



Equality Screening Template

Planned Maintenance and Investment

10th September 2025

Clanmil Housing Association has a statutory duty to screen. This includes our strategies, plans, policies, legislative developments; and new ways of working such as – the introduction, change or end of an existing service, grant funding arrangement or facility. This screening template is designed to help you consider the likely equality impacts of their proposed decisions on different groups of customers, service users, staff and visitors.

The screening template has 4 sections to complete. These are:

Section A - asks you to provide details about the policy / decision that is being screened.

Section B - has 4 key questions that require you to outline the likely impacts on equality groups, and all supporting evidence.

Section C - has 4 key questions in relation to obligations under the Disability Discrimination Order

Section D - is the formal record of the screening decision.

Section A

Details about the policy to be screened

Title of policy to be screened: -

Planned Maintenance and Investment

Brief description of policy to be screened: -

This policy covers the key principles for all properties within the Clanmil Group relating to planned maintenance and investment. It applies to all properties owned or managed by the Clanmil Group and sets out the approach to be undertaken.

Clanmil through its design, servicing and maintenance of buildings will maintain its housing stock to a good condition by providing an effective maintenance service to customers and providing great homes for our customers to live well.

The policy takes account of all legislative, regulatory, and good practice requirements in relation to planned maintenance services. The Association shall ensure all its practices align with these terms and requirements.

Aims and objectives of the policy to be screened: -

The overall aim of this policy is to contribute to the efficient and effective maintenance of our homes and ensuring the correct and timely investment is made in an efficient way and that meets the objectives of our Assets Management Strategy and our Energy and Environmental Strategy.

The Association shall implement a robust and transparent system of planning for and costing future planned maintenance works. This shall be based on the regular survey and recording of detailed, accurate and up to date information of our properties and their components to plan our investment in our existing homes.

Annual surveys (20% of stock over 4yrs old) shall be undertaken as a means of collecting this information, while all members of the team shall be actively encouraged to feedback information about the condition of any properties they visit.

The Association will aim to achieve continuous improvement in standards through the setting of objectives and targets for their achievement. The objectives of this policy are:

- Ensure that all investment work represents value for money, balancing quality, cost, and long-term asset performance.
- To achieve high levels of customer service and customer satisfaction
- To monitor the performance of contractors and strive for quality workmanship and minimise inconvenience
- To provide a service which reflects our commitment to equality of access for all customers.
- Where possible, ensure planned investment works contribute to the Association's environmental sustainability objectives, such as improving energy efficiency, reducing carbon emissions, and using environmentally responsible materials

On whom will the policy impact?

Consider the internal and external impacts (both actual or potential)

Yes Staff / other public sector orgs (specify)

N/A Voluntary / community groups / trade unions

Yes Others, please specify – Clanmil customers (tenants and residents)

Are there linkages to other Agencies/ Departments? Yes

The Assets (Planned) Department is the department primarily responsible for the implementation of the Planned Maintenance & Investment Policy. Housing colleagues feed into desirable works to planned programme design and the Executive Director of Finance ensures sufficient provision is made in the long term financial plan for sufficient assets investment.

Contractors are also key partners as they will carry out works identified by Clanmil and Independent Consultants who are appointed to provide specific advice to Clanmil when carrying out planned works.

Section B

1. Outline consultation process achieved or planned

Consultation was carried out internally with Assets and the Executive Team Board.

2. Available evidence

What evidence / information (both qualitative and quantitative) have you gathered to inform this policy? Set out all evidence below to help inform your screening assessment. Please note: It is important to record information gathered from a variety of sources such as:

- Monitoring information
- Complaints
- Research /surveys
- Consultation exercise and other public authorities

Section 75 category	Details of evidence / information and engagement
Religious belief	
Political opinion	

Racial group	
Age	
Marital status	
Sexual orientation	
Men & women generally	See below
Disability	See below
Dependants	See below

Following each planned maintenance project, tenant satisfaction surveys are completed and the number of responses received for the year ending 31st March 24 is shown below.

During the year 588 survey responses from customers received following works. This was out of a total of 853 surveys issued, which is a 69% response rate. Overall satisfaction was 68.9%

For the year ending 2025, customer satisfaction increased to 98.56%.

KPIs

Assets have a total of 39 KPIs in place and 22 deal with performance on the Planned Assets. Performance of these are reported to Board, GARC and ET Board.

Complaints

Clanmil has a formal complaints process in place where all formal complaints are registered. During the year ending 31st March 25 Assets received a total of 34 complaints (68%) which were handled at Stage 1.

There were 8 complaints dealt with at Stage 2.

