



**Notice of a public meeting of  
Learning & Culture Overview & Scrutiny Committee**

**To:** Councillors Taylor (Chair), Fitzpatrick (Vice-Chair), Reid, Potter, Gunnell, Brooks, Wiseman, Thomas (Co-opted Statutory Member) and Pennington (Co-opted Statutory Member)

**Date:** Tuesday, 24 February 2015

**Time:** 5.30 pm

**Venue:** The Auden Room - Ground Floor, West Offices (G047)

**AGENDA**

**1. Declarations of Interest**

At this point, Members are asked to declare:

- any personal interests not included on the Register of Interests
- any prejudicial interests or
- any disclosable pecuniary interests

which they may have in respect of business on this agenda

**2. Minutes (Pages 1 - 10)**

To approve and sign the minutes of the meeting held on Wednesday 21 January 2015.

**3. Public Participation**

At this point in the meeting, members of the public who have registered their wish to speak regarding an item on the agenda or an issue within the Committee's remit can do so. The deadline for registering is Monday 23 February 2015 at 5:00 pm. Members of the public can speak on agenda items or matters with the remit of the committee.

To register please contact the Democracy Officers for the meeting, on the details at the foot on the agenda.

## **Filming, Recording or Webcasting Meetings**

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- 4. York Theatre Royal - Service Level Agreement Performance Bi-annual Update Report** (Pages 11 - 22)  
This report is to inform the Scrutiny Committee of the progress and performance of the York Theatre Royal under the current Service Level Agreement (SLA).
- 5. Careers Review- Further Update on Implementation of Recommendations** (Pages 23 - 38)  
This report provides Members with a second update on the implementation of the recommendations arising from the previously completed scrutiny review of Careers, Education, Information, Advice & Guidance (CEIAG). Members are asked to sign off all those now considered fully implemented.
- 6. Draft Final Report -'Disabled Access To York's Heritage & Cultural Offer' Scrutiny Review** (Pages 39 - 426)  
This report presents the findings from the recently completed scrutiny review of Disabled Access to York's Heritage & Cultural Offer, and asks the Committee to agree the Task Group's draft recommendations, to enable the final report to be presented to a future meeting of Cabinet.

**7. Draft Final Report - 'Narrowing the Gap' Scrutiny Review**

(Pages 427 - 486)

This report presents findings from the recently completed Narrowing the Gap scrutiny review and asks the Committee to agree the Task Group's draft recommendations, to enable the final report to be presented to a future meeting of Cabinet.

**8. Learning and Culture Overview and Scrutiny Committee Workplan 2014/15 including a verbal update on ongoing 'Entrepreneurship in York Schools' Scrutiny Review**

(Pages 487 - 488)

Members are asked to consider the Committee's workplan for the 2014-15 municipal year and receive a verbal update on the ongoing Entrepreneurship in York Schools scrutiny review.

**9. Urgent Business**

Any other business which the Chair considers urgent under the Local Government Act 1972.

Democracy Officers

Catherine Clarke and Louise Cook (job share)

Contact details:

- Telephone – (01904) 551031
- Email [catherine.clarke@york.gov.uk](mailto:catherine.clarke@york.gov.uk) and [louise.cook@york.gov.uk](mailto:louise.cook@york.gov.uk)

(If contacting by email, please send to both Democracy Officers named above).

For more information about any of the following please contact the Democracy Officers responsible for servicing this meeting:

- Registering to speak
- Business of the meeting
- Any special arrangements
- Copies of reports

Contact details are set out above

**This information can be provided in your own language.**

我們也用您們的語言提供這個信息 (Cantonese)

এই তথ্য আপনার নিজের ভাষায় দেয়া যেতে পারে। (Bengali)

Ta informacja może być dostarczona w twoim własnym języku. (Polish)

Bu bilgiyi kendi dilinizde almanız mümkündür. (Turkish)

یہ معلومات آپ کی اپنی زبان (بولی) میں بھی مہیا کی جاسکتی ہیں۔ (Urdu)

 **(01904) 551550**





City of York Council

Committee Minutes

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Meeting	Learning & Culture Overview & Scrutiny Committee
Date	21 January 2015
Present	Councillors Taylor (Chair), Fitzpatrick (Vice-Chair), Reid, Potter, Gunnell, Brooks and Wiseman. Mr A Pennington (Co-opted Statutory Member)
Apologies	Mr E Thomas (Co-opted Statutory Member)

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### **38. Declarations of Interest**

At this point in the meeting, Members were asked to declare any personal interests not included on the register of interests, any prejudicial interests or disclosable pecuniary interests which they might have in respect of the business on the agenda or any other general interest they might have within the remit of the committee. Councillor Taylor declared a personal interest in agenda item 6 (Attendance of Chair of York@Large) as he is employed by the City Screen who have been involved with red letter nights.

### **39. Minutes**

Resolved: That the minutes of the last meeting of the Learning and Culture Overview and Scrutiny Committee held on 19 November 2014 be approved and signed by the chair as a correct record.

### **40. Public Participation**

It was reported that there had been no registrations to speak under the Council's Public Participation Scheme.

**41. York Theatre Royal - Service Level Agreement Performance Bi-annual Update Report**

This item had been withdrawn prior to the meeting. Members were advised that the update on the progress and performance of the York Theatre Royal under the current Service Level Agreement (SLA) would be provided at the next meeting of the committee due to take place on 24 February 2015.

**42. Attendance of Chair of Learning City**

The Chair of Learning City York attended the meeting with the Learning City Partnership Manager to provide an update on how the organisation had been working with the Council and other partners to deliver joint services since it provided its last update in March 2014. The Powerpoint presentation has been attached to the online agenda.

Members were reminded that Learning City York's aim and priorities which were sustainable business growth, enterprise and an enterprising culture, employability and economic inclusion, and personal, social and community development. The partnership provided support to children and young people (including undergraduates / graduates), families and communities, working age adults (both those in and out of work) and employers, including self-employed.

Officers explained that while York Learning Partnership focused on young people up to the age of 19 and Learning City York focused on adult provision from age 19 upwards, there was some overlap in the 19 to 24 age range with crucial links with York Economic Partnership and other key groups and organisations.

Officers updated the committee on services which had been delivered with City of York Council during 2014. A key focus had been on business growth & productivity with a lot of work taking place in this area and a number of projects led by partners. With regard to employability & career progression, work had been taking place with the unemployed, Job Centre Plus and schools with lots of activity around apprenticeships, as well as the celebration of

skills and lifelong learning. Members noted that key factors in delivering services included signposting where necessary, building links with Make it York and making the most of European funding.

The Chair of Learning City York and the Council's Learning City Partnership Manager responded to Members questions in relation to the use of intelligence in informing priority actions, European funding, and with regard to information which they felt could help inform the review currently being carried out by the committee on Entrepreneurship in York Schools.

Resolved: That the update be noted.

Reason: In order that Members are kept informed on work undertaken by the Council's strategic partners.

#### **43. Attendance of Chair of York@Large**

The Chair of York@Large attended the meeting and provided an update on how the organisation had been working with the Council and other partners to deliver joint services since Members had received their last update in September 2013. A copy of the PowerPoint presentation has been attached to the online agenda.

The Chair advised Members that, as well as the City of York Council, the cultural partnership had partners from within the arts, education, festivals, media and creative industries, museums, universities, the voluntary sector, visitor attractions and tourism.

He provided an update on activity which had taken place in relation to the following initiatives: Red Letter Nights; Make it York; Festival of Faith; Tour de France Yorkshire Festival; York@Large recruitment; York TV; Cultural Plan; UNESCO City of Media Arts; Urban Realm; York@Large workshop; and Legible York, which he explained would see the introduction of new signposting in the city.

He confirmed that during 2015, the cultural partnership would be working with City of York Council as its strategic partner and the council, York Explore and Make it York as its delivery partners, to promote the following priorities:

- Red Letter Nights, York City of Media Arts, York TV
- Legible York, Case for Culture, York Awards
- Research
- Review partnership in new context

He provided further information in response to specific queries raised by members during discussion.

Resolved: That the update from York@Large be noted.

Reason: In order that Members are kept informed on work undertaken by the Council's strategic partners.

#### **44. 2014/15 Second Quarter Financial, Performance & Equality Monitoring Report**

Members considered a report which provided an analysis of the latest performance for 2014-15 and a forecast of the financial outturn position by reference to the service plan and budgets for all of the relevant services falling under the responsibility of the Director of Communities and Neighbourhoods and the Director of Children's Services, Education and Skills.

Members noted that the projected overspend of £750,000 was an improvement on quarter 1 and that the figures due to be reported to Cabinet the following month indicated that this overspend had reduced further since quarter 2 for both the Communities and Neighbourhoods directorate and the Children's Services, Education and Skills directorate.

Members suggested it would be useful if the information in relation to pupils eligible for free school meals could be highlighted better and that the inclusion of a narrative in relation to the figures provided in Annex 1 would be beneficial.

Officers confirmed that the statement in paragraph 13 with regard to a teaching assistant being appointed to support transition from KS2 to 3 and KS3 to 4 was not specifically in relation to travellers' children but instead a more general comment. Members asked for an update on this to be provided in the next update to committee.

The Finance Manager agreed to pass these comments onto officers in the performance team in order that they could be taken into account for the production of future reports. <sup>1</sup>

Resolved: That the report be noted.

Reason: To update the committee on the latest financial and performance position for 2014-15.

Action Required

1. Finance Manager to pass on Members comments to Performance officers with regard to preparation of next update report. RH

**45. Bi-Annual Safeguarding Update**

Members received a six monthly update report on key local and national safeguarding developments since July 2014. The report addressed those issues that directly concerned or related to the delivery of the children's safeguarding arrangements by the council. Members noted that they would receive an update from the Independent Chair of York's Local Safeguarding Children's Board on wider multi agency safeguarding at the next meeting of the committee.

Members noted:

- The peer challenge outcomes and the local authority's response
- The continuous improvement plan
- The improved performance monitoring and reporting arrangements
- The progress of the Child in Need service
- The outcome of the most recent DBS (Disclosure And Barring Service) audit
- The continued progress of the Keeping Families together strategy.

Members noted that they would receive further updates on progress in these areas as part of future committee six-monthly reports.

Resolved: That the report be noted.

Resolved: To allow Members to be fully informed on key children's safeguarding issues in York and to support Member challenge in this area.

**46. School Improvement Update: Key Stage 4 Performance 2014**

Members considered a report which provided an update on Key Stage 4 (KS4) performance in 2014.

Members acknowledged that the significant changes in both the national KS4 performance indicators and the examination system in 2014 had created turbulence and meant it was difficult to make comparisons between the KS4 results for this year and previous years. Members noted that the national performance tables had not yet been published and the data used in the report had been taken from the invalidated RAISEonline reports produced by Ofsted.

The Council's 14-19 Development Manager responded to specific issues raised by members. Members were advised that attainment in York had remained significantly above the national average across all the main performance indicators. The pupil group which performed below national average was disadvantaged pupils (those eligible for free school meals (FSM) and children looked after by the authority.) The gap in achievement between disadvantaged pupils and their peers had widened in York in 2014 but this was as a result of non disadvantaged pupils achieving significantly better in 2014. Members commented that the committee was currently undertaking a review on Narrowing the Gap.

Resolved: That the report be noted.

Reason: To update the Committee on secondary school performance in 2013-14.

#### **47. Tour de France Scrutiny Review - Update Report**

Members considered a report which provided them with further information in support of the Committee's consideration of a proposed scrutiny review of the planning, promotion and delivery of the Council's programme of activities which accompanied the Tour de France. A report which had been considered by Cabinet at their meeting the previous evening was appended to the scrutiny report as Annex B. The Cabinet report detailed the outcomes achieved against the objectives set by Cabinet in 2013 and reported on the management of the event and lessons learned for the future.

In light of the information contained within the Cabinet report, the committee's current review workload and the proposed consultation the committee had previously identified for the review, Members were asked to consider whether the agreed aim identified at paragraph five of the report was still appropriate and whether the review could be undertaken within the current municipal year.

Some Members expressed the view that the Cabinet report did not address the issues identified in the committee's proposed review remit and that the review should still be undertaken in order to address those issues. They confirmed they were happy with the proposed review remit.

Members agreed that the high workload associated with the three ongoing reviews and the limited time remaining before the end of the municipal year (noting also the start of the purdah period on 30 March) would make it difficult to undertake the review during the current municipal year. Some Members felt it would be better to prioritise the review on the committee's workplan for the next municipal year.

Members however acknowledged also that the forthcoming election would mean a change in the committee's membership and that it could be some months into the new municipal year before the new committee would be ready to commence a review. Some members felt that it would be difficult to pass the review onto a new set of members and raised concerns that it may not get undertaken. Some felt that if the committee did not start the review now, it would look bad from a public viewpoint.

Following discussion and consideration of the above factors, it was agreed that the Tour de France review should be deferred until the next municipal year but that priority should be given to this review going forward as the first review of the next municipal year. Members agreed it would be possible to seek nominations to the Task Group at the same time as seeking nominations to the Committee.

- Resolved:
- (i) That, due to the limited timeframe and current heavy review workload, the Tour de France Scrutiny review be deferred until the next municipal year.
  - (ii) That the proposed remit be agreed and the review be prioritised on the workplan for the forthcoming year.

Reason: In order that the Committee is able to devote the required time and effort to undertaking the review in line with scrutiny procedures and protocols.

**48. Learning and Culture Overview and Scrutiny Committee Workplan 2014/15 including a verbal update on ongoing reviews**

Members considered the committee's work plan for the remainder of the 2014-15 municipal year and received a verbal update on the ongoing reviews.

They agreed that the following items be added to the next meeting scheduled for 24 February 2015.

- York Theatre Royal – Service Level Agreement Performance Bi-annual Update Report. (originally scheduled for 21 January meeting)
- Further update on implementation of recommendations arising from previously completed Careers Education Information Advice and Guidance (CEIAG) Scrutiny Review (At their meeting in July 2013, Members had signed off three recommendations as completed but other recommendations remained outstanding)



The Scrutiny Officer asked if Members would be interested in receiving an overview of 'Make it York' as there had been a lot of discussion around it recently. Members felt that as the two final meetings of the civic year already had lengthy proposed agendas, it would be more sensible if they could be provided with some written information in the first instance.

Members noted that all the ongoing reviews were progressing well.

Resolved: (i) That the work plan, including the above amendments, be agreed.

(ii) That the updates on the ongoing scrutiny reviews be noted.

Reason: To keep the committee's work plan updated.

Councillor Taylor, Chair

[The meeting started at 5.30 pm and finished at 7.50 pm].

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**Learning & Culture Overview & Scrutiny Committee** 24 February 2015

Report of the Assistant Director (Communities, Culture and Public Realm)

**York Theatre Royal: 2014/15 Half Year Performance Update****Summary**

1. This report is to inform the Scrutiny Committee of the progress and performance of the York Theatre Royal under the current Service Level Agreement (SLA).

**Background**

2. The SLA is a joint agreement between the Council and the York Theatre Royal. The SLA sets out:
  - The key objectives of the partnership and partnership arrangements
  - Performance targets and indicators to be met by the Theatre
  - Performance information to be provided, review and reporting procedures
3. The key partnership requirements covered in the SLA are:
  - To maintain and develop York Theatre Royal as a local, regional and national theatre provider, creating productions of quality, daring, delight and accomplishment for the citizens of York and the region, and for visitors to the city.
  - To continue to develop local and nationally significant programmes of work with partnerships across the UK and internationally, that contribute to making York a vital and vibrant city and extending our reputation for world class culture.
  - To encourage creative expression and engagement with the community, through a diverse programme of work, both on and off stage, that offers a cultural mix of entertainment, innovation, participation and enjoyment.
  - To develop work and activities that promotes the enjoyment of Theatre with older people and diverse communities.

- To work in active partnership with business, education, community and arts organisations, and local authority service providers to extend both the range and reach of the Theatre's work.

4. Reports are brought to Scrutiny Committee twice a year to report on performance against the outcomes agreed in the SLA. Annex 1 sets out in detail the work undertaken in the first 6 months of 2014/15 and the plans in development for the future.

### **Consultation**

5. This report is for information only and there is no consultation to consider.

### **Options**

6. This report is for information only and there are no options to consider.

### **Corporate Objectives**

7. York Theatre Royal contributes to a number of corporate objectives including developing opportunities for residents and visitors to experience York as a vibrant and eventful city, improving opportunities for learning, and in strengthening York's economy through investment in the tourism infrastructure.

### **Implications**

8. **Finance:** The Council's funding in 2014/15 is £203,600, a reduction of £70k compared to £273,600 in 2013/14. The funding reduces to £173,600 in 2015/16. The Council has also made available £500k of capital to support the Theatre's successful Arts Council funding bid for refurbishment of the theatre.
9. The report has no additional implications relating to:
  - Human Resources
  - Legal
  - Crime and Disorder
  - Information Technology

10. **Equalities.**

Annex 1 sets out the contribution the Theatre makes to support our Equalities agenda.

**Risk Management**

- 11. In compliance with the Council's risk management strategy there are no risks associated with the recommendations of this report.

**Recommendations**

- 12. The Scrutiny Committee is asked to note the report and comment upon the progress that the Theatre has made in the last 6 months

Reason: To fulfil the Council's role under the Service Agreement.

**Contact Details**

**Author and Chief Officer responsible for the report:**

Charlie Croft  
Assistant Director  
(Communities, Culture &  
Public Realm)

**Report Approved**  **Date** 13 February 2015

**Wards Affected:**

**All**



**For further information please contact the author of the report**

**Background Papers: None**

**Annexes**

Annex 1: York Theatre Royal Performance report

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## York Theatre Royal: Service Level Agreement report

### February 2015

This report will give an update of delivery against the Service Level Agreement (SLA) between the City of York Council and York Citizens' Theatre Trust Ltd.

The report covers the period from September 2014 to January 2015 with cumulative quantitative measures from April 2014 to January 2015.

The total audience attendance from April 2014 to January 2015 was 168,323. This means that in 2014/5 the Theatre Royal will exceed its agreed level of attendance in its SLA.

### **PARTNERSHIP DELIVERY 2012/2018**

SLA conditions are noted in bold with the details of how the theatre has been working to achieve them underneath.

- 1. Provide a year round programme of work which shall include in-house productions, including a pantomime, youth theatre productions, touring drama productions, and hires to local amateur companies**

Over the period from September 2014 to January 2015 York Theatre Royal has presented 317 performances across the Main Theatre, Studio Theatre and De Grey Ballroom. Attendances at these performances and events for this period was 80,504. This represents a record-breaking level of attendance in the theatre for an Autumn season.

York Citizens Theatre Trust produced 6 home-produced shows over this period including **Betrayal, Princess & the Pea, Puss in Boots, The Restoration of Nell Gwynne, Helver's Night and Old Mother Goose.**

Two of these productions toured across the UK following performances in York.

This season also included the TakeOver Festival of work programmed and managed by young people under the age of 26 years old. The week-long Festival in October presented 13 different productions across the Main Theatre, Studio Theatre and De Grey Ballroom. Over 2,000 people came to the events during the week. The artistic programme included Edinburgh Fringe First companies and other award-winning companies and productions. This week of events gives over 100 young people the opportunity to work together with the common goal of bringing new artistic voices to the theatre and city.

This period included a very varied, high quality and very popular programme of theatre in the Main Theatre. Productions included the world premiere of Pat Barker's outstanding World War One novel, **Regeneration**, a new adaptation and production of Orwell's **1984**, a world premiere stage adaptation of the best-selling novel, **The Kite Runner**, and hugely entertaining production of **She Stoops to Conquer** from Northern Broadsides. There was also a welcome return for **The Women in Black**.

This season is one of the most successful in terms of variety and attendance.

York Theatre Royal enjoyed the productions of some of the best of community theatre during the season with York Opera's **Pirates of Penzance**.

## **2. Provide sign language interpreted and audio described performances and touch tours**

All of the York Citizens Theatre Trust productions in the main theatre have sign interpreted, audio-described and captioned performances. All theatre productions that tour to the theatre for a week in the main theatre offer audio-described performances. All audio-described performances are preceded by a touch tour of the stage. The theatre has a pool of dog sitters for guide dogs.

## **3. Provide a regular Youth Theatre for at least 250 young people annually**

Across the Autumn term over 340 young people took part in the Youth Theatre in 14 different youth theatre groups from the ages of 5 to 18. They attended weekly classes, extra rehearsals, theatre performances and Youth Forum sessions.

