	75

### Overview

- At the time of the announcements 22 staff in the office due to be vacated in Penrith were expected to relocate with their business unit. Staff and their managers held one-to-one discussions to determine whether or not they were able to relocate, taking their personal circumstances into account. Final decisions were made by the Moderating Groups.
- When the decisions were announced it was expected that 22 staff would relocate. However the Moderating Group data shows that 23 staff were asked to relocate.
- Of the 23 asked to relocate
  - 19 (83%) staff are able to relocate with their business unit.
  - Moderating Group decisions are currently unavailable for 4 (17%) staff.

### THOSE WITH A DISABILITY

#### Impacts identified in original EQIA

- No issues specific to those with a disability were raised as part of the staff consultation.
- In the original EQIA, no potential adverse impacts were identified that would disproportionately affect staff with a disability.

#### Mitigating action identified

- No mitigating action was required as no impacts were identified.

### **Update on the original EQIA**

- The overall percentage of staff unable to relocate due to disability has been reported in the UK summary.
- Specific information on disability and health issues will be identified at Moderating Group and local management level. Implementation Teams have been set up which will continue to work with managers and staff to explore options and potential solutions.

## **2. GENDER**

### **Impacts identified in original EQIA**

- No issues specific to gender were raised as part of the staff consultation process.
- No potential impacts were identified in the original EQIA. However, it was acknowledged that HMRC employs more female staff than male staff in the location covered by the assessment.
- The original EQIA recorded the gender ratio of part-time staff in each office as an indication of the proportion of female staff who may have dependants.

### **Mitigating action identified**

- Managers to discuss personal circumstances with staff as part of the one-to-one process.
- As no potential impacts specific to gender were identified, no further mitigating action was required at that stage.

### **Update on the original EQIA**

- Discussions between managers and staff have taken place to identify any personal issues arising. If someone is unable to relocate with their business unit as expected, the Department, with the assistance and support of HR specialists, will consider reasonable alternative solutions.
- Of the 23 members of staff who had one-to-one meetings 16 (70%) are female and 7 (30%) are male. The gender split of staff in Penrith is shown above in Table 12, and for North West in Table 2.
- The overall number and gender of staff unable to relocate due to caring commitments has been reported in the UK summary.
- Options are still being considered for all staff unable to relocate.

## APPENDIX K: Individual location - Whitehaven - update summary of equality impacts

Table 13 below summarises the HMRC equality data for staff in Whitehaven as at 1 May 2009.

**Table 13 – Equality Data**

<b>Ethnicity</b>	<b>%</b>	<b>Disability</b>	<b>%</b>	<b>Age Group</b>	<b>%</b>
White	80	Disabled	4	15 - 24	12
Ethnic minority	0	Not disabled	61	25 - 34	16
Chosen not to declare	2	Chosen not to declare	6	35 - 49	54
Not known	18	Not known	29	50 - 59	18
				60+	0
<b>Gender</b>	<b>%</b>	<b>Working Pattern</b>	<b>%</b>	<b>Gender (part-time staff) %</b>	
Male	27	Full Time	59	Male	0
Female	73	Part-time	41	Female	100

### Overview

- Up to date information is not currently available for Whitehaven. Any equality impacts identified following the one-to-one discussions between managers and staff will be published at a later date.
- The gender split of staff in Whitehaven is shown above in Table 13 and for North West in Table 2.