During the year there were 157 Make it Right complaints of which 100 were handled by Assets

- 3. What is the likely impact (indicate if the policy impact is positive or negative) on equality of opportunity for those affected by this policy, for each of the Section 75 equality categories? What is the level of impact?**

Section 75 category	Likely impact?	Level of impact? Minor/Major/None
Religious belief		None
Political opinion		None
Racial group		None
Age		None
Marital status		None

Sexual orientation		None
Men and women generally	Positive	Minor
Disability	Positive	Minor
Dependants	Positive	Minor

2. Are there opportunities to better promote equality of opportunity for people within the Section 75 equalities categories?

Section 75 category	If Yes, provide details	If No, provide reasons
Religious belief	N/A	No – see below
Political opinion	N/A	No – see below
Racial group	N/A	No – see below
Age	N/A	No – see below
Marital status	N/A	No – see below
Sexual orientation	N/A	No – see below

Men and women generally	N/A	No – see below
Disability	N/A	No – see below
Dependants	N/A	No – see below

The Planned Maintenance and Investment Policy has a positive impact on the customers living in our properties where planned works are carried out. This is evidenced by overall satisfaction levels of 98.56% in for the year ending 2024/25.

To what extent is the policy likely to impact (positive or negatively)on good relations between people of different religious belief, political opinion or racial group? What is the level of impact?

Good relations category	Likely impact?	Level of impact? Minor/Major/None
Religious belief	N/A	None
Political opinion	N/A	None
Racial group	N/A	None

- 3. Are there opportunities to better promote good relations between people of different religious belief, political opinion or racial group?**

Good relations category	If Yes, provide details	If No, provide reasons
Religious belief		No
Political opinion		No
Racial group		No

Section C

Clanmil Housing Association also has legislative obligations to meet under the [Disability Discrimination Order](#) and Questions 5 -6 relate to these two areas.

Consideration of Disability Duties

5. Does this proposed policy provide an opportunity for the Association to better **promote positive attitudes** towards disabled people? yes

The policy sets out the approach we will take regarding the ongoing planned maintenance of all of our properties. Where planned maintenance projects are carried out, extensive consultation is carried out with our customers and where there are any with a disability, this is taken into account so that they too receive a high level of service from our colleagues and contractors.

6. Does this proposed policy provide an opportunity to actively **increase the participation** by disabled people in public life?

Ongoing planned maintenance works ensures that all customers continue to live in high quality homes. One area of planned works which significantly increases the participation of disabled people is where aids and adaptations are provided. For major works i.e. those over £20,000 adaptations have a significant impact to increase the participation of disabled people in public life.

Monitoring Arrangements

Section 75 places a requirement for Clanmil Housing Association to have equality monitoring arrangements in place in order to assess the impact of policies and services etc; and to help identify barriers to fair participation and to better promote equality of opportunity.

Outline what data you will collect in the future in order to monitor the impact of this policy / decision on equality, good relations and disability duties.

Equality	Good Relations	Disability Duties
	.	See below

The one area of planned maintenance where data is collected specifically regarding those with a disability is the area of Aids and Adaptations. During the year overall satisfaction for this area of work was 98.31%

Section D

Formal Record of Screening Decision

Title of Proposed Policy being screened: -

Planned Maintenance and Investment

I can confirm that the proposed policy has been screened for –

Yes	equality of opportunity and good relations
Yes	disabilities duties

On the basis of the answers to the screening questions, I recommend that this policy / decision is –

*place an X in the appropriate box below

☐	*<u>Screened In</u> – Necessary to conduct a full EQIA
☒	*<u>Screened Out</u> – No EQIA necessary (no impacts) Various pieces of legislation, standards and guidance which are contained in the Policy specify the way in which planned works are to be delivered by registered HAs. This policy sets out how it will meet those various standards.
☐	* <u>Screened Out</u> - Mitigating Actions (minor impacts) • Provide a brief note here to explain how this decision was reached: • Explain what mitigating actions and / or policy changes will now be introduced:

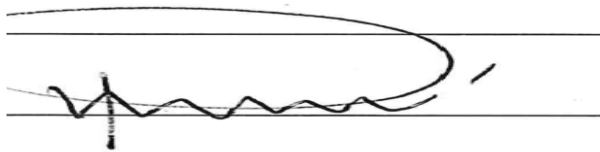
Formal Record of Screening Decision (cont)

Screening assessment completed by (Manager level) -

Name: J Pow

Date: 10th September 2025

Department : Assets

A handwritten signature in black ink, appearing to be 'J Pow', written on a set of three horizontal lines.

Screening decision approved by (Director level) -

Name:

T Giffen, EDA&BS

Date: September 2025

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The screening form will be placed on the website and a link provided to the Association's Section 75 consultees.

For more information about equality screening contact Bernadette O'Donnell, HR Business Partner at bernadette.odonnell@clanmil.org.uk