Examples of activity in Youth Theatre during the Autumn include a project with our 11 – 14 year olds who have taken Freedom Theatre as their stimulus this term. Freedom Theatre is based in Palestine and it creates art as a form of cultural resistance. At the end of the Autumn term they shared their work with each other and parents, and raised money to buy theatre tickets for the young people of Jenin to go to performances at Freedom Theatre.

The Youth Theatre continues to give an opportunity to support new young and emerging artists in York.



The 16+ Groups had two productions in the Studio season. One was an adaptation of Brecht's **Caucasian Chalk Circle** by an ex member of Youth Theatre and the other was a play from the award-winning Lee Hall, **Mr Puntilla and his man Matti**. Both received very favourable reviews in the York Press.

During the Spring term the 5 – 8 year old groups will be working towards a new production which will take the audience on a backstage tour around the theatre before we close where they meet ghosts from the theatre's past. A time capsule will also be buried as part of the Capital Project. And the 14 – 16 year olds are starting to rehearse for a production called **In my Father's House** which will be performed in Fairfax House while the theatre is closed.

Many Youth Theatre groups are now having their weekly sessions at the National Railway Museum as we start the York Theatre Royal residency at the museum. This national collection will be the stimulus for new youth theatre work across the year.

Youth Theatre groups have become involved in fundraising for the Capital Project at York Theatre Royal. They created a creative and playful "Fete" in the De Grey Ballroom with a variety of events including the chance to dress up in the **Youth Theatre Fun Photo Booth**, the **Big Youth Theatre Auction**, a **Cake Roulette** and a **Human Fruit Machine!**

### **Outreach and Community Youth Theatres**

In addition to the regular Youth Theatre sessions run in the De Grey Rooms we have also introduced new sessions aimed at specific groups both in community settings and at the theatre.

A new Access All Areas Group has been developed over this period and has been oversubscribed with diverse young people, many of whom have been specifically targeted as 'hard to reach'. The group meets on a weekly basis, and took part in the TakeOver Festival. Access All Areas volunteers delivered an exciting, inventive week, jam packed with an eclectic mix of dance, comedy, theatre and music including brand new work by emerging artists. The team also worked in partnership with the York organisation Access To Music, to provide a platform for young musicians to perform to audiences in the café bar. The Access All Areas volunteers will now be working towards next year's community production at the National Railway Museum (NRM).

#### 4. Provide educational activities related to each main house production, including special matinees, talks, teachers' packs, workshops and visits to schools

##### Early Years

Early Years work continues to be as popular as ever with regular weekly activities with **Storymakers** for 3-5 years olds, **Singamajigs** for 1 – 4 year olds and **Sing and Sign** for babies from 6 months old.

##### Schools

As always we are working with schools on many different projects.

The new school year confirmed seven long-term, cross-curricula relationships with York schools including, Knavesmire, Joseph Rowntree and St Olave's.

Additionally as part of the Learning and Performance Network run in conjunction with the Royal Shakespeare Company and York High School as the Hub school we are working with seven cluster schools: Acomb primary, St.Barnabas CE primary, Poppleton Road primary, Woodthorpe primary, Westfield primary, Applefields School (specialist school for cognition and learning) and Joseph Rowntree school. This relationship culminates in a schools festival at York Theatre Royal in March 2015.

The International Centre for Arts & Narrative, a partnership project with York St. John University has delivered its first term of free arts workshops to schools and community groups using a range of artistic disciplines including theatre, music, dance, storytelling, poetry, visual art and film. These are held regularly in the De Grey Rooms and support teachers in using the arts to encourage the creative imaginations of young people. New techniques and approaches to learning are explored in these workshops. This has been made possible through new funding through the Arts & Humanities Research Council (AHRC). Schools who have regularly taken advantage of these stimulating sessions include Badger Hill, Hambleton, St George's, Cawood, Applefields, Knavesmire, Pocklington and Kirkbymoorside. This service for schools will continue for the next academic year and beyond.

Additionally through the AHRC Collaborative Doctoral Award fund we have jointly appointed a storyteller who will be working in the city with students for the next 3 years.

During the Autumn term she has run storytelling lunch times clubs with teenagers, and has done teacher training at York High.

#### **5. Provide a range of activities to engage older people in activities connected with the Theatre**

The new initiatives for older people that we introduced in the last year continue and include Spotlight talks and a Playreading Group. The Friends of York Theatre Royal continue to offer opportunities for older people to volunteer to support the work of the theatre. During this period the Friends have been fundraising for the York Theatre Royal Capital project. Friends and volunteers continue to part of the welcome team for audiences and participants.

We continue to offer two Adult Acting classes on a termly basis that are consistently over- subscribed.

#### **6. Develop The Studio programme promoting new and culturally diverse work: using the space to provide opportunities for local voluntary arts organisations and to develop the creative infrastructure of the city.**

The Studio Theatre programme between September 2014 and January 2015 included 19 different productions.

This included work for all ages with professional, community and novice companies and players.

In the mix this Autumn was our own production of *The Princess & the Pea* for 3-7 year olds that performed to an audience of over 1,500, this included Primary School groups and families.

Other productions produced by York Citizens Theatre Trust included two new plays, **The Restoration of Nell Gwynne** and **Helver's Night**. The latter a new translation of a Polish play.

The TakeOver Festival team of young people programmed a huge variety of performances from spoken word to offbeat comedy and from physical theatre to classic drama. An opportunity for new artists and companies to showcase their work in York.

The York 50+ Festival also produced a show as part of its activity to encourage people over the age of 50 to be creative and have fun.

## **7. Provide student placements and careers advice to support the development of a strong local creative sector**

We have had a range of placements across this period.

We worked with a new intake of young people between the ages of 13 and 25 for the TakeOver Festival. These placements for around 100 young people take many forms. Some are mentoring placements with members of staff over a nine month period, the young people formed their own self-governing Board to manage the initiative and some young people worked with the theatre on a one week intensive placement to support the Festival week. The aim of the initiative is to offer many different points of entry and levels of commitment for young people into the theatre.

A further 6 student placements were offered and taken up during this period. This included a Design Assistant and Assistant Director on **Helver's Night** and an Assistant Director on **Betrayal** and **The Restoration of Nell Gwynne**.

We continue to offer short placements for school-age children throughout the year. These are always over-subscribed. These are offered through the normal carousel placements.

We offer an advice surgery for young people wishing to explore pathways into a career in theatre. We support young people to achieve an Arts Award during any contact with the theatre.

## **8. Develop the De Grey Complex, along with the Theatre, as a creative production hub for the city**

The De Grey Complex continues to be a busy hub for different creative companies and activities.

Resident in De Grey House are 3 creative companies in addition to York Citizens Theatre Trust, they include Aesthetica who publish an international culture magazine and manage the York Short Film Festival, Pilot Theatre Company and The Society of Ticket Agents and Retailers, a national agency.

The De Grey Rooms and House continue to offer creative production facilities for both the professional and voluntary arts. Companies using the spaces included tutti frutti, Flying Cloud Theatre, The Flanagan Collective, Telling Tales Theatre Company, Pilot Theatre, TongueTied,

Mud Pie Arts, Ensemble Theatre Company and Bad Apple Theatre Company.

York College continue to hold most of its performing arts teaching sessions in the De Grey Rooms.

The De Grey Complex continues to host events and functions all year round.

### **9. Work with key stakeholders on the Cultural Quarter developments as well as other developments as appropriate**

York Citizens Theatre Trust has continued its work to develop designs and secure the funding to enable the York Theatre Royal capital project to take place from the end of March 2015. York Theatre Royal will be closed for 8 months and will re-open in December 2015.

During this period the Designs have been completed and a contractor appointed. York-based William Birch will be the main contractor for the project.

York Theatre Royal transferred from the ownership of the City of York Council to York Conservation Trust in January 2015. With this transfer came the commitment from York Conservation Trust to immediately invest funds to repair the roof as part of the capital project in 2015. Further commitments have been made by York Conservation Trust for continued investment over the next 3-5 years to support York Citizens Theatre Trust in improving the building's condition and enabling the Theatre Trust to develop new income streams into the future.

York Citizens Theatre Trust has negotiated a residency at The National Railway Museum during the closure period at York Theatre Royal. New funding has successfully been sourced from the Arts Council's Grants for the Arts to support this project. Theatre activity during this residency will include a new Community Play, involving up to 500 York Citizens. It will take the story of the Railways in York as its inspiration.

York Citizens Theatre Trust has also been part of the ReInvigorate York group working to improve the public realm in Exhibition Square and St.Leonard's Place.

Liz Wilson Chief Executive

York Citizens Theatre Trust

13 February 2015.

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**Learning & Culture Overview & Scrutiny Committee 24 February 2015**  
Report of the Assistant Director, Governance & ICT

**Update on Implementation of Recommendations from Previously Completed Scrutiny Review on Careers, Education, Information, Advice & Guidance**

**Summary**

1. This report provides Members with a second update on the implementation of the recommendations arising from the previously completed scrutiny review of Careers, Education, Information, Advice & Guidance (CEIAG). Members are asked to sign off all those now considered fully implemented.

**Background**

2. In September 2012, in response to a scrutiny topic proposed by Councillor D'Agorne, the Learning & Culture Overview & Scrutiny Committee received a report detailing national and local developments in the provision of careers education information and guidance (CEIAG) to young people in schools and colleges.
3. In January 2013, the Committee received an update on the national developments, together with information on a recent thematic review into CEIAG carried out by The Office for Standards in Education (OFSTED) which had included visiting two schools in York. Initial feedback from OFSTED confirmed they were impressed with the collaboration between the schools and the Local Authority, in relation to CEIAG. However, the Committee recognised that if the provision of careers education differed between all schools in York, the conclusions from the OFSTED review would not represent the full picture. They therefore agreed it might be sensible to also look at the collaboration between 1 or 2 other schools and the Local Authority, in relation to CEIAG.
4. The Committee agreed to set up a Task Group to carry out the review on their behalf and agreed the following remit for the review:

*'To assess the standard of CEIAG for young people in York, and where appropriate identify improvements'*

5. Over a series of meetings the Task Group gathered evidence in support of the review and their draft final report was presented to the Learning & Culture Overview & Scrutiny Committee at a meeting on 18 September 2013. All the review recommendations were subsequently approved by Cabinet in November 2013.
6. In July 2014 this Committee received its first update on the implementation of the approved recommendations and agreed to sign off Recommendations (i) – (iii). The remaining recommendations were not signed off for the following reasons:
  - Recommendation iv - officers were still developing the framework.
  - Recommendation v – the Committee requested an assessment of the adjustments in statutory duties.
  - Recommendation vi – feedback was requested on the ongoing work to actively build stronger links between schools and employers.
  - Recommendation vii – the Committee requested further information.
  - Recommendation viii - work was continuing to look at ways to improve the provision.
  - Recommendation ix - officers were still exploring ways to work with schools and colleges.
  - Recommendation x - the Committee requested a copy of the letter and feedback on the results
7. The Committee also requested a further implementation update in 6 months time.

### **Consultation**

8. The council's Youth Support Service Manager has provided the further update information at Annex A.

### **Options**

9. Members may choose to sign off any individual recommendation where implementation has been completed, and can:
  - a. request further updates and the attendance of the relevant officers at a future meeting to clarify any outstanding recommendations relating to the above review or;
  - b. agree to receive no further updates on this review



**Council Plan 2011-15**

- 9. Whilst the review did not directly support the priorities within the Council Plan 2011-15, it did support a recommendation within the Children & Young People’s Plan made by young researchers that asked for careers information and advice to be age appropriate, and for increased links between businesses and education.

**Implications**

- 10. There are no known Financial, Human Resources, Equalities, Legal, ITT or other implications associated with the recommendation made in this report.

**Risk Management**

- 11. In compliance with the Council’s risk management strategy, there are no known risks associated with this report.

**Recommendations**

- 12. Members are asked to note the contents of this report and
  - i. Sign off all recommendations that have been fully implemented.
  - ii. Agree whether a further update report is required in 6 months time.

Reason: To raise awareness of those recommendations which are still to be fully implemented.

**Contact Details**

<b>Author:</b> Melanie Carr Scrutiny Officer Scrutiny Services 01904 552063	<b>Chief Officer Responsible for the report:</b> Andrew Docherty Assistant Director, Governance & ICT 01904 55
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**Report Approved**  **Date** 13 February 2015

**Wards Affected:** All

**For further information please contact the author of the report**

**Background Papers:** None

**Annexes:**

**Annex A** – Update on CEIAG Scrutiny Review Recommendations

**Annex B** – Copy of letter sent to all year 11 leavers in July 2014

**Report Abbreviations:**

CEIAG - Careers, Education, Information, Advice & Guidance

OFSTED - Office for Standards in Education

Recommendations as approved by Cabinet on 5 Nov 2013	Implementation Status as of July 2014	Implementation Status as of February 2015
<p>iv. Develop some form of CYC charter mark that can be awarded to schools that meets the criteria recommended above (following the publication of the forthcoming report on the recent Ofsted review referred to in paragraph 4 above).</p>	<p>The Local Authority has developed a “Prepared for the Future framework” self evaluation toolkit which enables schools to benchmark themselves against statutory guidance and nationally recognised frameworks.</p> <p>This self evaluation toolkit provides a more accessible and achievable framework for secondary schools, given the increasing demands on school time, resources and budgets.</p> <p>7 secondary schools out of 9 have engaged in this process which has enabled the Local Authority and schools to identify and share good practice.</p>	<p>All secondary schools have engaged with Prepared for the Future Framework. It is showing variations in practice and quality in the delivery of CEIAG through the curriculum and the availability of individual careers advice to young people.</p> <p>Currently, there is no appetite on the part of schools to work towards a form of CYC charter mark unless it has currency to national frameworks.</p> <p>We will work with the National Careers Service to adopt a charter mark linked to the nationally recognised quality mark and will challenge and support schools to work towards when they fulfil the local framework , possibly from September 2015</p>
<p>v. Each young person should be offered a career interview.</p>	<p>To date, approximately 1800 young people from years 9 to 13, the vast majority in year 11, from 8 schools have been offered careers guidance interviews through targeted support and commissioning by schools in</p>	<p>Not all young people are currently being offered individual careers guidance interviews. There is some very good practice but it is not consistent across the secondary schools system.</p>

	<p>2013/14. In addition, schools have their own pastoral systems to guide young people through transitions at age 14, 16 and 18.</p> <p>Due to the changing statutory duties of secondary schools and the Local Authority and reductions in staffing and capacity in 2013/14, the Local Authority will offer targeted 1 to 1 careers guidance and support to all young people with special educational needs and disabilities (SEND), looked after children (LAC) and those identified by the schools as disengaged from education from September 2014.</p> <p>For the majority of children and young people for whom careers guidance is the responsibility of secondary schools, they have been provided with a list of approved providers including freelance careers advisers and careers companies with a good local track record.</p>	<p>The Local Authority (LA) works with all secondary schools in York to support young people at risk of Not in Education, Employment or Training (NEET) focusing on children and young people with special needs, those looked after by the Local Authority (LA) and those with attendance issues. These young people are offered individual careers guidance. All young people at Applefields and Danesgate are offered individual careers guidance and support.</p> <p>In relation to secondary schools and their duty to provide careers guidance, 3 secondary schools employ their own careers adviser and 1 buys it from careers guidance provider. The 4 schools use various systems to prioritise or target young people but also offer careers guidance to any young people from year 8 or 9 and year 11 who request it.</p>
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		<p>One school commissions work to develop the employability skills of targeted young people, 3 schools are considering commissioning careers guidance during the next academic year whilst 2 have no plans to employ their own careers adviser or commission such provision, using existing pastoral systems to offer guidance and working closely with post 16 providers.</p>
<p>vi. There is a need to provide greater scope for involvement by employers in schools – see paragraph 63 of final report.</p>	<p>The Local Authority is working with headteachers and Learning City York to support schools to deliver their new statutory duties and the Careers Guidance and Inspiration Agenda (see Annex B).</p> <p>We are also working with our respective Local Enterprise Partnerships (LEPs) to secure additional resources. One recent example of LEP involvement includes the production of key sector fact sheets and local labour market information in the Leeds City Region.</p>	<p>There is a lot of activity in this area.</p> <p>Most schools do not use the traditional 2 week block work experience model but use many variations which usually have a focus on a targeted group who are either vulnerable students and more motivated students looking for post 16 employment. Many schools are building strong relationships with employers or use the service brokered by North Yorkshire Business and Education Partnership (NYBEP).</p>

	<p>This strand, however, is an area of some complexity and risk which needs a degree of coordination and individual school take up, while balancing this against constraints that schools may encounter.</p> <p>The Local Authority is working with school leaders and key partners such as the National Careers Service and North Yorkshire Business Enterprise Partnership to ensure that we rise to the challenge of providing young people with high quality contact with employers and employees as envisaged in the new statutory Guidance.</p> <p>We are working with key sector leads such as construction, retail and rail. A recent careers and skills event organised at West Offices in partnership with North Yorkshire Construction Training Group focused on opportunities and career paths into the construction industry, attended by local employers and schools.</p>	<p>We are working with partners including National Careers Service (NCS), NYBEP, York Cares, the universities and colleges to develop a CEIAG Offer which provides a menu of employer activities linked to an agreed framework. This will be in place from September 2015.</p> <p>Employment and skills plans are being written into CYC procurement tenders to ensure that we secure locally targeted employment and training opportunities for residents. Two large contracts will provide opportunities for schools and colleges to get involved with:</p> <ul style="list-style-type: none"> <li>• Community Stadium</li> <li>• Derwenthorpe Housing Development.</li> </ul> <p>Opportunities for work experience will be offered via NYBEP and York College and opportunities for site visits, curriculum projects and visits to schools are available.</p>
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	<p>High quality local and regional labour market information is available to and used by schools to raise occupational awareness amongst young people.</p> <p>In one example, a school has close links with employers including during Ambitions Week which is for all students from year 7-11, in which speakers from various businesses were invited to school. In year 9 there is an activity during an industry day where students set up their own business and make products which they showcase to a panel of judges including local business people.</p>	<p>Following the publication of Lord Young’s “ Enterprise for All” and with support of government funding through Leeds City Region, we are working with school governing bodies to identify an enterprise governor for each school to champion the enterprise and employability agenda.</p> <p>We will be working with all secondary schools to audit existing activity that helps young people to prepare for their future career aspirations and identifying gaps ahead of more funding becoming available across the City Region for schools to bid for to commission new activity.</p>
<p>vii. Schools should ensure that all young people are provided with advice and the necessary support to access vocational options and apprenticeships – see paragraphs 66-68 of final report.</p>	<p>Careers programmes in all secondary schools cover the full range of post 16 options. A booklet published by the Local Authority outlining all post 16 options, is sent to parents of year 11 students annually.</p>	<p>The Steps to Success event was held on Tuesday 21 October 2014. 610 young people attended the event; a 5% increase on the previous year. In total approximately 2,000 people attended the event. 58 exhibitors attended providing information on progression routes.</p>

	<p>This is supported by well attended post 16 taster days (see ix) and the annual Steps to Success event at York Race Course where over 1000 parents and young people attend and take up the opportunity to meet providers and receive information about vocational as well as other post 16 options.</p> <p>In relation to the take up of vocational provision, data since 2010 shows a consistent picture with approximately 60% of post 16 students attending vocational courses or a mixture at York College ( eg. a full time Business Technology and Education Council (BTEC) course or BTEC combined with 1 A Level) .</p> <p>Across the city wide post 16 provision over the same period, 40% of young people attend vocational provision as described above. Take up is holding up well against a backdrop of increasing numbers of students achieving 5 GCSEs at grades A* to C including English and Maths.</p>	<p>The York Apprenticeship Offer partnership continues to work well. All 9 secondary schools are engaged and between July 2014 and February 2015 a total of 21 Apprenticeship inputs were delivered in schools. These ranged from full year group assemblies, to more focussed practical sessions on searching and applying for Apprenticeships.</p> <p>Weekly bulletins are sent to all 9 secondary schools and Applefields and Danesgate. The latest vacancies are printed off and displayed on their Apprenticeship noticeboards. In addition young people can now sign up to receive weekly email bulletins via mailchimp (information sent directly to smart phones, so easy to access)</p>
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	<p>This would suggest that students and their parents are making informed decisions based upon the information, advice and guidance that they receive about post 16 options.</p> <p>The local authority has a strong and well coordinated apprenticeship offer which has been delivered in most secondary schools.</p> <p>The higher level apprenticeship fair in February 2014 saw approximately 300 young people and parents attending.</p> <p>The impact is shown by the City of York bucking the trend in apprenticeship take up rising from 4.6% of school leavers in 2011 to 5.5% in 2013.</p> <p>A jobs fair including apprenticeship vacancies took place on 1<sup>st</sup> July with over 30 employers and training providers in attendance and attended by approximately 300 young people and parents.</p>	
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	Castlegate supports young people with post 16 options and advice and refers young people to apprenticeships on a weekly basis.	
viii. CYC website should provide a quick and easy link to careers advice for young people through the Young People's zone at the YorOk website. It could also provide links to other recommended websites – see paragraph 69 of final report.	<p>Quick and easy link to Futures for Me on the Yor-Zone website. Careers search takes you futures for Me, sources of careers advice and links to job vacancies and apprenticeships.</p> <p>We are looking to improve this provision through more effective engagement with social media.</p>	<p>Access to site has been improved including more visible link to careers advice on the Yor-Zone website.</p> <p>The site is very well used including 12,000 hits annually on the job vacancy section.</p>
ix. Taster days for 6th form and college should be introduced and aimed at young people in year 10 – see paragraph 71 of final report.	<p>In January 2014, a coordinated programme of post 16 taster days was organised for young people in year 11, to spend the day at 6<sup>th</sup> forms and York College. The event was successful with approximately 1200 students attending and will be repeated next year.</p> <p>This year we will explore with schools and colleges how this can be delivered for students in year 10.</p>	<p>Taster Days took place on 13<sup>th</sup> and 15<sup>th</sup> January 2015. Preliminary feedback indicates around 1200 Year 11s benefitted from these sessions. Feedback from students and staff is very positive and further refinements for future years have been highlighted. From our four 11-16 schools overall 91% of Year 11s participated in at least one visit.</p>

		<p>Pleasingly 22% of Year 11s in our five 11-18 schools took part to consider progression routes other than staying on in their own school sixth form.</p> <p>Secondary headteachers and college principals will be asked to commit to the city wide Taster Days for 2016 and there longer term future will be discussed. In 2016 we will seek to extend the offer to include Askham Bryan College, York Learning and possibly a range of Apprenticeship training providers.</p> <p>The York 'spine' of information and advice events for Year 11s consisting of (1) Steps to Success (2) Co-ordinated Post 16 Open Evenings and (3) the January Taster Days is a clear model of good practice which we doubt exists anywhere else in England.</p>
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<p>x. At the end of Year 11 a letter should be sent to every young person at their home address that sets out the support services available to them including Castlegate to ensure they are aware of the services on offer, where they are and how to access them – see paragraph 72 of final report.</p>	<p>The Local Authority will write to all year 11 leavers in July 2014 informing them of support services from Castlegate, particularly after GCSE and results.</p>	<p>We wrote to all year 11 leavers in July 2014 informing them of post 16 IAG and support services and how to access them at Castlegate – see Annex B.</p> <p>There was a 24% reduction in young people using Castlegate in August and September 2014 compared to 2013, although we recorded approximately 15 young people who called in saying that they were prompted by the letter.</p>
<p>At the Committee meeting on 22 July 2014, Members considered all 10 approved recommendations and agreed to sign off recommendations i, ii and iii as fully implemented. They requested a further implementation update be provided in 6 months time.</p>		



Connexions @ Castlegate for Young  
People  
29 Castlegate  
York  
YO1 9RN

Tel: 01904 555400

Fax: 01904 555420

E-mail: [mail@29castlegate.org](mailto:mail@29castlegate.org)

Dear

Castlegate services for Year 11 leavers

We hope that you are enjoying the summer break and looking forward to the next stage of your career after completing year 11.

You may be very settled with your plans for this September whether it be college, 6<sup>th</sup> form, an apprenticeship or work based training. However, if you are still unsure about your plans then Castlegate can help with independent, impartial advice, guidance and support to help you make the right choices about your future.

We can also offer support when you receive your GCSE and other exam results, especially if they don't go to plan.

At Castlegate we have lots of information about post 16 options and up to date job and apprenticeship vacancies. A team of trained advisers can also help you with practical advice to help with job search and CVs and applications.

We also offer advice and support with employment issues, benefits, housing, money, health and provide confidential counselling.

Castlegate is open for appointments from 9.30am and for drop-in 1pm to 5.30pm from Monday to Friday.

Please call us for more information telephone 01904 555400, visit our website [www.29castlegate.org](http://www.29castlegate.org) or visit us during drop-in time.

Yours sincerely

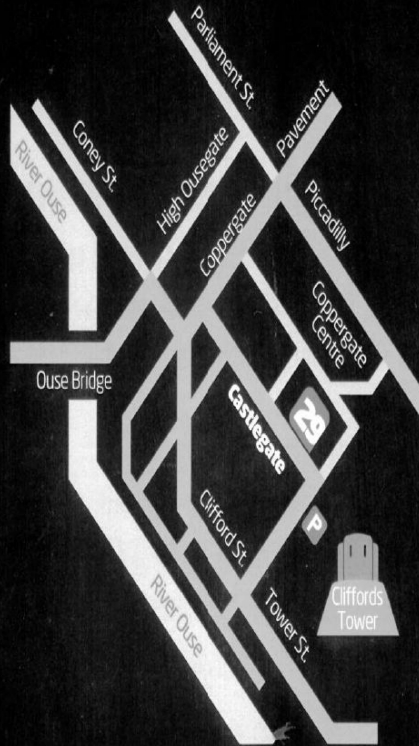
A handwritten signature in black ink that reads "S. Gennery".

Shirley Gennery  
Connexions Practice Manager

- Information
- Advice
- Support
- Counselling
- Work & Learning
- Careers Guidance
- Relationships
- Housing
- Sexual Health
- Money & Benefits
- Rights
- Mental Health
- C Card Point for Condoms
- Pregnancy Testing & Chlamydia Screening

**OPEN TO ALL**

Castlegate values all young adults as equals regardless of their gender, race, ability, sexuality, or any other aspect that makes them who they are.



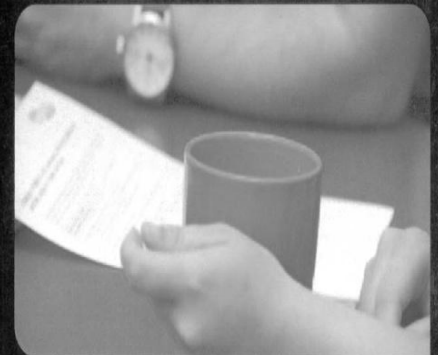
**WHERE TO FIND US**

29 Castlegate  
York YO1 9RN  
Tel: 01904 555400  
[www.29castlegate.org](http://www.29castlegate.org)

**Opening Times**

Monday to Friday 1pm-5.30pm  
Appointments at other times

**Confidential information,  
support, advice and counselling  
to young adults aged 16-25**



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**connexions@Castlegate**



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## **Learning & Culture Overview & Scrutiny Committee**

**24 February 2015**

Report of the Disabled Access Scrutiny Task Group

### **Disabled Access to York's Heritage & Cultural Offer – Draft Final Report**

#### **Summary**

1. This report presents the findings from the recently completed scrutiny review of Disabled Access to York's Heritage & Cultural Offer, and asks the Committee to agree the Task Group's draft recommendations, to enable the final report to be presented to a future meeting of Cabinet.

#### **Background to Review**

2. In April 2014 at a meeting of the Learning & Culture Overview & Scrutiny Committee, Members considered a number of ideas around possible topics for scrutiny review in the 2014-15 municipal year. Cllr Barnes suggested a possible topic on disabled access to York's heritage and cultural offer, and this together with a number of other suggestions were put forward for consideration at the annual scrutiny work planning event held in May 2014.
3. In June 2014 this Committee agreed to proceed with the review of disabled access to and set up a Task Group made up of the following Members to carry out the review on their behalf:

Cllr Julie Gunnell (Chair)  
Cllr Jenny Brooks  
Cllr Fiona Fitzpatrick  
Cllr Neil Barnes (Co-optee)

4. The Task Group met for the first time in early August 2014, and agreed the following review remit:

#### Aim:

To improve all forms of access to York's heritage and cultural offer

Objectives:

- i. To understand legal requirements & identify best practice from elsewhere
- ii. To assess current levels of access for those with a range of impairments
- iii. To identify possible improvements and barriers
- iv. Facilitate the sharing of good practice across York's network of providers

**Introduction**

5. The Equality Act defines disability as 'A physical or mental impairment which has a substantial and long term adverse effect on your ability to carry out normal day to day activities'. The social model of disability uses the term 'disabled people' as a political one. People may have physical or sensory impairments, mental health conditions, or learning difficulties, but they face barriers in daily life because of the way society has developed. They are in essence, disabled by society. For example, a wheelchair user may have a physical impairment, but if buildings are developed with ramps and lifts, they are not 'disabled'. Similarly, if we provide sign language interpreters at meetings, deaf people who use signing are not disabled, but if we do not, they are.
6. Nationally about one in five people live with an impairment or long-term health condition. The population of York is 198,051. According to the 2014 Joint Strategic Needs Assessment for York, 6.6% of the population have a long-term health problem or disability which significantly limits day to day activities, this represents 13,018 people. Additionally, 3.1% of those aged 0-24 have a limitation in day-to-day activities. In 2009, 2,304 people in York were diagnosed as having dementia. By 2015, this number is predicted to increase to 2,708. It is estimated that at any one time there are approximately 170 individuals living with a mental health condition for every 1,000 people aged 16 to 74 years in York. This equates to around 25,000 people experiencing various kinds of mental health conditions ranging from anxiety and depression to severe and enduring conditions including dementia and schizophrenia, (data from 2008). Finally, there are 18,224 self-declared unpaid carers in York, 9.2% of the population. Taken together these statistics represent a significant proportion of the local population who are affected by disability or mental health in some way.



7. In summer 2013, Healthwatch York undertook a survey to look at the discrimination disabled people face in York, predominantly in terms of the attitudes disabled people faced both from service providers (GPs, shop assistants etc.) and the general public. They concluded that disabled people face a variety of discrimination from both service providers and the general public.
8. Beyond the moral and legal perspectives, there is a compelling business case for making an organisation's products and services fully accessible to people with disabilities. For example:
  - A third of people in the UK are disabled or close to someone who is.
  - 10 million disabled people live in the UK with a combined annual spending power in excess of £80 billion.
9. In 2006, the Business Disability Forum<sup>1</sup> and the Royal Association for Disability and Rehabilitation (now Disability Rights UK) undertook a survey into the opinions and shopping habits of disabled customers. What emerged was a picture of informed consumers who will reward good customer service and punish providers who don't make any effort to meet their needs. However, 83% of disabled people had 'walked away' from making a purchase, unable or unwilling to do so. The most important factor was inaccessible premises. Other important factors that discouraged disabled consumers from spending were poorly designed products and staff that were not disability confident, rude or appeared prejudiced.
10. Poor or inappropriate communications was another area that affected spending. Inaccessible websites, telephone systems and printed information were all cited by respondents as reasons they did not make a purchase.
11. Over a third of disabled people said that good disability service was the primary reason for choosing a provider or product. Two thirds chose businesses where they had received good customer service related to their disability. Companies that told disabled people about the accessibility of their products attracted those consumers.

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<sup>1</sup> Business Disability Forum is a not-for-profit member organisation that bringing together business people, disabled opinion leaders and government to understand what needs to change if disabled people are to be treated fairly so that they can contribute to business success, to society and to economic growth.

12. The Business Disability Forum has also developed a communication tool to explain how disability is likely to affect a customer base. These disability profiles provide some basic management information which helps to explain why an organisation needs to be disability-smart. A disability profile can help managers learn how to meet the needs of a wide range of customers and they can be tailored to reflect the reality of any particular business or industry sector. Their UK customer profile for 2014 is shown at Annex A.

## Information Gathered

### Objective (i) - Legal Requirements & Best Practice

13. Disability Law in the UK – The Equality Act 2010  
The Equality Act 2010 is the overarching piece of legislation that protects the rights of disabled people in the UK. It prohibits all discrimination on the basis of a range of characteristics including age and disability. In addition, the Act aims to promote and achieve equal opportunities for all.
14. Prior to the introduction of the Act, duties on service providers towards disabled people had been phased in, over three stages under the 1995 Disability Discrimination Act (DDA):
  - From December 1996 it was unlawful for service providers to treat disabled people less favourably for a reason related to their disability;
  - From October 1999 service providers had to make ‘reasonable adjustments’ for disabled people, such as providing extra help or making changes to the way they provide their services<sup>2</sup>; and
  - From October 2004, service providers had to take reasonable steps to remove, alter or provide a reasonable means of avoiding a physical feature which made it impossible or reasonably difficult for disabled people to use a service<sup>3</sup>.

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<sup>2</sup> This does not place a duty on landlords to make ‘reasonable adjustments’ to their properties.

<sup>3</sup> The *Disability Discrimination (Providers of Services) (Adjustment of Premises) Regulations 2001* (SI 2001/3253) were laid before Parliament in October 2001 and came into force in October 2004. These Regulations were amended twice to take account of changes to the Building Regulations – see SI 2004/1429 and SI 2005/1121

15. The Equality Act 2010 gives rights to people who have, or have had, a disability. 'Disability' covers both physical and mental impairments that have a substantial and a long-term effect on the person's ability to carry out normal day-to-day activities.

A long-term effect is one which has lasted, or is expected to last, at least 12 months or the rest of the person's life (if shorter). Treatment and aids which alleviate or remove the effect of the impairment do not mean a person is not disabled.

16. Progressive conditions are covered, as are conditions that have a substantial effect for short periods but are likely to recur. HIV, multiple sclerosis and cancer are deemed to be disabilities from the date of diagnosis. People with severe disfigurements are also deemed to be disabled by the Act, as are people who are registered as blind or partially sighted with their local authority or an ophthalmologist. People who have had a disability in the past are also protected by the Act. This is the case even if they have now fully recovered.
17. The Act places duties on those providing goods, facilities or services to the public and those selling, letting or **managing premises in the UK**. The Act makes it unlawful for service providers, landlords and other persons to discriminate against disabled people in certain circumstances.
18. People associated with a disabled person and people who are wrongly perceived to have a disability are also protected from direct discrimination and harassment but do not benefit from the duty to make reasonable adjustments.
19. Although current UK equality law says disabled people must receive an equal experience to non-disabled peers, the reality is different. Scotland made disabled access part of its entertainment licensing laws in October 2011 (provision for disabled visitors is now a condition for getting a new alcohol licence), the rest of the UK has no such requirements, and disabled music fans often find themselves excluded from events.
20. Reasonable adjustments – A key aspect of the Equality Act that can impact on organisations is the duty to make reasonable adjustments. A service provider or provider of public functions has a duty under the Equality Act to make reasonable adjustments to prevent a disabled person from being placed at a substantial disadvantage by any

provision, criterion or practice, or a physical feature of premises or the lack of an auxiliary aid.

21. Where this is the case reasonable steps must be taken to remove or alter the feature or provide a reasonable means of avoiding the feature. The Equality Act also covers the provision of information which must be provided in an accessible format.
22. The key provision governing reasonable adjustments for disabled people is in section 20 of the Equality Act 2010 and the explanatory notes to the Act explain the duties of service providers under section 20 – see relevant extract from the Act at Annex B.
23. The duty comprises three requirements which apply where a disabled person is placed at a substantial disadvantage in comparison with non-disabled people:
  - The first requirement covers changing the way things are done (such as changing a practice),
  - The second covers making changes to the built environment (such as providing access to a building),
  - The third covers providing auxiliary aids and services (such as providing special computer software or providing a different service).
24. Section 20 makes it clear that where the first or third requirements involve the way in which information is provided, a reasonable step includes providing that information in an accessible format.
25. It sets out that under the second requirement, taking steps to avoid the disadvantage will include removing, altering or providing all reasonable means of avoiding the physical feature, where it would be reasonable to do so. It also makes it clear that, except where the Act states otherwise, it would never be reasonable for a person bound by the duty to pass on the costs of complying with it to an individual disabled person.
26. The Equality Act 2010, as with the DDA before it, cannot require anything to be done that would contravene another piece of legislation. For example, where a service provider must get statutory consent to a particular alteration, including listed building or scheduled monument consent, and that consent is not given, the Equality Act 2010 will not have been contravened.

However, a service provider would still need to take whatever other steps under the Act were reasonable to provide the service.

27. Planning Guidance on Disabled Access to Historic Buildings

Planning Policy Guidance Note (PPG 15) issued by the Department of the Environment, Transport and the Regions makes it clear that:

*'It is important in principle that disabled people should have dignified easy access to and within historic buildings.*

*And that with a proper approach, it should normally be possible to plan suitable access for disabled people without compromising a building's special interest.'*

28. Reconciling the aims of improving access with the needs to conserve the importance and significance of the historic building is the next step. Depending on the sensitivity and importance of the building, owners of historic buildings are advised to seek the advice of the local authority Conservation Officer, English Heritage, the relevant National Amenity Society, and the local Access Officer to ensure that proposals for alterations protect or enhance the historic building, and are of a suitable quality and effectiveness for people with disabilities to justify the alteration.
29. It is not envisaged that every building will have ramps and lifts everywhere, for all sorts of reasons, and on occasions a strategic review of the services provided might be useful. For example if several premises are owned, would it be acceptable and desirable if one venue is easier to adapt and the others left unaltered? Economic constraint is another aspect of reasonableness.
30. Where physical barriers cannot apparently be overcome by making alterations, the Equality Act 2010 allows for alternative means of providing a service (for example such as by mail order or a 'virtual' visit or an alternative venue) or using an alternative route into the building, or providing personal assistance, or ensuring good access to services is provided on the ground floor. These may be referred to as managed solutions. Part M of the Building Regulations 2000 requires the submission of an Access Statement which will explain why the historic specialness of the building requires a deviation away from standard solutions. The Society for the Protection of Ancient Buildings<sup>4</sup> (SPAB) believes this flexible approach is to be welcomed:

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<sup>4</sup> The Society for the Protection of Ancient Buildings was founded by William Morris in 1877 to counteract the highly destructive 'restoration' of medieval buildings being practiced

*“It is our experience that most buildings can be successfully and effectively altered to provide reasonable access, but this does require a good understanding of both historic building conservation and how to accommodate the needs of people with disabilities. For example, you may have to look at good effective lighting which helps visually and hearing impaired people; sensible choice of colours and tones need not be garish to provide effective contrast to aid identification of possible hazards and changes in levels make the environment safer; automatic door openers may avoid alterations to building fabric being required; and we like to emphasise that beautifully designed and manufactured handrails, for example, and any other additions and alterations, keep our traditional arts and crafts alive.”*

31. The View of English Heritage

English Heritage updated its booklet ‘Easy Access to Historic Properties’, in December 2012 to take account of the 2010 Act and changes to planning legislation – see copy at Annex C. The booklet is designed to help those who own, manage, or are professionally concerned with historic properties to strike a balance between conservation and access.

32. In addition, the English Heritage website contains the following statement on the need to reconcile access requirements without compromising the nature of historic buildings:

*‘Historic buildings, landscapes and monuments, the physical survivals of our past are protected for their sake and for ours. They are irreplaceable but sometimes they need to be changed. Appropriate or sensitive alteration will have due regard for what it is that makes a particular building special or significant. In most cases access can be improved without compromising historic buildings. The key lies in the process of information gathering about the building, understanding its significance and vulnerabilities and knowledge about the needs of people with disabilities.’*

33. English Heritage also provides information on the process through which service providers, including owners of historic buildings that are open to the public, should develop an “access strategy” – see Annex D.

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by many Victorian architects. Today it is the largest, oldest and most technically expert national pressure group fighting to save old buildings from decay, demolition and damage. The Society has a statutory role as adviser to local planning authorities, and must be notified of listed building applications that involve total or partial demolition.

34. Best Practice - Cinemas & Theatres

Cinemas and theatres are popular places for spending leisure time. Most cinemas, especially modern multi-screen types, are able to provide good facilities for people with disabilities, whilst some theatres are more restrictive due to the age and fabric of the buildings. However many disabled people feel that as a disabled customer they often fail to receive the same service as a non-disabled person.

35. In many cinemas and theatres only certain auditoriums are accessible to people with mobility difficulties. This has the effect of leaving disabled people with fewer options and facing discrimination. Disabled people often also have to call cinemas and theatres in advance to find out where performances are taking place which means they cannot make spontaneous choices.

36. Trailblazers, a nationwide organisation of 190 young disabled and non-disabled campaigners<sup>5</sup> reported in 2009 that wheelchair users often had no other option but to sit at the front of the auditorium or stage. This means that they had to lean back to watch the screen or stage - a position that proved tiring and painful for someone with a muscle-wasting condition - rather than straight ahead as a person seated further back in the auditorium would. They also told of being labelled a 'fire risk' by staff members at cinemas, when they transferred from their wheelchairs into a cinema or theatre chair to avoid sitting in an area of the auditorium that caused discomfort.

37. Trailblazers also found it was common for wheelchair users to be refused entry to theatres unless they were joined by a non-wheelchair user and seated in an expensive area, thus being forced to buy a more expensive ticket (although receiving a concession for the PA/carer).

38. The cinema industry however has been commended on its use of the Cinema Exhibitors Association card (CEA) which gives concessionary tickets for carers and personal assistants across the cinema industry. The Cinema Exhibitor Association introduced their card scheme 10+ years ago to assist cinemas in meeting their duties under the Equality Act 2010. It was devised by the CEA in consultation with its disability advisers and representatives from several disability charities.

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<sup>5</sup> Trailblazers are part of the Muscular Dystrophy Campaign, the leading UK charity focusing on all muscle disease. They aim to fight the social injustices experienced by young people living with muscle disease and ensure they can gain access to the services they need.

39. All of the major cinema operators and many smaller cinema companies in the UK accept the CEA card, including all of the cinemas in York. Whilst it is not the only way cinemas can provide assistance to disabled customers, it is widely recognised and accepted as good practice. Most cinemas hold application forms at the box office but they can also be downloaded from The Card Network website: [www.ceacard.co.uk/](http://www.ceacard.co.uk/)
40. The card entitles the cardholder (the person with the disability) to a free ticket for someone to accompany them when they visit the cinema (when one full price ticket is purchased). The CEA card is valid for 1 year, and the cardholder can visit the cinema as many times as they wish during the year. To apply, applicants need to supply a passport-sized photo with their application to appear on the Card, and submit proof to show that they meet one (or both) of the following criteria:
- Be in receipt of Disability Living Allowance, Attendance Allowance or Personal Independence Payment.
  - Be registered blind.
41. Best practice for cinemas suggests the following should be made available:
- Audio description in films for the blind and visually-impaired. This is where the action, scene changes and the actors' body language is described in addition to the dialogue. You listen to the commentary through a lightweight headset. Some cinemas have the system for all their screens which means that every screening of a film can be audio-described. At others, audio-described films are indicated in listings on the cinemas websites.
  - The layout of the cinema complex and other information in Braille and programme times available as a recorded message over the telephone.
  - Induction loops for deaf and hearing-impaired customers (infrared, induction or both). Many cinemas also run subtitled screenings on a regular basis. This is usually indicated in listings.
  - A designated area for wheelchair users. Wheelchair users or those with restricted mobility are encouraged to contact a cinema in advance to check their facilities.
  - For those with an Assistance dog, most cinemas ask to be informed in advance so that they can allocate the most appropriate seating.



42. The 'Your Local Cinema.com' website has country-wide listings of audio-described screenings and subtitled screenings in cinemas, as well as available audio-described DVD titles. Full details of the facilities offered by York's cinemas are given in Annex E.
43. Best Practice - Live Music Venues  
The charity 'Attitude is Everything' improves deaf and disabled people's access to live music by working in partnership with audiences, artists and the music industry.
44. Having begun as a pilot project in 2000, they are now a fully independent charity and part of Arts Council England's National Portfolio of Organisations. Their aim is to encourage events producers to go beyond the legal obligations set out in the Equality Act and implement best practice, providing a fair and equal service to their deaf and disabled customers.
45. They support the music industry to understand Deaf and disabled people's access requirements at music venues and festivals by building equality into the strategic process using a Charter of Best Practice. The ethos of the Charter is that Deaf and disabled people should be as independent as they want to be at live music events and over 90 venues and festivals have already signed up.
46. They also created a Charter Toolkit in order to bring together all of the knowledge, guidance and best practice advice they had developed from working with the live music industry. It was designed to guide event organisers through a wide range of accessibility topics, and ultimately enable organisations to be awarded the Charter and improve their accessibility.
47. In 2014, as part of their initiative to help live music venues adapt, the charity produced its latest 'State of Access' report, a comprehensive study based on 228 mystery shopping reports, 159 from venues and 69 from festivals, 40 questionnaires, and 13 interviews collated between April 2011 and March 2013. The study had to exclude establishments where the mystery shoppers couldn't even enter the building. Not just access but also the attitude of staff was rated. – The detailed findings can be viewed at:  
<http://www.attitudeiseverything.org.uk/resources/publications/state-of-access-report-2014>

48. Best Practice - Tourist Attractions

Visit England's Visitor Attraction Quality Assurance Scheme, through its network of regional assessors, boasts an incredible reputation for instigating, modifying and shaping change to the customer experience at visitor attractions across England.

49. Signing up to its National Code of Visitor Attractions is the first step in its accreditation process. The 15 simple points of the Code, compiled by an independent panel of industry experts, are the basic fundamental actions that all well managed attractions should already be following. It acts both as a checklist but also provides a certificate for display in a public area, preferably at admission point. The Code confirms that a site is recognised by VisitEngland as a visitor attraction and that it fulfils the basic requirements of a recognised industry standard. The code also includes what is expected of an attraction in regard to addressing the needs of disabled visitors – see copy of code at Annex F.

50. Specifically in regard to wheelchair users, a new study published in April 2014 by disability charity Vitalise<sup>6</sup>, revealed the best and worst UK tourist attractions. The study rated 85 of the nation's most popular destinations by wheelchair access, number of disabled toilets and disabled parking spaces, as well as additional wheelchairs and disability and carer concessions. The tourist destinations that made top place, with equal ratings for the best access for disabled visitors included York's National Railway Museum. There were no other York attractions in the Top 10 best and worst ranking attractions.

**Objective (ii) – Current Levels of Access**

51. At their meeting in August 2014, the Task Group considered a report detailing the Access information currently being made available on the city's heritage and cultural providers' websites – see Annex E.

52. They also received information on **DisabledGo** who are the leading providers of access information for disabled people in the UK, featuring over 120,000 places of interest. Their aim is to provide information so that a disabled person can make up their own mind whether somewhere is right for them, before they get there.

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<sup>6</sup> Vitalise is a national charity providing short breaks and holidays (respite care) for people with physical disabilities and carers.

Every single venue featured by DisabledGo is visited in person by one of their own specialist surveyors, and they cover any type of venue that a member of the public would visit, including:

- Council offices
- Parks
- Leisure and sports centres
- Stadiums and sports grounds
- Tourist Attractions
- Colleges
- Restaurants
- Libraries
- Cinemas
- Hotels
- Hospitals
- Pubs

53. There are currently 980 York venues on the DisabledGo website – see list at Annex G. DisabledGo inspects 25 additional York venues per year as part of their contract arrangements with the Council. The Head of Communities and Equalities is responsible for monitoring the contract and commissioning those reviews. Venues can be suggested by community groups, Equality Advisory Group and CYC officers e.g. the Sport and Active Leisure Team, and the findings are uploaded onto DisabledGo's website - there are currently approximately 250 entertainment, leisure and culture venues in York listed on their website.

### **Consultation**

54. In order to assess the current access to York's many heritage and cultural venues against the best practice information they considered, (review objectives i-ii), the Task Group agreed to carry out a number of consultation meetings.

55. In October 2014, the Task Group held a consultation event with a number of interested individuals and representatives from the following user-led organisations:

- York Access Group
- York CVS
- Healthwatch
- York Independent Living Network

56. Recognising the Council has no powers to make external providers improve their access arrangements, those attending the event asked the Task Group to consider how best to build peer pressure amongst York's providers to encourage improvements across the board. They also raised the following issues for Task Group's consideration:

- Access to cultural and heritage offer should start with the ability to access the city centre via public transport.

Issues with buses not allowing wheelchairs on board; drivers not asking those with pushchairs to collapse them to allow space for wheelchairs, drivers not lowering the bus ramp etc

- There is a need to improve understanding and raise awareness of the needs of disabled people – improved training for public transport staff and staff at heritage and cultural venues, shops, cafes, restaurants etc.
- In regard to the 'Residents First Weekend', it would be helpful if information on the weekend was provided well in advance to all of the appropriate disability organisations, to allow them to raise awareness of the event to increase the number of disabled patrons taking advantage of the offer. A query was also raised about whether any signed tours were available during the Weekend.
- In regard to the city's heritage and cultural providers, they should be encouraged to consider their access arrangements for:
  - Those with sight/hearing impairments,
  - Those with a range of mental health needs e.g. Dementia etc
  - Those with Autism
  - Those with physical disabilities e.g. those using mobility scooters, wheelchairs etc
  - The elderly
  - Those with learning difficulties or learning disabilities
- The city's heritage and cultural providers should also be encouraged to improve the access information on their websites
- There should be no need to ring a venue first before deciding whether or not it is an accessible venue to visit.
- It would be good to raise the profile of disabled people. Perhaps by celebrating the lives of disabled people in a way that is specific and relevant to York, e.g. by perhaps marking disability history month, or international day of disabled people, or by marking the life of any disabled York residents (past or present).
- It was suggested that more public seating was required within the city centre of the right type to aid sitting and standing. Also that there was insufficient number of public toilets in the city centre. Both issues being something that some disabled people need to consider when planning an outing.

- A number of specific issues were raised around unmarked steps, lack of labelling, increased intolerance by drivers and cyclists, not enough large print or audio provision and signage at the wrong level.
- The need for improvements at West Offices was raised – issues raised around signage, lack of large print, verbal announcements, staff training etc.
- Information was provided on North Yorkshire's 'Safe Places' scheme, where a venue can display a symbol on their window which identified the venue as somewhere people with learning difficulties can go to ask for help if they are lost or maybe want more information etc. York Independent Living Network confirmed that have been talking to the Council, Inclusion North and North Yorkshire Police about introducing the Safe Places scheme in York as part of their 'Keeping York Safe for Disabled People' project.
- The economic value of disabled tourists was also discussed, and all recognised that improved accessibility for disabled people benefitted other people too e.g. ramps are useful for young families with pushchairs and older people.
- The attendees questioned how best to address the challenge of 'historical building' inaccessibility, recognising that many of the heritage and cultural venues may be restricted in what they can change.
- The organisations present questioned what they could do to contribute e.g. when a venue is being refurbished it is important to use focus groups and qualified assessors, rather than random volunteers. An example was given of where an organisation had relied on the words of a wheelchair user telling them that it was alright not to have automatic doors as they would always have someone with them to open the doors. However when they started getting complaints from people, they then had to spend quite a bit of extra money to install an automatic door and a path leading to it.

57. Finally, the attendees questioned what information was being provided by tourist information on the accessibility of tourist attractions in York.

58. With this in mind, the Task Group held a meeting with Visit York in early November 2014, to gather their views on improving accessibility, and to share with them what they had learnt from their consultation event.

59. The Head of Visit York, the Marketing Manager and the Visitor Information Centre Manager attended the meeting, and confirmed that some time ago Visit York carried out an exercise with DisabledGo, focussing on Museums and Galleries etc to assess the accessibility of those venues. However they accepted that the information produced was now likely to be out of date and therefore ready for refreshing.
60. They confirmed that Visit York:
- Relies on organisations to provide information on their facilities for the disabled. Also that the number of Hotels and bed and breakfasts etc attempting accreditation is low in York, perhaps due to the criteria being very stringent which may be putting a lot of organisations off.
  - Requires no particular Access standards, but does require Health & Safety standards.
  - Often receives requests from users about Access, but they do not always feel qualified to offer advice on behalf of the organisations they represent. Instead it is their practice to direct visitors to the information on individual organisation's websites.
  - Reviews the information in their database on an annual basis. However they have some restrictions in their IT software which limits the amount of information they can hold
  - Is not always aware of the access issues affecting specific venues, and they recognise some buildings will be very hard to adapt
61. The Head of Visit York highlighted Lincoln Castle as an example of best practice, which is currently being refurbished and will include state of the art access facilities. The Castle, owned by Lincolnshire County Council, was built in 1068 and has housed the Magna Carta since 1215. The refurbishment works includes providing full access to all parts of the building for disabled visitors including a lift to the walls that will enable disabled visitors to access the wall walk.
62. Information was also provided on a Visit England pilot scheme called 'Access for All'. It was confirmed that 10 cities had already been given pilot status (including Nottingham and Lincoln) and Visit England were currently looking for more.

It was also confirmed that Visit York had already submitted their interest in participating (subsequently, the Task Group learnt that that Visit York had been unsuccessful in the submission).

63. Overall, the Head of Visit York expressed the view that two things were needed – to find out what is happening already and to educate organisations/businesses on how they can do more. She confirmed that Visit York would be happy to facilitate a training event for businesses/ organisations to help raise awareness and encourage improved standards.
64. In December 2014 the Task Group met with a representative of 'DisabledGo' – see paragraphs 51-52 above, and received a presentation on how easy it is to access information through their website. Users can choose from a wide range of access and language options. He also provided information on the 'AccessAble app' and the best practice guides they can provide through the council's contract.
65. The App is currently being commissioned by many Local Authorities to help promote their towns and cities better to disabled residents and visitors.
66. Both the best practice guidance and the App come at an additional cost. An App costs £5,000 per App per platform and it takes approximately 6 weeks for an App to be completed. There is also an annual fee of £1,000 for maintenance and updates per App. As the Council can currently develop for iPhone and Android devices, an App for both would cost £10k for set up and £2k annual maintenance (negotiable if the Council chose to introduce Apps for both platforms). The cost per venue for best practice guidance would be £100 and would take approximately 2 weeks to create for each. However, the Head of Communities and Equalities has confirmed there is currently no funding available for introducing the Apps and best practice guidance.
67. The Council's current contract with DisabledGo comes to an end in 2016. The Head of Communities & Equalities has not to date carried out any research on other providers of access information for disabled people, but would look to do so as part of a procurement exercise towards the end of the current contract.

## **Analysis**

68. Objective (i) – Legal Requirements & Best Practice

In considering section 20 of the Equality Act 2010, the Task Group noted the three requirements detailed in paragraph 22. Recognising that some of the heritage/cultural offer in York are based in historical buildings, they accepted that there would be limitations to the alterations that could be made due to other pieces of legislation e.g. listed building consent. However, they agreed that those providers should be encouraged to be more innovative in finding ways to provide access to their offer.

69. The Task Group noted English Heritage's views on balancing conservation and access. They questioned if any of the heritage and cultural providers based in an historical building in York, had developed an 'Access Strategy' and have an Access Plan in place (as described in Annex D).

70. In regard to best practice, the Task Group was pleased to note that all York cinemas accepted the CEA card (see paragraph 38) and that the National Railway Museum had made top place in the 2014 study of the best and worst UK tourist attractions conducted by the charity Vitalise (see paragraph 50). On further investigation the Task Group learnt that the study had looked specifically at the top 100 most visited attractions in the UK and that the only other venue in the York area that appeared in that list was Castle Howard.

71. They questioned whether the Charter Toolkit created by the Charity 'Attitude is Everything' could be adapted for use in theatres, and agreed York's live music venues should be encouraged to sign up to the live music industry's Charter of Best Practice (see paragraphs 44-45). They were also pleased to note the good work of Visit England in shaping improvements to the customer experience at visitor attractions, and agreed it would be good if York's heritage and cultural venues signed up to the Visit England's national code (see paragraphs 47-48).

72. Objective (iii) – To identify possible improvements and barriers

The Task Group noted all of the feedback provided at their consultation event held in October 2014, and agreed with many of the points raised. Whilst not strictly within the remit of the review, they acknowledged that more could be done to reduce the barriers identified by the consultees which were preventing disabled people from accessing the city centre generally.



They noted the problems with public transport, the design of some of the public seating in and around the city centre (particularly close by to heritage and cultural venues), and the lack of disabled toilets in convenient locations. They also acknowledged the need for ongoing training for public transport staff and staff at heritage and cultural venues, shops, cafes, restaurants etc and appreciated the offer made by Visit York to facilitate a training event.

73. In regards to the Residents First Weekend, the Task Group agreed that disability organisations should be given advance warning and that all providers should be encouraged to provide a full range of their accessible services and aids during that weekend, to enable as many disabled people as possible to take advantage of the offer.

They noted the request for improved access information on the website of the heritage and cultural venues. Having assessed that information (as detailed in Annex E), the Task Group noted that in some cases the information had been easy to find and in others it had not, which highlighted the difficulties faced by potential patrons. In a few instances, the information provided was minimal and patrons were recommended to ring the venue to discuss their access requirements before attending. They agreed with the consultees that ideally a disabled person should not need to do that. The Task Group were also disappointed to note that in one or two cases there was no access information provided on a venues website. Having considered the mixed quality and quantity of information provided on provider's websites, they agreed the city's heritage and cultural offer would benefit from some standards in approach, which in turn would lead to greater confidence in the information provided online and empower disabled people to make informed choices without drawing attention to their condition.

74. The Task Group questioned whether Visit York could improve the level of support it gave to disabled visitors, suggesting that perhaps they could encourage providers to achieve an improved standard of access information and signpost visitors to where they can find that information.

75. Objective (iii) – Possible Improvements & Barriers

The Task Group was disappointed that Visit York had been unsuccessful in its submission to participate in the Visit England pilot scheme (see paragraph 61). They also liked the idea of introducing a Tourism Award to encourage member organisations to make their venue more accessible, agreeing it would be good if it were a user-group nominated award.

76. The Task Group favoured the idea proposed at their consultation event to raise the profile of disabled people, and agreed this idea should be further explored with CYC's Communities & Equalities Team, and agreed to pass on the information provided on the many issues affecting disabled people visiting West Offices.
77. In regard to their meeting with DisabledGo's Local Authorities Account Manager, the Task Group was impressed with the look and feel of the DisabledGo website recognising the quality of the information provided on venues. They agreed that the benefits of the site were the range of access and language options, enabling not only disabled visitors but foreign visitors to access the information, and the use of quick and easy symbols. Also, they recognised the benefit of using only one website to find access information as it provides the information in a standardised easy to follow format (rather than looking at each venue's website separately which brings with it the difficulties of locating the access information they provide, as highlighted elsewhere in this report).
78. The Task Group questioned how best to expand the reach of the access information held by DisabledGo, and learnt that it was possible for each venue to include on their own website a link to the relevant page on the DisabledGo website - this facility being provided as part of the Council contract. The Task Group agreed they would like to encourage all venues to take this approach, as it would better promote the accessibility of each venue, giving disabled people more confidence to visit the venue/site, and provide a recognisable standard of information across all York venues. They also recognised the benefits it could bring to the providers as it would negate the need for them to provide and maintain access information on their own website (thereby reducing their costs), and potentially help generate additional income, being in mind that disabled people have an annual spend of £80billion plus in the UK.
79. Noting the cost of providing the App and best practice guidance, the Task Group acknowledged the benefits that both would bring and queried whether the cost of commissioning the guidance per venue could be covered by re-charging each venue. Whilst the cost of the App was higher, the Task Group agreed that if York was serious about its reputation as a visitor friendly, top quality tourist venue, the cost was not excessive and it could help to encourage more of that £80billion plus to be spent in the city. They agreed that this is something that 'Make it York' could pursue as a way on generating additional income for the city as a whole.

80. Objective (iv) – Facilitating the sharing of good practice

The Task Group agreed that it may be possible to send a 'best practice' leaflet with business rates letters to encourage businesses to better promote their disabled access arrangements.

81. They also agreed the council could better promote its contract with DisabledGo by jointly writing to all venues to encourage them to include the DisabledGo link on their websites (see paragraph 77 above).

82. Having considered all the information on the way DisabledGo works, the Task Group agreed this could be the ideal way for Visit York to assist in the sharing good practice across York's network of providers, by:

a) Promoting the use of the link to the DisabledGo website to the heritage and cultural providers it works with, as a minimal standard of access information and;

b) Signposting the link on each venue's website in response to requests for access information from disabled visitors.

83. Finally the Task Group were pleased to note the Council were in talks with York Independent Living Network to introduce the 'Safe Places' scheme here in York. They agreed that both the Council and Visit York could help to promote the scheme to the city's heritage and cultural providers.

**Draft Review Recommendations**

84. In light of their work on this review, the Task Group identified the following draft recommendations for this Committee's consideration.

85. City of York Council to:

i) Continue to commission the services of an organisation (such as DisabledGo) that assesses the accessibility of heritage and cultural facilities in York, beyond the lifetime of the current DisabledGo contract (which ends in 2016)

ii) Communicate comprehensively through DisabledGo, with all York venues included on the DisabledGo website the benefits of including a DisabledGo link on their own website – highlighting the benefits it could bring to the venue and its visitors/customers (see paragraphs 77 & 80)

- iii) Introduce an annual event around York's disabled people past and present (see bullet point 7 in paragraph 55 and paragraph 75)
- iv) Improve inter-departmental working e.g. between Reinvigorate York, Planning and Transport staff to raise and make consistent our approach to access, reminding all of the impact on the cultural/heritage offer of the barriers created by poor access to public transport and moving around the city centre (see paragraphs 71)
- v) Liaise with bus providers on policy around access and remind them of the needs of York residents and visitors and the barriers poor access to public transport creates for disabled people trying to access York's heritage and cultural offer (see paragraphs 71)

86. Furthermore, the Task Group recommend that following the transfer of CYC's tourist activity to 'Make it York', that:

- vi) 'Full access for all to the city and its attractions should be one of Make it York's key aspirations'.

87. Finally, the Task Group recommend that 'Make it York':

- vii. Work with venues to assess their interest in accessing DisabledGo's best practice guides, with the intention of charging a fee covering the costs of those guides.
- viii. Promote and encourage York's live music venues to achieve the Live Music Industry's Charter of Best Practice (see paragraphs 44-45 & 70)
- ix. Promote and encourage York's heritage and cultural venues to sign up to Visit England's National Code of Visitor Attractions and seek accreditation to Visit England's Visitor Attraction Quality Assurance Scheme (see paragraphs 47-48 & 70)
- x. Assist in the sharing of good practice across York's network of heritage and cultural providers (see paragraphs 81-82), by:
  - Making accessibility a requirement of membership

- Promoting the use of the link to the DisabledGo website to the providers it works with, as a minimal standard of access information and;
  - Signposting the link on each venue's website in response to requests for access information from disabled visitors.
  - Promoting the 'Safe Places' Scheme
  - Including a link to 'yourlocalcinema' when displaying details of cinemas in York
- xi. Create a best practice accessibility-related award at the annual Visit York Tourism Awards (see paragraph 74).
- xii. Introduce a downloadable mobile application free to the public – the application to contain a comprehensive guide to accessible facilities in York. One example is the 'AccessAble' app provided by DisabledGo (see paragraph 78).
- xiii. If such an application is adopted, a marketing campaign should be run advising residents and visitors of the availability of the application and its benefits.
- xiv. Create and deliver training opportunities for public transport staff and staff at heritage and cultural venues, shops, cafes, restaurants etc to promote good practice (see paragraph 71).
- xv. Liaise with those organisations that participate, to improve disabled access to future 'Residents Festival' events (see paragraph 72).

## **Options**

87. Having considered the information provided in this report, the Committee may choose to:
- a) Revise this draft final report
  - b) Revise and/or identify alternative review recommendations
  - c) Endorse the draft review recommendations as listed above and sign off this report.

## Council Plan 2011-15

88. The work on this review supports the 'Protect Vulnerable People' priority within the Council Plan 2011-15.

## Implications & Risk Management

89. Information on the associated implications and risks is currently being identified and will be included in this report prior to its presentation to the Cabinet, once this Committee has confirmed the recommendations it wishes to make.

## Report Recommendations

90. The Learning & Culture Overview & Scrutiny Committee are recommended to:

- Note the review findings detailed in paragraphs 12 - 82 above.
- Endorse the Task Group draft recommendations as listed in paragraphs 84-86 above.

Reason: To conclude the work on this review in line with scrutiny procedures and protocols thereby enabling this draft final report to be presented at the next meeting of the full Learning & Culture Overview & Scrutiny Committee

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### Chief Officer Responsible for the report:

Andrew Docherty  
AD ITT & Governance

Report Approved  Date 4 February 2015

Wards Affected:

All



**Background Papers:** None

## Annexes:

**Annex A** – 2014 UK Customer Profile on Disability

**Annex B** – Equality Act 2013 Extract (online only)

**Annex C** – English Heritage Booklet

**Annex D** – English Heritage Access Strategy Information

**Annex E** – Access Information on York’s Heritage & Cultural Venues

**Annex F** – Visit England Code of Practice for Visitors

**Annex G**- List of York Venues Currently on DisabledGo’s Website

**Report Abbreviations:**

CEA – Cinema Exhibitors Association

CVS – Community Voluntary Sector

CYC – City of York Council

DDA – Disability Discrimination Act

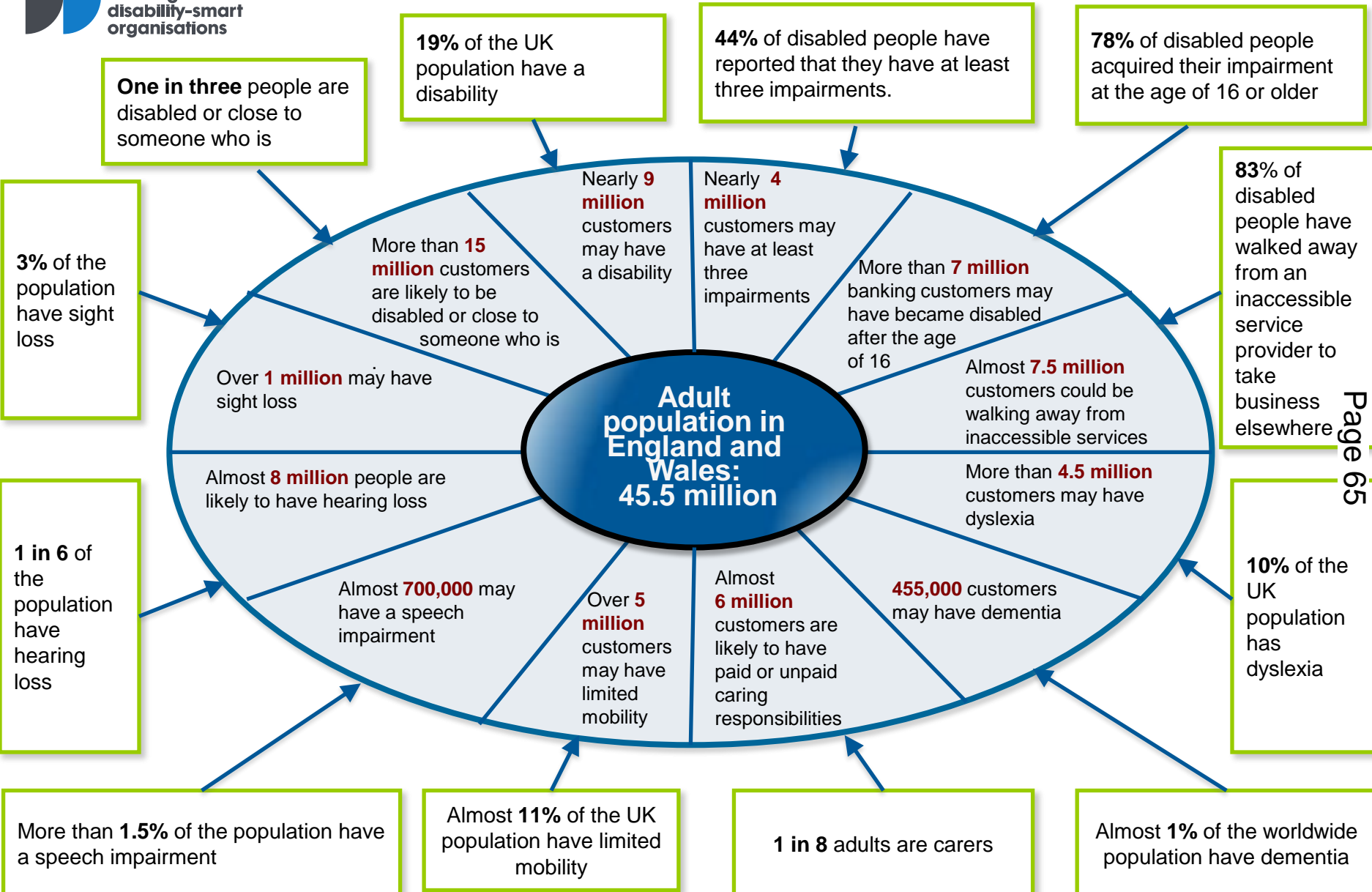
EAG – Equality Advisory Group

GP – General Practitioner

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# UK Customer Profile on Disability



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# Equality Act 2010

## CHAPTER 15

### CONTENTS

#### PART 1

##### SOCIO-ECONOMIC INEQUALITIES

- 1 Public sector duty regarding socio-economic inequalities
- 2 Power to amend section 1
- 3 Enforcement

#### PART 2

##### EQUALITY: KEY CONCEPTS

#### CHAPTER 1

##### PROTECTED CHARACTERISTICS

- 4 The protected characteristics
- 5 Age
- 6 Disability
- 7 Gender reassignment
- 8 Marriage and civil partnership
- 9 Race
- 10 Religion or belief
- 11 Sex
- 12 Sexual orientation

#### CHAPTER 2

##### PROHIBITED CONDUCT

##### *Discrimination*

- 13 Direct discrimination

- 14 Combined discrimination: dual characteristics
- 15 Discrimination arising from disability
- 16 Gender reassignment discrimination: cases of absence from work
- 17 Pregnancy and maternity discrimination: non-work cases
- 18 Pregnancy and maternity discrimination: work cases
- 19 Indirect discrimination

*Adjustments for disabled persons*

- 20 Duty to make adjustments
- 21 Failure to comply with duty
- 22 Regulations

*Discrimination: supplementary*

- 23 Comparison by reference to circumstances
- 24 Irrelevance of alleged discriminator's characteristics
- 25 References to particular strands of discrimination

*Other prohibited conduct*

- 26 Harassment
- 27 Victimisation

**PART 3**

SERVICES AND PUBLIC FUNCTIONS

*Preliminary*

- 28 Application of this Part

*Provision of services, etc.*

- 29 Provision of services, etc.

*Supplementary*

- 30 Ships and hovercraft
- 31 Interpretation and exceptions

**PART 4**

PREMISES

*Preliminary*

- 32 Application of this Part

*Disposal and management*

- 33 Disposals, etc.
- 34 Permission for disposal
- 35 Management

*Reasonable adjustments*

- 36 Leasehold and commonhold premises and common parts
- 37 Adjustments to common parts in Scotland

*Supplementary*

- 38 Interpretation and exceptions

**PART 5****WORK****CHAPTER 1****EMPLOYMENT, ETC.***Employees*

- 39 Employees and applicants
- 40 Employees and applicants: harassment
- 41 Contract workers

*Police officers*

- 42 Identity of employer
- 43 Interpretation

*Partners*

- 44 Partnerships
- 45 Limited liability partnerships
- 46 Interpretation

*The Bar*

- 47 Barristers
- 48 Advocates

*Office-holders*

- 49 Personal offices: appointments, etc.
- 50 Public offices: appointments, etc.
- 51 Public offices: recommendations for appointments, etc.
- 52 Interpretation and exceptions

*Qualifications*

- 53 Qualifications bodies
- 54 Interpretation

*Employment services*

- 55 Employment service-providers
- 56 Interpretation

*Trade organisations*

- 57 Trade organisations

*Local authority members*

- 58 Official business of members  
59 Interpretation

*Recruitment*

- 60 Enquiries about disability and health

**CHAPTER 2**

## OCCUPATIONAL PENSION SCHEMES

- 61 Non-discrimination rule  
62 Non-discrimination alterations  
63 Communications

**CHAPTER 3**

## EQUALITY OF TERMS

*Sex equality*

- 64 Relevant types of work  
65 Equal work  
66 Sex equality clause  
67 Sex equality rule  
68 Sex equality rule: consequential alteration of schemes  
69 Defence of material factor  
70 Exclusion of sex discrimination provisions  
71 Sex discrimination in relation to contractual pay

*Pregnancy and maternity equality*

- 72 Relevant types of work  
73 Maternity equality clause  
74 Maternity equality clause: pay  
75 Maternity equality rule  
76 Exclusion of pregnancy and maternity discrimination provisions

*Disclosure of information*

- 77 Discussions about pay  
78 Gender pay gap information

*Supplementary*

- 79 Comparators  
80 Interpretation and exceptions

**CHAPTER 4**

SUPPLEMENTARY

- 81 Ships and hovercraft
- 82 Offshore work
- 83 Interpretation and exceptions

**PART 6**

EDUCATION

**CHAPTER 1**

SCHOOLS

- 84 Application of this Chapter
- 85 Pupils: admission and treatment, etc.
- 86 Victimisation of pupils, etc. for conduct of parents, etc.
- 87 Application of certain powers under Education Act 1996
- 88 Disabled pupils: accessibility
- 89 Interpretation and exceptions

**CHAPTER 2**

FURTHER AND HIGHER EDUCATION

- 90 Application of this Chapter
- 91 Students: admission and treatment, etc.
- 92 Further and higher education courses
- 93 Recreational or training facilities
- 94 Interpretation and exceptions

**CHAPTER 3**

GENERAL QUALIFICATIONS BODIES

- 95 Application of this Chapter
- 96 Qualifications bodies
- 97 Interpretation

**CHAPTER 4**

MISCELLANEOUS

- 98 Reasonable adjustments
- 99 Educational charities and endowments

**PART 7**

## ASSOCIATIONS

*Preliminary*

100 Application of this Part

*Membership, etc.*

101 Members and associates

102 Guests

103 Sections 101 and 102: further provision

*Special provision for political parties*

104 Selection of candidates

105 Time-limited provision

106 Information about diversity in range of candidates, etc.

*Supplementary*

107 Interpretation and exceptions

**PART 8**

## PROHIBITED CONDUCT: ANCILLARY

108 Relationships that have ended

109 Liability of employers and principals

110 Liability of employees and agents

111 Instructing, causing or inducing contraventions

112 Aiding contraventions

**PART 9**

## ENFORCEMENT

**CHAPTER 1**

## INTRODUCTORY

113 Proceedings

**CHAPTER 2**

## CIVIL COURTS

114 Jurisdiction

115 Immigration cases

116 Education cases

117 National security

118 Time limits

119 Remedies



**CHAPTER 3**

## EMPLOYMENT TRIBUNALS

- 120 Jurisdiction
- 121 Armed forces cases
- 122 References by court to tribunal, etc.
- 123 Time limits
- 124 Remedies: general
- 125 Remedies: national security
- 126 Remedies: occupational pension schemes

**CHAPTER 4**

## EQUALITY OF TERMS

- 127 Jurisdiction
- 128 References by court to tribunal, etc.
- 129 Time limits
- 130 Section 129: supplementary
- 131 Assessment of whether work is of equal value
- 132 Remedies in non-pensions cases
- 133 Remedies in pensions cases
- 134 Remedies in claims for arrears brought by pensioner members
- 135 Supplementary

**CHAPTER 5**

## MISCELLANEOUS

- 136 Burden of proof
- 137 Previous findings
- 138 Obtaining information, etc.
- 139 Interest
- 140 Conduct giving rise to separate proceedings
- 141 Interpretation, etc.

**PART 10**

## CONTRACTS, ETC.

*Contracts and other agreements*

- 142 Unenforceable terms
- 143 Removal or modification of unenforceable terms
- 144 Contracting out

*Collective agreements and rules of undertakings*

- 145 Void and unenforceable terms
- 146 Declaration in respect of void term, etc.

*Supplementary*

- 147 Meaning of “qualifying compromise contract”
- 148 Interpretation

**PART 11**

## ADVANCEMENT OF EQUALITY

**CHAPTER 1**

## PUBLIC SECTOR EQUALITY DUTY

- 149 Public sector equality duty
- 150 Public authorities and public functions
- 151 Power to specify public authorities
- 152 Power to specify public authorities: consultation and consent
- 153 Power to impose specific duties
- 154 Power to impose specific duties: cross-border authorities
- 155 Power to impose specific duties: supplementary
- 156 Enforcement
- 157 Interpretation

**CHAPTER 2**

## POSITIVE ACTION

- 158 Positive action: general
- 159 Positive action: recruitment and promotion

**PART 12**

## DISABLED PERSONS: TRANSPORT

**CHAPTER 1**

## TAXIS, ETC.

- 160 Taxi accessibility regulations
- 161 Control of numbers of licensed taxis: exception
- 162 Designated transport facilities
- 163 Taxi licence conditional on compliance with taxi accessibility regulations
- 164 Exemption from taxi accessibility regulations
- 165 Passengers in wheelchairs
- 166 Passengers in wheelchairs: exemption certificates
- 167 Lists of wheelchair-accessible vehicles
- 168 Assistance dogs in taxis
- 169 Assistance dogs in taxis: exemption certificates
- 170 Assistance dogs in private hire vehicles
- 171 Assistance dogs in private hire vehicles: exemption certificates
- 172 Appeals
- 173 Interpretation

**CHAPTER 2**

## PUBLIC SERVICE VEHICLES

- 174 PSV accessibility regulations
- 175 Offence of contravening PSV accessibility regulations
- 176 Accessibility certificates
- 177 Approval certificates
- 178 Special authorisations
- 179 Reviews and appeals
- 180 Fees
- 181 Interpretation

**CHAPTER 3**

## RAIL VEHICLES

- 182 Rail vehicle accessibility regulations
- 183 Exemptions from rail vehicle accessibility regulations
- 184 Procedure for making exemption orders
- 185 Annual report on exemption orders
- 186 Rail vehicle accessibility: compliance
- 187 Interpretation

**CHAPTER 4**

## SUPPLEMENTARY

- 188 Forgery, etc.

**PART 13**

## DISABILITY: MISCELLANEOUS

- 189 Reasonable adjustments
- 190 Improvements to let dwelling houses

**PART 14**

## GENERAL EXCEPTIONS

- 191 Statutory provisions
- 192 National security
- 193 Charities
- 194 Charities: supplementary
- 195 Sport
- 196 General
- 197 Age

**PART 15**

## FAMILY PROPERTY

- 198 Abolition of husband's duty to maintain wife

- 199 Abolition of presumption of advancement  
 200 Amendment of Married Women's Property Act 1964  
 201 Civil partners: housekeeping allowance

## PART 16

### GENERAL AND MISCELLANEOUS

#### *Civil partnerships*

- 202 Civil partnerships on religious premises

#### *EU obligations*

- 203 Harmonisation  
 204 Harmonisation: procedure

#### *Application*

- 205 Crown application  
 206 Information society services

#### *Subordinate legislation*

- 207 Exercise of power  
 208 Ministers of the Crown, etc.  
 209 The Welsh Ministers  
 210 The Scottish Ministers

#### *Amendments, etc.*

- 211 Amendments, repeals and revocations

#### *Interpretation*

- 212 General interpretation  
 213 References to maternity leave, etc.  
 214 Index of defined expressions

#### *Final provisions*

- 215 Money  
 216 Commencement  
 217 Extent  
 218 Short title

- 
- Schedule 1 – Disability: supplementary provision  
     Part 1 – Determination of disability  
     Part 2 – Guidance  
 Schedule 2 – Services and public functions: reasonable adjustments  
 Schedule 3 – Services and public functions: exceptions

- Part 1 – Constitutional matters
- Part 2 – Education
- Part 3 – Health and care
- Part 4 – Immigration
- Part 5 – Insurance, etc.
- Part 6 – Marriage
- Part 7 – Separate and single services
- Part 8 – Television, radio and on-line broadcasting and distribution
- Part 9 – Transport
- Part 10 – Supplementary
- Schedule 4 – Premises: reasonable adjustments
- Schedule 5 – Premises: exceptions
- Schedule 6 – Office-holders: excluded offices
- Schedule 7 – Equality of terms: exceptions
  - Part 1 – Terms of work
  - Part 2 – Occupational pension schemes
- Schedule 8 – Work: reasonable adjustments
  - Part 1 – Introductory
  - Part 2 – Interested disabled person
  - Part 3 – Limitations on the duty
- Schedule 9 – Work: exceptions
  - Part 1 – Occupational requirements
  - Part 2 – Exceptions relating to age
  - Part 3 – Other exceptions
- Schedule 10 – Accessibility for disabled pupils
- Schedule 11 – Schools: exceptions
  - Part 1 – Sex discrimination
  - Part 2 – Religious or belief-related discrimination
  - Part 3 – Disability discrimination
- Schedule 12 – Further and higher education exceptions
  - Part 1 – Single-sex institutions, etc.
  - Part 2 – Other exceptions
- Schedule 13 – Education: reasonable adjustments
- Schedule 14 – Educational charities and endowments
- Schedule 15 – Associations: reasonable adjustments
- Schedule 16 – Associations: exceptions
- Schedule 17 – Disabled pupils: enforcement
  - Part 1 – Introductory
  - Part 2 – Tribunals in England and Wales
  - Part 3 – Tribunals in Scotland
  - Part 4 – Admissions and exclusions
- Schedule 18 – Public sector equality duty: exceptions
- Schedule 19 – Public authorities
  - Part 1 – Public authorities: general
  - Part 2 – Public authorities: relevant Welsh authorities
  - Part 3 – Public authorities: relevant Scottish authorities
- Schedule 20 – Rail vehicle accessibility: compliance
- Schedule 21 – Reasonable adjustments: supplementary
- Schedule 22 – Statutory provisions
- Schedule 23 – General exceptions
- Schedule 24 – Harmonisation: exceptions
- Schedule 25 – Information society services
- Schedule 26 – Amendments
- Schedule 27 – Repeals and revocations

- Part 1 – Repeals
- Part 2 – Revocations
- Schedule 28 – Index of defined expressions



# Equality Act 2010

## 2010 CHAPTER 15

An Act to make provision to require Ministers of the Crown and others when making strategic decisions about the exercise of their functions to have regard to the desirability of reducing socio-economic inequalities; to reform and harmonise equality law and restate the greater part of the enactments relating to discrimination and harassment related to certain personal characteristics; to enable certain employers to be required to publish information about the differences in pay between male and female employees; to prohibit victimisation in certain circumstances; to require the exercise of certain functions to be with regard to the need to eliminate discrimination and other prohibited conduct; to enable duties to be imposed in relation to the exercise of public procurement functions; to increase equality of opportunity; to amend the law relating to rights and responsibilities in family relationships; and for connected purposes. [8th April 2010]

**B**E IT ENACTED by the Queen's most Excellent Majesty, by and with the advice and consent of the Lords Spiritual and Temporal, and Commons, in this present Parliament assembled, and by the authority of the same, as follows:—

### PART 1

#### SOCIO-ECONOMIC INEQUALITIES

##### **1 Public sector duty regarding socio-economic inequalities**

- (1) An authority to which this section applies must, when making decisions of a strategic nature about how to exercise its functions, have due regard to the desirability of exercising them in a way that is designed to reduce the inequalities of outcome which result from socio-economic disadvantage.
- (2) In deciding how to fulfil a duty to which it is subject under subsection (1), an authority must take into account any guidance issued by a Minister of the Crown.

- (3) The authorities to which this section applies are –
- (a) a Minister of the Crown;
  - (b) a government department other than the Security Service, the Secret Intelligence Service or the Government Communications Headquarters;
  - (c) a county council or district council in England;
  - (d) the Greater London Authority;
  - (e) a London borough council;
  - (f) the Common Council of the City of London in its capacity as a local authority;
  - (g) the Council of the Isles of Scilly;
  - (h) a Strategic Health Authority established under section 13 of the National Health Service Act 2006, or continued in existence by virtue of that section;
  - (i) a Primary Care Trust established under section 18 of that Act, or continued in existence by virtue of that section;
  - (j) a regional development agency established by the Regional Development Agencies Act 1998;
  - (k) a police authority established for an area in England.
- (4) This section also applies to an authority that –
- (a) is a partner authority in relation to a responsible local authority, and
  - (b) does not fall within subsection (3),
- but only in relation to its participation in the preparation or modification of a sustainable community strategy.
- (5) In subsection (4) –
- “partner authority” has the meaning given by section 104 of the Local Government and Public Involvement in Health Act 2007;
- “responsible local authority” has the meaning given by section 103 of that Act;
- “sustainable community strategy” means a strategy prepared under section 4 of the Local Government Act 2000.
- (6) The reference to inequalities in subsection (1) does not include any inequalities experienced by a person as a result of being a person subject to immigration control within the meaning given by section 115(9) of the Immigration and Asylum Act 1999.

## 2 Power to amend section 1

- (1) A Minister of the Crown may by regulations amend section 1 so as to –
- (a) add a public authority to the authorities that are subject to the duty under subsection (1) of that section;
  - (b) remove an authority from those that are subject to the duty;
  - (c) make the duty apply, in the case of a particular authority, only in relation to certain functions that it has;
  - (d) in the case of an authority to which the application of the duty is already restricted to certain functions, remove or alter the restriction.
- (2) In subsection (1) “public authority” means an authority that has functions of a public nature.



- (3) Provision made under subsection (1) may not impose a duty on an authority in relation to any devolved Scottish functions or devolved Welsh functions.
- (4) The Scottish Ministers or the Welsh Ministers may by regulations amend section 1 so as to –
  - (a) add a relevant authority to the authorities that are subject to the duty under subsection (1) of that section;
  - (b) remove a relevant authority from those that are subject to the duty;
  - (c) make the duty apply, in the case of a particular relevant authority, only in relation to certain functions that it has;
  - (d) in the case of a relevant authority to which the application of the duty is already restricted to certain functions, remove or alter the restriction.
- (5) For the purposes of the power conferred by subsection (4) on the Scottish Ministers, “relevant authority” means an authority whose functions –
  - (a) are exercisable only in or as regards Scotland,
  - (b) are wholly or mainly devolved Scottish functions, and
  - (c) correspond or are similar to those of an authority for the time being specified in section 1(3).
- (6) For the purposes of the power conferred by subsection (4) on the Welsh Ministers, “relevant authority” means an authority whose functions –
  - (a) are exercisable only in or as regards Wales,
  - (b) are wholly or mainly devolved Welsh functions, and
  - (c) correspond or are similar to those of an authority for the time being specified in subsection (3) of section 1 or referred to in subsection (4) of that section.
- (7) Before making regulations under this section, the Scottish Ministers or the Welsh Ministers must consult a Minister of the Crown.
- (8) Regulations under this section may make any amendments of section 1 that appear to the Minister or Ministers to be necessary or expedient in consequence of provision made under subsection (1) or (as the case may be) subsection (4).
- (9) Provision made by the Scottish Ministers or the Welsh Ministers in reliance on subsection (8) may, in particular, amend section 1 so as to –
  - (a) confer on the Ministers a power to issue guidance;
  - (b) require a relevant authority to take into account any guidance issued under a power conferred by virtue of paragraph (a);
  - (c) disapply section 1(2) in consequence of the imposition of a requirement by virtue of paragraph (b).
- (10) Before issuing guidance under a power conferred by virtue of subsection (9)(a), the Ministers must –
  - (a) take into account any guidance issued by a Minister of the Crown under section 1;
  - (b) consult a Minister of the Crown.
- (11) For the purposes of this section –
  - (a) a function is a devolved Scottish function if it is exercisable in or as regards Scotland and it does not relate to reserved matters (within the meaning of the Scotland Act 1998);
  - (b) a function is a devolved Welsh function if it relates to a matter in respect of which functions are exercisable by the Welsh Ministers, the First

Minister for Wales or the Counsel General to the Welsh Assembly Government, or to a matter within the legislative competence of the National Assembly for Wales.

### 3 Enforcement

A failure in respect of a performance of a duty under section 1 does not confer a cause of action at private law.

## PART 2

### EQUALITY: KEY CONCEPTS

#### CHAPTER 1

##### PROTECTED CHARACTERISTICS

### 4 The protected characteristics

The following characteristics are protected characteristics –

age;  
 disability;  
 gender reassignment;  
 marriage and civil partnership;  
 pregnancy and maternity;  
 race;  
 religion or belief;  
 sex;  
 sexual orientation.

### 5 Age

- (1) In relation to the protected characteristic of age –
  - (a) a reference to a person who has a particular protected characteristic is a reference to a person of a particular age group;
  - (b) a reference to persons who share a protected characteristic is a reference to persons of the same age group.
- (2) A reference to an age group is a reference to a group of persons defined by reference to age, whether by reference to a particular age or to a range of ages.

### 6 Disability

- (1) A person (P) has a disability if –
  - (a) P has a physical or mental impairment, and
  - (b) the impairment has a substantial and long-term adverse effect on P's ability to carry out normal day-to-day activities.
- (2) A reference to a disabled person is a reference to a person who has a disability.
- (3) In relation to the protected characteristic of disability –
  - (a) a reference to a person who has a particular protected characteristic is a reference to a person who has a particular disability;

- (b) a reference to persons who share a protected characteristic is a reference to persons who have the same disability.
- (4) This Act (except Part 12 and section 190) applies in relation to a person who has had a disability as it applies in relation to a person who has the disability; accordingly (except in that Part and that section) –
  - (a) a reference (however expressed) to a person who has a disability includes a reference to a person who has had the disability, and
  - (b) a reference (however expressed) to a person who does not have a disability includes a reference to a person who has not had the disability.
- (5) A Minister of the Crown may issue guidance about matters to be taken into account in deciding any question for the purposes of subsection (1).
- (6) Schedule 1 (disability: supplementary provision) has effect.

## **7 Gender reassignment**

- (1) A person has the protected characteristic of gender reassignment if the person is proposing to undergo, is undergoing or has undergone a process (or part of a process) for the purpose of reassigning the person's sex by changing physiological or other attributes of sex.
- (2) A reference to a transsexual person is a reference to a person who has the protected characteristic of gender reassignment.
- (3) In relation to the protected characteristic of gender reassignment –
  - (a) a reference to a person who has a particular protected characteristic is a reference to a transsexual person;
  - (b) a reference to persons who share a protected characteristic is a reference to transsexual persons.

## **8 Marriage and civil partnership**

- (1) A person has the protected characteristic of marriage and civil partnership if the person is married or is a civil partner.
- (2) In relation to the protected characteristic of marriage and civil partnership –
  - (a) a reference to a person who has a particular protected characteristic is a reference to a person who is married or is a civil partner;
  - (b) a reference to persons who share a protected characteristic is a reference to persons who are married or are civil partners.

## **9 Race**

- (1) Race includes –
  - (a) colour;
  - (b) nationality;
  - (c) ethnic or national origins.
- (2) In relation to the protected characteristic of race –
  - (a) a reference to a person who has a particular protected characteristic is a reference to a person of a particular racial group;

- (b) a reference to persons who share a protected characteristic is a reference to persons of the same racial group.
- (3) A racial group is a group of persons defined by reference to race; and a reference to a person's racial group is a reference to a racial group into which the person falls.
- (4) The fact that a racial group comprises two or more distinct racial groups does not prevent it from constituting a particular racial group.
- (5) A Minister of the Crown may by order –
  - (a) amend this section so as to provide for caste to be an aspect of race;
  - (b) amend this Act so as to provide for an exception to a provision of this Act to apply, or not to apply, to caste or to apply, or not to apply, to caste in specified circumstances.
- (6) The power under section 207(4)(b), in its application to subsection (5), includes power to amend this Act.

## **10 Religion or belief**

- (1) Religion means any religion and a reference to religion includes a reference to a lack of religion.
- (2) Belief means any religious or philosophical belief and a reference to belief includes a reference to a lack of belief.
- (3) In relation to the protected characteristic of religion or belief –
  - (a) a reference to a person who has a particular protected characteristic is a reference to a person of a particular religion or belief;
  - (b) a reference to persons who share a protected characteristic is a reference to persons who are of the same religion or belief.

## **11 Sex**

In relation to the protected characteristic of sex –

- (a) a reference to a person who has a particular protected characteristic is a reference to a man or to a woman;
- (b) a reference to persons who share a protected characteristic is a reference to persons of the same sex.

## **12 Sexual orientation**

- (1) Sexual orientation means a person's sexual orientation towards –
  - (a) persons of the same sex,
  - (b) persons of the opposite sex, or
  - (c) persons of either sex.
- (2) In relation to the protected characteristic of sexual orientation –
  - (a) a reference to a person who has a particular protected characteristic is a reference to a person who is of a particular sexual orientation;
  - (b) a reference to persons who share a protected characteristic is a reference to persons who are of the same sexual orientation.

## CHAPTER 2

### PROHIBITED CONDUCT

#### *Discrimination*

#### **13 Direct discrimination**

- (1) A person (A) discriminates against another (B) if, because of a protected characteristic, A treats B less favourably than A treats or would treat others.
- (2) If the protected characteristic is age, A does not discriminate against B if A can show A's treatment of B to be a proportionate means of achieving a legitimate aim.
- (3) If the protected characteristic is disability, and B is not a disabled person, A does not discriminate against B only because A treats or would treat disabled persons more favourably than A treats B.
- (4) If the protected characteristic is marriage and civil partnership, this section applies to a contravention of Part 5 (work) only if the treatment is because it is B who is married or a civil partner.
- (5) If the protected characteristic is race, less favourable treatment includes segregating B from others.
- (6) If the protected characteristic is sex –
  - (a) less favourable treatment of a woman includes less favourable treatment of her because she is breast-feeding;
  - (b) in a case where B is a man, no account is to be taken of special treatment afforded to a woman in connection with pregnancy or childbirth.
- (7) Subsection (6)(a) does not apply for the purposes of Part 5 (work).
- (8) This section is subject to sections 17(6) and 18(7).

#### **14 Combined discrimination: dual characteristics**

- (1) A person (A) discriminates against another (B) if, because of a combination of two relevant protected characteristics, A treats B less favourably than A treats or would treat a person who does not share either of those characteristics.
- (2) The relevant protected characteristics are –
  - (a) age;
  - (b) disability;
  - (c) gender reassignment;
  - (d) race
  - (e) religion or belief;
  - (f) sex;
  - (g) sexual orientation.
- (3) For the purposes of establishing a contravention of this Act by virtue of subsection (1), B need not show that A's treatment of B is direct discrimination because of each of the characteristics in the combination (taken separately).

- (4) But B cannot establish a contravention of this Act by virtue of subsection (1) if, in reliance on another provision of this Act or any other enactment, A shows that A's treatment of B is not direct discrimination because of either or both of the characteristics in the combination.
- (5) Subsection (1) does not apply to a combination of characteristics that includes disability in circumstances where, if a claim of direct discrimination because of disability were to be brought, it would come within section 116 (special educational needs).
- (6) A Minister of the Crown may by order amend this section so as to—
  - (a) make further provision about circumstances in which B can, or in which B cannot, establish a contravention of this Act by virtue of subsection (1);
  - (b) specify other circumstances in which subsection (1) does not apply.
- (7) The references to direct discrimination are to a contravention of this Act by virtue of section 13.

## **15 Discrimination arising from disability**

- (1) A person (A) discriminates against a disabled person (B) if—
  - (a) A treats B unfavourably because of something arising in consequence of B's disability, and
  - (b) A cannot show that the treatment is a proportionate means of achieving a legitimate aim.
- (2) Subsection (1) does not apply if A shows that A did not know, and could not reasonably have been expected to know, that B had the disability.

## **16 Gender reassignment discrimination: cases of absence from work**

- (1) This section has effect for the purposes of the application of Part 5 (work) to the protected characteristic of gender reassignment.
- (2) A person (A) discriminates against a transsexual person (B) if, in relation to an absence of B's that is because of gender reassignment, A treats B less favourably than A would treat B if—
  - (a) B's absence was because of sickness or injury, or
  - (b) B's absence was for some other reason and it is not reasonable for B to be treated less favourably.
- (3) A person's absence is because of gender reassignment if it is because the person is proposing to undergo, is undergoing or has undergone the process (or part of the process) mentioned in section 7(1).

## **17 Pregnancy and maternity discrimination: non-work cases**

- (1) This section has effect for the purposes of the application to the protected characteristic of pregnancy and maternity of—
  - (a) Part 3 (services and public functions);
  - (b) Part 4 (premises);
  - (c) Part 6 (education);
  - (d) Part 7 (associations).



- (2) A person (A) discriminates against a woman if A treats her unfavourably because of a pregnancy of hers.
- (3) A person (A) discriminates against a woman if, in the period of 26 weeks beginning with the day on which she gives birth, A treats her unfavourably because she has given birth.
- (4) The reference in subsection (3) to treating a woman unfavourably because she has given birth includes, in particular, a reference to treating her unfavourably because she is breast-feeding.
- (5) For the purposes of this section, the day on which a woman gives birth is the day on which—
  - (a) she gives birth to a living child, or
  - (b) she gives birth to a dead child (more than 24 weeks of the pregnancy having passed).
- (6) Section 13, so far as relating to sex discrimination, does not apply to anything done in relation to a woman in so far as—
  - (a) it is for the reason mentioned in subsection (2), or
  - (b) it is in the period, and for the reason, mentioned in subsection (3).

## 18 Pregnancy and maternity discrimination: work cases

- (1) This section has effect for the purposes of the application of Part 5 (work) to the protected characteristic of pregnancy and maternity.
- (2) A person (A) discriminates against a woman if, in the protected period in relation to a pregnancy of hers, A treats her unfavourably—
  - (a) because of the pregnancy, or
  - (b) because of illness suffered by her as a result of it.
- (3) A person (A) discriminates against a woman if A treats her unfavourably because she is on compulsory maternity leave.
- (4) A person (A) discriminates against a woman if A treats her unfavourably because she is exercising or seeking to exercise, or has exercised or sought to exercise, the right to ordinary or additional maternity leave.
- (5) For the purposes of subsection (2), if the treatment of a woman is in implementation of a decision taken in the protected period, the treatment is to be regarded as occurring in that period (even if the implementation is not until after the end of that period).
- (6) The protected period, in relation to a woman's pregnancy, begins when the pregnancy begins, and ends—
  - (a) if she has the right to ordinary and additional maternity leave, at the end of the additional maternity leave period or (if earlier) when she returns to work after the pregnancy;
  - (b) if she does not have that right, at the end of the period of 2 weeks beginning with the end of the pregnancy.
- (7) Section 13, so far as relating to sex discrimination, does not apply to treatment of a woman in so far as—
  - (a) it is in the protected period in relation to her and is for a reason mentioned in paragraph (a) or (b) of subsection (2), or
  - (b) it is for a reason mentioned in subsection (3) or (4).

**19 Indirect discrimination**

- (1) A person (A) discriminates against another (B) if A applies to B a provision, criterion or practice which is discriminatory in relation to a relevant protected characteristic of B's.
- (2) For the purposes of subsection (1), a provision, criterion or practice is discriminatory in relation to a relevant protected characteristic of B's if—
  - (a) A applies, or would apply, it to persons with whom B does not share the characteristic,
  - (b) it puts, or would put, persons with whom B shares the characteristic at a particular disadvantage when compared with persons with whom B does not share it,
  - (c) it puts, or would put, B at that disadvantage, and
  - (d) A cannot show it to be a proportionate means of achieving a legitimate aim.
- (3) The relevant protected characteristics are—
  - age;
  - disability;
  - gender reassignment;
  - marriage and civil partnership;
  - race;
  - religion or belief;
  - sex;
  - sexual orientation.

*Adjustments for disabled persons***20 Duty to make adjustments**

- (1) Where this Act imposes a duty to make reasonable adjustments on a person, this section, sections 21 and 22 and the applicable Schedule apply; and for those purposes, a person on whom the duty is imposed is referred to as A.
- (2) The duty comprises the following three requirements.
- (3) The first requirement is a requirement, where a provision, criterion or practice of A's puts a disabled person at a substantial disadvantage in relation to a relevant matter in comparison with persons who are not disabled, to take such steps as it is reasonable to have to take to avoid the disadvantage.
- (4) The second requirement is a requirement, where a physical feature puts a disabled person at a substantial disadvantage in relation to a relevant matter in comparison with persons who are not disabled, to take such steps as it is reasonable to have to take to avoid the disadvantage.
- (5) The third requirement is a requirement, where a disabled person would, but for the provision of an auxiliary aid, be put at a substantial disadvantage in relation to a relevant matter in comparison with persons who are not disabled, to take such steps as it is reasonable to have to take to provide the auxiliary aid.
- (6) Where the first or third requirement relates to the provision of information, the steps which it is reasonable for A to have to take include steps for ensuring that



in the circumstances concerned the information is provided in an accessible format.

- (7) A person (A) who is subject to a duty to make reasonable adjustments is not (subject to express provision to the contrary) entitled to require a disabled person, in relation to whom A is required to comply with the duty, to pay to any extent A's costs of complying with the duty.
- (8) A reference in section 21 or 22 or an applicable Schedule to the first, second or third requirement is to be construed in accordance with this section.
- (9) In relation to the second requirement, a reference in this section or an applicable Schedule to avoiding a substantial disadvantage includes a reference to –
  - (a) removing the physical feature in question,
  - (b) altering it, or
  - (c) providing a reasonable means of avoiding it.
- (10) A reference in this section, section 21 or 22 or an applicable Schedule (apart from paragraphs 2 to 4 of Schedule 4) to a physical feature is a reference to –
  - (a) a feature arising from the design or construction of a building,
  - (b) a feature of an approach to, exit from or access to a building,
  - (c) a fixture or fitting, or furniture, furnishings, materials, equipment or other chattels, in or on premises, or
  - (d) any other physical element or quality.
- (11) A reference in this section, section 21 or 22 or an applicable Schedule to an auxiliary aid includes a reference to an auxiliary service.
- (12) A reference in this section or an applicable Schedule to chattels is to be read, in relation to Scotland, as a reference to moveable property.
- (13) The applicable Schedule is, in relation to the Part of this Act specified in the first column of the Table, the Schedule specified in the second column.

<i>Part of this Act</i>	<i>Applicable Schedule</i>
Part 3 (services and public functions)	Schedule 2
Part 4 (premises)	Schedule 4
Part 5 (work)	Schedule 8
Part 6 (education)	Schedule 13
Part 7 (associations)	Schedule 15
Each of the Parts mentioned above	Schedule 21

## **21 Failure to comply with duty**

- (1) A failure to comply with the first, second or third requirement is a failure to comply with a duty to make reasonable adjustments.
- (2) A discriminates against a disabled person if A fails to comply with that duty in relation to that person.

- (3) A provision of an applicable Schedule which imposes a duty to comply with the first, second or third requirement applies only for the purpose of establishing whether A has contravened this Act by virtue of subsection (2); a failure to comply is, accordingly, not actionable by virtue of another provision of this Act or otherwise.

## 22 Regulations

- (1) Regulations may prescribe –
- (a) matters to be taken into account in deciding whether it is reasonable for A to take a step for the purposes of a prescribed provision of an applicable Schedule;
  - (b) descriptions of persons to whom the first, second or third requirement does not apply.
- (2) Regulations may make provision as to –
- (a) circumstances in which it is, or in which it is not, reasonable for a person of a prescribed description to have to take steps of a prescribed description;
  - (b) what is, or what is not, a provision, criterion or practice;
  - (c) things which are, or which are not, to be treated as physical features;
  - (d) things which are, or which are not, to be treated as alterations of physical features;
  - (e) things which are, or which are not, to be treated as auxiliary aids.
- (3) Provision made by virtue of this section may amend an applicable Schedule.

*Discrimination: supplementary*

## 23 Comparison by reference to circumstances

- (1) On a comparison of cases for the purposes of section 13, 14, or 19 there must be no material difference between the circumstances relating to each case.
- (2) The circumstances relating to a case include a person's abilities if –
- (a) on a comparison for the purposes of section 13, the protected characteristic is disability;
  - (b) on a comparison for the purposes of section 14, one of the protected characteristics in the combination is disability.
- (3) If the protected characteristic is sexual orientation, the fact that one person (whether or not the person referred to as B) is a civil partner while another is married is not a material difference between the circumstances relating to each case.

## 24 Irrelevance of alleged discriminator's characteristics

- (1) For the purpose of establishing a contravention of this Act by virtue of section 13(1), it does not matter whether A has the protected characteristic.
- (2) For the purpose of establishing a contravention of this Act by virtue of section 14(1), it does not matter –
- (a) whether A has one of the protected characteristics in the combination;
  - (b) whether A has both.

## 25 References to particular strands of discrimination

- (1) Age discrimination is –
  - (a) discrimination within section 13 because of age;
  - (b) discrimination within section 19 where the relevant protected characteristic is age.
- (2) Disability discrimination is –
  - (a) discrimination within section 13 because of disability;
  - (b) discrimination within section 15;
  - (c) discrimination within section 19 where the relevant protected characteristic is disability;
  - (d) discrimination within section 21.
- (3) Gender reassignment discrimination is –
  - (a) discrimination within section 13 because of gender reassignment;
  - (b) discrimination within section 16;
  - (c) discrimination within section 19 where the relevant protected characteristic is gender reassignment.
- (4) Marriage and civil partnership discrimination is –
  - (a) discrimination within section 13 because of marriage and civil partnership;
  - (b) discrimination within section 19 where the relevant protected characteristic is marriage and civil partnership.
- (5) Pregnancy and maternity discrimination is discrimination within section 17 or 18.
- (6) Race discrimination is –
  - (a) discrimination within section 13 because of race;
  - (b) discrimination within section 19 where the relevant protected characteristic is race.
- (7) Religious or belief-related discrimination is –
  - (a) discrimination within section 13 because of religion or belief;
  - (b) discrimination within section 19 where the relevant protected characteristic is religion or belief.
- (8) Sex discrimination is –
  - (a) discrimination within section 13 because of sex;
  - (b) discrimination within section 19 where the relevant protected characteristic is sex.
- (9) Sexual orientation discrimination is –
  - (a) discrimination within section 13 because of sexual orientation;
  - (b) discrimination within section 19 where the relevant protected characteristic is sexual orientation.

### *Other prohibited conduct*

## 26 Harassment

- (1) A person (A) harasses another (B) if –

- (a) A engages in unwanted conduct related to a relevant protected characteristic, and
- (b) the conduct has the purpose or effect of –
  - (i) violating B’s dignity, or
  - (ii) creating an intimidating, hostile, degrading, humiliating or offensive environment for B.
- (2) A also harasses B if –
  - (a) A engages in unwanted conduct of a sexual nature, and
  - (b) the conduct has the purpose or effect referred to in subsection (1)(b).
- (3) A also harasses B if –
  - (a) A or another person engages in unwanted conduct of a sexual nature or that is related to gender reassignment or sex,
  - (b) the conduct has the purpose or effect referred to in subsection (1)(b), and
  - (c) because of B’s rejection of or submission to the conduct, A treats B less favourably than A would treat B if B had not rejected or submitted to the conduct.
- (4) In deciding whether conduct has the effect referred to in subsection (1)(b), each of the following must be taken into account –
  - (a) the perception of B;
  - (b) the other circumstances of the case;
  - (c) whether it is reasonable for the conduct to have that effect.
- (5) The relevant protected characteristics are –
  - age;
  - disability;
  - gender reassignment;
  - race;
  - religion or belief;
  - sex;
  - sexual orientation.

## **27 Victimization**

- (1) A person (A) victimises another person (B) if A subjects B to a detriment because –
  - (a) B does a protected act, or
  - (b) A believes that B has done, or may do, a protected act.
- (2) Each of the following is a protected act –
  - (a) bringing proceedings under this Act;
  - (b) giving evidence or information in connection with proceedings under this Act;
  - (c) doing any other thing for the purposes of or in connection with this Act;
  - (d) making an allegation (whether or not express) that A or another person has contravened this Act.
- (3) Giving false evidence or information, or making a false allegation, is not a protected act if the evidence or information is given, or the allegation is made, in bad faith.

- (4) This section applies only where the person subjected to a detriment is an individual.
- (5) The reference to contravening this Act includes a reference to committing a breach of an equality clause or rule.

### PART 3

#### SERVICES AND PUBLIC FUNCTIONS

##### *Preliminary*

#### **28 Application of this Part**

- (1) This Part does not apply to the protected characteristic of—
  - (a) age, so far as relating to persons who have not attained the age of 18;
  - (b) marriage and civil partnership.
- (2) This Part does not apply to discrimination, harassment or victimisation—
  - (a) that is prohibited by Part 4 (premises), 5 (work) or 6 (education), or
  - (b) that would be so prohibited but for an express exception.
- (3) This Part does not apply to—
  - (a) a breach of an equality clause or rule;
  - (b) anything that would be a breach of an equality clause or rule but for section 69 or Part 2 of Schedule 7;
  - (c) a breach of a non-discrimination rule.

##### *Provision of services, etc.*

#### **29 Provision of services, etc.**

- (1) A person (a “service-provider”) concerned with the provision of a service to the public or a section of the public (for payment or not) must not discriminate against a person requiring the service by not providing the person with the service.
- (2) A service-provider (A) must not, in providing the service, discriminate against a person (B)—
  - (a) as to the terms on which A provides the service to B;
  - (b) by terminating the provision of the service to B;
  - (c) by subjecting B to any other detriment.
- (3) A service-provider must not, in relation to the provision of the service, harass—
  - (a) a person requiring the service, or
  - (b) a person to whom the service-provider provides the service.
- (4) A service-provider must not victimise a person requiring the service by not providing the person with the service.
- (5) A service-provider (A) must not, in providing the service, victimise a person (B)—
  - (a) as to the terms on which A provides the service to B;

- (b) by terminating the provision of the service to B;
  - (c) by subjecting B to any other detriment.
- (6) A person must not, in the exercise of a public function that is not the provision of a service to the public or a section of the public, do anything that constitutes discrimination, harassment or victimisation.
- (7) A duty to make reasonable adjustments applies to –
- (a) a service-provider (and see also section 55(7));
  - (b) a person who exercises a public function that is not the provision of a service to the public or a section of the public.
- (8) In the application of section 26 for the purposes of subsection (3), and subsection (6) as it relates to harassment, neither of the following is a relevant protected characteristic –
- (a) religion or belief;
  - (b) sexual orientation.
- (9) In the application of this section, so far as relating to race or religion or belief, to the granting of entry clearance (within the meaning of the Immigration Act 1971), it does not matter whether an act is done within or outside the United Kingdom.
- (10) Subsection (9) does not affect the application of any other provision of this Act to conduct outside England and Wales or Scotland.

### *Supplementary*

## **30 Ships and hovercraft**

- (1) This Part (subject to subsection (2)) applies only in such circumstances as are prescribed in relation to –
- (a) transporting people by ship or hovercraft;
  - (b) a service provided on a ship or hovercraft.
- (2) Section 29(6) applies in relation to the matters referred to in paragraphs (a) and (b) of subsection (1); but in so far as it relates to disability discrimination, section 29(6) applies to those matters only in such circumstances as are prescribed.
- (3) It does not matter whether the ship or hovercraft is within or outside the United Kingdom.
- (4) “Ship” has the same meaning as in the Merchant Shipping Act 1995.
- (5) “Hovercraft” has the same meaning as in the Hovercraft Act 1968.
- (6) Nothing in this section affects the application of any other provision of this Act to conduct outside England and Wales or Scotland.

## **31 Interpretation and exceptions**

- (1) This section applies for the purposes of this Part.
- (2) A reference to the provision of a service includes a reference to the provision of goods or facilities.

- (3) A reference to the provision of a service includes a reference to the provision of a service in the exercise of a public function.
- (4) A public function is a function that is a function of a public nature for the purposes of the Human Rights Act 1998.
- (5) Where an employer arranges for another person to provide a service only to the employer's employees –
  - (a) the employer is not to be regarded as the service-provider, but
  - (b) the employees are to be regarded as a section of the public.
- (6) A reference to a person requiring a service includes a reference to a person who is seeking to obtain or use the service.
- (7) A reference to a service-provider not providing a person with a service includes a reference to –
  - (a) the service-provider not providing the person with a service of the quality that the service-provider usually provides to the public (or the section of it which includes the person), or
  - (b) the service-provider not providing the person with the service in the manner in which, or on the terms on which, the service-provider usually provides the service to the public (or the section of it which includes the person).
- (8) In relation to the provision of a service by either House of Parliament, the service-provider is the Corporate Officer of the House concerned; and if the service involves access to, or use of, a place in the Palace of Westminster which members of the public are allowed to enter, both Corporate Officers are jointly the service-provider.
- (9) Schedule 2 (reasonable adjustments) has effect.
- (10) Schedule 3 (exceptions) has effect.

#### PART 4

#### PREMISES

#### *Preliminary*

### 32 Application of this Part

- (1) This Part does not apply to the following protected characteristics –
  - (a) age;
  - (b) marriage and civil partnership.
- (2) This Part does not apply to discrimination, harassment or victimisation –
  - (a) that is prohibited by Part 5 (work) or Part 6 (education), or
  - (b) that would be so prohibited but for an express exception.
- (3) This Part does not apply to the provision of accommodation if the provision –
  - (a) is generally for the purpose of short stays by individuals who live elsewhere, or
  - (b) is for the purpose only of exercising a public function or providing a service to the public or a section of the public.



- (4) The reference to the exercise of a public function, and the reference to the provision of a service, are to be construed in accordance with Part 3.
- (5) This Part does not apply to—
  - (a) a breach of an equality clause or rule;
  - (b) anything that would be a breach of an equality clause or rule but for section 69 or Part 2 of Schedule 7;
  - (c) a breach of a non-discrimination rule.

*Disposal and management*

**33 Disposals, etc.**

- (1) A person (A) who has the right to dispose of premises must not discriminate against another (B)—
  - (a) as to the terms on which A offers to dispose of the premises to B;
  - (b) by not disposing of the premises to B;
  - (c) in A's treatment of B with respect to things done in relation to persons seeking premises.
- (2) Where an interest in a commonhold unit cannot be disposed of unless a particular person is a party to the disposal, that person must not discriminate against a person by not being a party to the disposal.
- (3) A person who has the right to dispose of premises must not, in connection with anything done in relation to their occupation or disposal, harass—
  - (a) a person who occupies them;
  - (b) a person who applies for them.
- (4) A person (A) who has the right to dispose of premises must not victimise another (B)—
  - (a) as to the terms on which A offers to dispose of the premises to B;
  - (b) by not disposing of the premises to B;
  - (c) in A's treatment of B with respect to things done in relation to persons seeking premises.
- (5) Where an interest in a commonhold unit cannot be disposed of unless a particular person is a party to the disposal, that person must not victimise a person by not being a party to the disposal.
- (6) In the application of section 26 for the purposes of subsection (3), neither of the following is a relevant protected characteristic—
  - (a) religion or belief;
  - (b) sexual orientation.

**34 Permission for disposal**

- (1) A person whose permission is required for the disposal of premises must not discriminate against another by not giving permission for the disposal of the premises to the other.
- (2) A person whose permission is required for the disposal of premises must not, in relation to an application for permission to dispose of the premises, harass a person—



- (a) who applies for permission to dispose of the premises, or
  - (b) to whom the disposal would be made if permission were given.
- (3) A person whose permission is required for the disposal of premises must not victimise another by not giving permission for the disposal of the premises to the other.
- (4) In the application of section 26 for the purposes of subsection (2), neither of the following is a relevant protected characteristic –
- (a) religion or belief;
  - (b) sexual orientation.
- (5) This section does not apply to anything done in the exercise of a judicial function.

### 35 Management

- (1) A person (A) who manages premises must not discriminate against a person (B) who occupies the premises –
- (a) in the way in which A allows B, or by not allowing B, to make use of a benefit or facility;
  - (b) by evicting B (or taking steps for the purpose of securing B’s eviction);
  - (c) by subjecting B to any other detriment.
- (2) A person who manages premises must not, in relation to their management, harass –
- (a) a person who occupies them;
  - (b) a person who applies for them.
- (3) A person (A) who manages premises must not victimise a person (B) who occupies the premises –
- (a) in the way in which A allows B, or by not allowing B, to make use of a benefit or facility;
  - (b) by evicting B (or taking steps for the purpose of securing B’s eviction);
  - (c) by subjecting B to any other detriment.
- (4) In the application of section 26 for the purposes of subsection (2), neither of the following is a relevant protected characteristic –
- (a) religion or belief;
  - (b) sexual orientation.

#### *Reasonable adjustments*

### 36 Leasehold and commonhold premises and common parts

- (1) A duty to make reasonable adjustments applies to –
- (a) a controller of let premises;
  - (b) a controller of premises to let;
  - (c) a commonhold association;
  - (d) a responsible person in relation to common parts.
- (2) A controller of let premises is –
- (a) a person by whom premises are let, or

- (b) a person who manages them.
- (3) A controller of premises to let is –
  - (a) a person who has premises to let, or
  - (b) a person who manages them.
- (4) The reference in subsection (1)(c) to a commonhold association is a reference to the association in its capacity as the person who manages a commonhold unit.
- (5) A responsible person in relation to common parts is –
  - (a) where the premises to which the common parts relate are let (and are not part of commonhold land or in Scotland), a person by whom the premises are let;
  - (b) where the premises to which the common parts relate are part of commonhold land, the commonhold association.
- (6) Common parts are –
  - (a) in relation to let premises (which are not part of commonhold land or in Scotland), the structure and exterior of, and any common facilities within or used in connection with, the building or part of a building which includes the premises;
  - (b) in relation to commonhold land, every part of the commonhold which is not for the time being a commonhold unit in accordance with the commonhold community statement.
- (7) A reference to letting includes a reference to sub-letting; and for the purposes of subsection (1)(a) and (b), a reference to let premises includes premises subject to a right to occupy.
- (8) This section does not apply to premises of such description as may be prescribed.

### **37 Adjustments to common parts in Scotland**

- (1) The Scottish Ministers may by regulations provide that a disabled person is entitled to make relevant adjustments to common parts in relation to premises in Scotland.
- (2) The reference in subsection (1) to a disabled person is a reference to a disabled person who –
  - (a) is a tenant of the premises,
  - (b) is an owner of the premises, or
  - (c) is otherwise entitled to occupy the premises,and uses or intends to use the premises as the person's only or main home.
- (3) Before making regulations under subsection (1), the Scottish Ministers must consult a Minister of the Crown.
- (4) Regulations under subsection (1) may, in particular –
  - (a) prescribe things which are, or which are not, to be treated as relevant adjustments;
  - (b) prescribe circumstances in which the consent of an owner of the common parts is required before a disabled person may make an adjustment;
  - (c) provide that the consent to adjustments is not to be withheld unreasonably;

- (d) prescribe matters to be taken into account, or to be disregarded, in deciding whether it is reasonable to consent to adjustments;
  - (e) prescribe circumstances in which consent to adjustments is to be taken to be withheld;
  - (f) make provision about the imposition of conditions on consent to adjustments;
  - (g) make provision as to circumstances in which the sheriff may make an order authorising a disabled person to carry out adjustments;
  - (h) make provision about the responsibility for costs arising (directly or indirectly) from an adjustment;
  - (i) make provision about the reinstatement of the common parts to the condition they were in before an adjustment was made;
  - (j) make provision about the giving of notice to the owners of the common parts and other persons;
  - (k) make provision about agreements between a disabled person and an owner of the common parts;
  - (l) make provision about the registration of information in the Land Register of Scotland or the recording of documents in the Register of Sasines relating to an entitlement of a disabled person or an obligation on an owner of the common parts;
  - (m) make provision about the effect of such registration or recording;
  - (n) make provision about who is to be treated as being, or as not being, a person entitled to occupy premises otherwise than as tenant or owner.
- (5) In this section –
- “common parts” means, in relation to premises, the structure and exterior of, and any common facilities within or used in connection with, the building or part of a building which includes the premises but only in so far as the structure, exterior and common facilities are not solely owned by the owner of the premises;
  - “relevant adjustments” means, in relation to a disabled person, alterations or additions which are likely to avoid a substantial disadvantage to which the disabled person is put in using the common parts in comparison with persons who are not disabled.

### *Supplementary*

## **38 Interpretation and exceptions**

- (1) This section applies for the purposes of this Part.
- (2) A reference to premises is a reference to the whole or part of the premises.
- (3) A reference to disposing of premises includes, in the case of premises subject to a tenancy, a reference to –
  - (a) assigning the premises,
  - (b) sub-letting them, or
  - (c) parting with possession of them.
- (4) A reference to disposing of premises also includes a reference to granting a right to occupy them.
- (5) A reference to disposing of an interest in a commonhold unit includes a reference to creating an interest in a commonhold unit.

- (6) A reference to a tenancy is to a tenancy created (whether before or after the passing of this Act) –
- (a) by a lease or sub-lease,
  - (b) by an agreement for a lease or sub-lease,
  - (c) by a tenancy agreement, or
  - (d) in pursuance of an enactment,
- and a reference to a tenant is to be construed accordingly.
- (7) A reference to commonhold land, a commonhold association, a commonhold community statement, a commonhold unit or a unit-holder is to be construed in accordance with the Commonhold and Leasehold Reform Act 2002.
- (8) Schedule 4 (reasonable adjustments) has effect.
- (9) Schedule 5 (exceptions) has effect.

## PART 5

### WORK

#### CHAPTER 1

##### EMPLOYMENT, ETC.

##### *Employees*

### 39 Employees and applicants

- (1) An employer (A) must not discriminate against a person (B) –
- (a) in the arrangements A makes for deciding to whom to offer employment;
  - (b) as to the terms on which A offers B employment;
  - (c) by not offering B employment.
- (2) An employer (A) must not discriminate against an employee of A's (B) –
- (a) as to B's terms of employment;
  - (b) in the way A affords B access, or by not affording B access, to opportunities for promotion, transfer or training or for receiving any other benefit, facility or service;
  - (c) by dismissing B;
  - (d) by subjecting B to any other detriment.
- (3) An employer (A) must not victimise a person (B) –
- (a) in the arrangements A makes for deciding to whom to offer employment;
  - (b) as to the terms on which A offers B employment;
  - (c) by not offering B employment.
- (4) An employer (A) must not victimise an employee of A's (B) –
- (a) as to B's terms of employment;
  - (b) in the way A affords B access, or by not affording B access, to opportunities for promotion, transfer or training or for any other benefit, facility or service;

- (c) by dismissing B;
  - (d) by subjecting B to any other detriment.
- (5) A duty to make reasonable adjustments applies to an employer.
- (6) Subsection (1)(b), so far as relating to sex or pregnancy and maternity, does not apply to a term that relates to pay –
- (a) unless, were B to accept the offer, an equality clause or rule would have effect in relation to the term, or
  - (b) if paragraph (a) does not apply, except in so far as making an offer on terms including that term amounts to a contravention of subsection (1)(b) by virtue of section 13, 14 or 18.
- (7) In subsections (2)(c) and (4)(c), the reference to dismissing B includes a reference to the termination of B's employment –
- (a) by the expiry of a period (including a period expiring by reference to an event or circumstance);
  - (b) by an act of B's (including giving notice) in circumstances such that B is entitled, because of A's conduct, to terminate the employment without notice.
- (8) Subsection (7)(a) does not apply if, immediately after the termination, the employment is renewed on the same terms.

#### **40 Employees and applicants: harassment**

- (1) An employer (A) must not, in relation to employment by A, harass a person (B) –
- (a) who is an employee of A's;
  - (b) who has applied to A for employment.
- (2) The circumstances in which A is to be treated as harassing B under subsection (1) include those where –
- (a) a third party harasses B in the course of B's employment, and
  - (b) A failed to take such steps as would have been reasonably practicable to prevent the third party from doing so.
- (3) Subsection (2) does not apply unless A knows that B has been harassed in the course of B's employment on at least two other occasions by a third party; and it does not matter whether the third party is the same or a different person on each occasion.
- (4) A third party is a person other than –
- (a) A, or
  - (b) an employee of A's.

#### **41 Contract workers**

- (1) A principal must not discriminate against a contract worker –
- (a) as to the terms on which the principal allows the worker to do the work;
  - (b) by not allowing the worker to do, or to continue to do, the work;
  - (c) in the way the principal affords the worker access, or by not affording the worker access, to opportunities for receiving a benefit, facility or service;
  - (d) by subjecting the worker to any other detriment.

- (2) A principal must not, in relation to contract work, harass a contract worker.
- (3) A principal must not victimise a contract worker –
  - (a) as to the terms on which the principal allows the worker to do the work;
  - (b) by not allowing the worker to do, or to continue to do, the work;
  - (c) in the way the principal affords the worker access, or by not affording the worker access, to opportunities for receiving a benefit, facility or service;
  - (d) by subjecting the worker to any other detriment.
- (4) A duty to make reasonable adjustments applies to a principal (as well as to the employer of a contract worker).
- (5) A “principal” is a person who makes work available for an individual who is –
  - (a) employed by another person, and
  - (b) supplied by that other person in furtherance of a contract to which the principal is a party (whether or not that other person is a party to it).
- (6) “Contract work” is work such as is mentioned in subsection (5).
- (7) A “contract worker” is an individual supplied to a principal in furtherance of a contract such as is mentioned in subsection (5)(b).

*Police officers*

#### **42 Identity of employer**

- (1) For the purposes of this Part, holding the office of constable is to be treated as employment –
  - (a) by the chief officer, in respect of any act done by the chief officer in relation to a constable or appointment to the office of constable;
  - (b) by the responsible authority, in respect of any act done by the authority in relation to a constable or appointment to the office of constable.
- (2) For the purposes of this Part, holding an appointment as a police cadet is to be treated as employment –
  - (a) by the chief officer, in respect of any act done by the chief officer in relation to a police cadet or appointment as one;
  - (b) by the responsible authority, in respect of any act done by the authority in relation to a police cadet or appointment as one.
- (3) Subsection (1) does not apply to service with the Civil Nuclear Constabulary (as to which, see section 55(2) of the Energy Act 2004).
- (4) Subsection (1) does not apply to a constable at SOCA, SPSA or SCDEA.
- (5) A constable at SOCA or SPSA is to be treated as employed by it, in respect of any act done by it in relation to the constable.
- (6) A constable at SCDEA is to be treated as employed by the Director General of SCDEA, in respect of any act done by the Director General in relation to the constable.

#### **43 Interpretation**

- (1) This section applies for the purposes of section 42.



- (2) “Chief officer” means –
- (a) in relation to an appointment under a relevant Act, the chief officer of police for the police force to which the appointment relates;
  - (b) in relation to any other appointment, the person under whose direction and control the body of constables or other persons to which the appointment relates is;
  - (c) in relation to a constable or other person under the direction and control of a chief officer of police, that chief officer of police;
  - (d) in relation to any other constable or any other person, the person under whose direction and control the constable or other person is.
- (3) “Responsible authority” means –
- (a) in relation to an appointment under a relevant Act, the police authority that maintains the police force to which the appointment relates;
  - (b) in relation to any other appointment, the person by whom a person would (if appointed) be paid;
  - (c) in relation to a constable or other person under the direction and control of a chief officer of police, the police authority that maintains the police force for which that chief officer is the chief officer of police;
  - (d) in relation to any other constable or any other person, the person by whom the constable or other person is paid.
- (4) “Police cadet” means a person appointed to undergo training with a view to becoming a constable.
- (5) “SOCA” means the Serious Organised Crime Agency; and a reference to a constable at SOCA is a reference to a constable seconded to it to serve as a member of its staff.
- (6) “SPSA” means the Scottish Police Services Authority; and a reference to a constable at SPSA is a reference to a constable –
- (a) seconded to it to serve as a member of its staff, and
  - (b) not at SCDEA.
- (7) “SCDEA” means the Scottish Crime and Drugs Enforcement Agency; and a reference to a constable at SCDEA is a reference to a constable who is a police member of it by virtue of paragraph 7(2)(a) or (b) of Schedule 2 to the Police, Public Order and Criminal Justice (Scotland) Act 2006 (asp 10) (secondment).
- (8) For the purposes of this section, the relevant Acts are –
- (a) the Metropolitan Police Act 1829;
  - (b) the City of London Police Act 1839;
  - (c) the Police (Scotland) Act 1967;
  - (d) the Police Act 1996.
- (9) A reference in subsection (2) or (3) to a chief officer of police includes, in relation to Scotland, a reference to a chief constable.

*Partners*

**44 Partnerships**

- (1) A firm or proposed firm must not discriminate against a person –

- (a) in the arrangements it makes for deciding to whom to offer a position as a partner;
  - (b) as to the terms on which it offers the person a position as a partner;
  - (c) by not offering the person a position as a partner.
- (2) A firm (A) must not discriminate against a partner (B) –
- (a) as to the terms on which B is a partner;
  - (b) in the way A affords B access, or by not affording B access, to opportunities for promotion, transfer or training or for receiving any other benefit, facility or service;
  - (c) by expelling B;
  - (d) by subjecting B to any other detriment.
- (3) A firm must not, in relation to a position as a partner, harass –
- (a) a partner;
  - (b) a person who has applied for the position.
- (4) A proposed firm must not, in relation to a position as a partner, harass a person who has applied for the position.
- (5) A firm or proposed firm must not victimise a person –
- (a) in the arrangements it makes for deciding to whom to offer a position as a partner;
  - (b) as to the terms on which it offers the person a position as a partner;
  - (c) by not offering the person a position as a partner.
- (6) A firm (A) must not victimise a partner (B) –
- (a) as to the terms on which B is a partner;
  - (b) in the way A affords B access, or by not affording B access, to opportunities for promotion, transfer or training or for receiving any other benefit, facility or service;
  - (c) by expelling B;
  - (d) by subjecting B to any other detriment.
- (7) A duty to make reasonable adjustments applies to –
- (a) a firm;
  - (b) a proposed firm.
- (8) In the application of this section to a limited partnership within the meaning of the Limited Partnerships Act 1907, “partner” means a general partner within the meaning of that Act.

#### **45 Limited liability partnerships**

- (1) An LLP or proposed LLP must not discriminate against a person –
- (a) in the arrangements it makes for deciding to whom to offer a position as a member;
  - (b) as to the terms on which it offers the person a position as a member;
  - (c) by not offering the person a position as a member.
- (2) An LLP (A) must not discriminate against a member (B) –
- (a) as to the terms on which B is a member;



- (b) in the way A affords B access, or by not affording B access, to opportunities for promotion, transfer or training or for receiving any other benefit, facility or service;
  - (c) by expelling B;
  - (d) by subjecting B to any other detriment.
- (3) An LLP must not, in relation to a position as a member, harass –
  - (a) a member;
  - (b) a person who has applied for the position.
- (4) A proposed LLP must not, in relation to a position as a member, harass a person who has applied for the position.
- (5) An LLP or proposed LLP must not victimise a person –
  - (a) in the arrangements it makes for deciding to whom to offer a position as a member;
  - (b) as to the terms on which it offers the person a position as a member;
  - (c) by not offering the person a position as a member.
- (6) An LLP (A) must not victimise a member (B) –
  - (a) as to the terms on which B is a member;
  - (b) in the way A affords B access, or by not affording B access, to opportunities for promotion, transfer or training or for receiving any other benefit, facility or service;
  - (c) by expelling B;
  - (d) by subjecting B to any other detriment.
- (7) A duty to make reasonable adjustments applies to –
  - (a) an LLP;
  - (b) a proposed LLP.

#### 46 Interpretation

- (1) This section applies for the purposes of sections 44 and 45.
- (2) “Partnership” and “firm” have the same meaning as in the Partnership Act 1890.
- (3) “Proposed firm” means persons proposing to form themselves into a partnership.
- (4) “LLP” means a limited liability partnership (within the meaning of the Limited Liability Partnerships Act 2000).
- (5) “Proposed LLP” means persons proposing to incorporate an LLP with themselves as members.
- (6) A reference to expelling a partner of a firm or a member of an LLP includes a reference to the termination of the person’s position as such –
  - (a) by the expiry of a period (including a period expiring by reference to an event or circumstance);
  - (b) by an act of the person (including giving notice) in circumstances such that the person is entitled, because of the conduct of other partners or members, to terminate the position without notice;
  - (c) (in the case of a partner of a firm) as a result of the dissolution of the partnership.

- (7) Subsection (6)(a) and (c) does not apply if, immediately after the termination, the position is renewed on the same terms.

*The Bar*

**47 Barristers**

- (1) A barrister (A) must not discriminate against a person (B) –
- (a) in the arrangements A makes for deciding to whom to offer a pupillage or tenancy;
  - (b) as to the terms on which A offers B a pupillage or tenancy;
  - (c) by not offering B a pupillage or tenancy.
- (2) A barrister (A) must not discriminate against a person (B) who is a pupil or tenant –
- (a) as to the terms on which B is a pupil or tenant;
  - (b) in the way A affords B access, or by not affording B access, to opportunities for training or gaining experience or for receiving any other benefit, facility or service;
  - (c) by terminating the pupillage;
  - (d) by subjecting B to pressure to leave chambers;
  - (e) by subjecting B to any other detriment.
- (3) A barrister must not, in relation to a pupillage or tenancy, harass –
- (a) the pupil or tenant;
  - (b) a person who has applied for the pupillage or tenancy.
- (4) A barrister (A) must not victimise a person (B) –
- (a) in the arrangements A makes for deciding to whom to offer a pupillage or tenancy;
  - (b) as to the terms on which A offers B a pupillage or tenancy;
  - (c) by not offering B a pupillage or tenancy.
- (5) A barrister (A) must not victimise a person (B) who is a pupil or tenant –
- (a) as to the terms on which B is a pupil or tenant;
  - (b) in the way A affords B access, or by not affording B access, to opportunities for training or gaining experience or for receiving any other benefit, facility or service;
  - (c) by terminating the pupillage;
  - (d) by subjecting B to pressure to leave chambers;
  - (e) by subjecting B to any other detriment.
- (6) A person must not, in relation to instructing a barrister –
- (a) discriminate against a barrister by subjecting the barrister to a detriment;
  - (b) harass the barrister;
  - (c) victimise the barrister.
- (7) A duty to make reasonable adjustments applies to a barrister.
- (8) The preceding provisions of this section (apart from subsection (6)) apply in relation to a barrister’s clerk as they apply in relation to a barrister; and for that

purpose the reference to a barrister's clerk includes a reference to a person who carries out the functions of a barrister's clerk.

- (9) A reference to a tenant includes a reference to a barrister who is permitted to work in chambers (including as a squatter or door tenant); and a reference to a tenancy is to be construed accordingly.

#### 48 Advocates

- (1) An advocate (A) must not discriminate against a person (B) –
- in the arrangements A makes for deciding who to take as A's devil or to whom to offer membership of a stable;
  - as to the terms on which A offers to take B as A's devil or offers B membership of a stable;
  - by not offering to take B as A's devil or not offering B membership of a stable.
- (2) An advocate (A) must not discriminate against a person (B) who is a devil or a member of a stable –
- as to the terms on which B is a devil or a member of the stable;
  - in the way A affords B access, or by not affording B access, to opportunities for training or gaining experience or for receiving any other benefit, facility or service;
  - by terminating A's relationship with B (where B is a devil);
  - by subjecting B to pressure to leave the stable;
  - by subjecting B to any other detriment.
- (3) An advocate must not, in relation to a relationship with a devil or membership of a stable, harass –
- a devil or member;
  - a person who has applied to be taken as the advocate's devil or to become a member of the stable.
- (4) An advocate (A) must not victimise a person (B) –
- in the arrangements A makes for deciding who to take as A's devil or to whom to offer membership of a stable;
  - as to the terms on which A offers to take B as A's devil or offers B membership of a stable;
  - by not offering to take B as A's devil or not offering B membership of a stable.
- (5) An advocate (A) must not victimise a person (B) who is a devil or a member of a stable –
- as to the terms on which B is a devil or a member of the stable;
  - in the way A affords B access, or by not affording B access, to opportunities for training or gaining experience or for receiving any other benefit, facility or service;
  - by terminating A's relationship with B (where B is a devil);
  - by subjecting B to pressure to leave the stable;
  - by subjecting B to any other detriment.
- (6) A person must not, in relation to instructing an advocate –
- discriminate against the advocate by subjecting the advocate to a detriment;

- (b) harass the advocate;
  - (c) victimise the advocate.
- (7) A duty to make reasonable adjustments applies to an advocate.
- (8) This section (apart from subsection (6)) applies in relation to an advocate’s clerk as it applies in relation to an advocate; and for that purpose the reference to an advocate’s clerk includes a reference to a person who carries out the functions of an advocate’s clerk.
- (9) “Advocate” means a practising member of the Faculty of Advocates.

*Office-holders*

**49 Personal offices: appointments, etc.**

- (1) This section applies in relation to personal offices.
- (2) A personal office is an office or post –
- (a) to which a person is appointed to discharge a function personally under the direction of another person, and
  - (b) in respect of which an appointed person is entitled to remuneration.
- (3) A person (A) who has the power to make an appointment to a personal office must not discriminate against a person (B) –
- (a) in the arrangements A makes for deciding to whom to offer the appointment;
  - (b) as to the terms on which A offers B the appointment;
  - (c) by not offering B the appointment.
- (4) A person who has the power to make an appointment to a personal office must not, in relation to the office, harass a person seeking, or being considered for, the appointment.
- (5) A person (A) who has the power to make an appointment to a personal office must not victimise a person (B) –
- (a) in the arrangements A makes for deciding to whom to offer the appointment;
  - (b) as to the terms on which A offers B the appointment;
  - (c) by not offering B the appointment.
- (6) A person (A) who is a relevant person in relation to a personal office must not discriminate against a person (B) appointed to the office –
- (a) as to the terms of B’s appointment;
  - (b) in the way A affords B access, or by not affording B access, to opportunities for promotion, transfer or training or for receiving any other benefit, facility or service;
  - (c) by terminating B’s appointment;
  - (d) by subjecting B to any other detriment.
- (7) A relevant person in relation to a personal office must not, in relation to that office, harass a person appointed to it.
- (8) A person (A) who is a relevant person in relation to a personal office must not victimise a person (B) appointed to the office –

- (a) as to the terms of B’s appointment;
  - (b) in the way A affords B access, or by not affording B access, to opportunities for promotion, transfer or training or for receiving any other benefit, facility or service;
  - (c) by terminating B’s appointment;
  - (d) by subjecting B to any other detriment.
- (9) A duty to make reasonable adjustments applies to—
- (a) a person who has the power to make an appointment to a personal office;
  - (b) a relevant person in relation to a personal office.
- (10) For the purposes of subsection (2)(a), a person is to be regarded as discharging functions personally under the direction of another person if that other person is entitled to direct the person as to when and where to discharge the functions.
- (11) For the purposes of subsection (2)(b), a person is not to be regarded as entitled to remuneration merely because the person is entitled to payments—
- (a) in respect of expenses incurred by the person in discharging the functions of the office or post, or
  - (b) by way of compensation for the loss of income or benefits the person would or might have received had the person not been discharging the functions of the office or post.
- (12) Subsection (3)(b), so far as relating to sex or pregnancy and maternity, does not apply to a term that relates to pay—
- (a) unless, were B to accept the offer, an equality clause or rule would have effect in relation to the term, or
  - (b) if paragraph (a) does not apply, except in so far as making an offer on terms including that term amounts to a contravention of subsection (3)(b) by virtue of section 13, 14 or 18.

## 50 Public offices: appointments, etc.

- (1) This section and section 51 apply in relation to public offices.
- (2) A public office is—
- (a) an office or post, appointment to which is made by a member of the executive;
  - (b) an office or post, appointment to which is made on the recommendation of, or subject to the approval of, a member of the executive;
  - (c) an office or post, appointment to which is made on the recommendation of, or subject to the approval of, the House of Commons, the House of Lords, the National Assembly for Wales or the Scottish Parliament.
- (3) A person (A) who has the power to make an appointment to a public office within subsection (2)(a) or (b) must not discriminate against a person (B)—
- (a) in the arrangements A makes for deciding to whom to offer the appointment;
  - (b) as to the terms on which A offers B the appointment;
  - (c) by not offering B the appointment.

- (4) A person who has the power to make an appointment to a public office within subsection (2)(a) or (b) must not, in relation to the office, harass a person seeking, or being considered for, the appointment.
- (5) A person (A) who has the power to make an appointment to a public office within subsection (2)(a) or (b) must not victimise a person (B) –
  - (a) in the arrangements A makes for deciding to whom to offer the appointment;
  - (b) as to the terms on which A offers B the appointment;
  - (c) by not offering B the appointment.
- (6) A person (A) who is a relevant person in relation to a public office within subsection (2)(a) or (b) must not discriminate against a person (B) appointed to the office –
  - (a) as to B's terms of appointment;
  - (b) in the way A affords B access, or by not affording B access, to opportunities for promotion, transfer or training or for receiving any other benefit, facility or service;
  - (c) by terminating the appointment;
  - (d) by subjecting B to any other detriment.
- (7) A person (A) who is a relevant person in relation to a public office within subsection (2)(c) must not discriminate against a person (B) appointed to the office –
  - (a) as to B's terms of appointment;
  - (b) in the way A affords B access, or by not affording B access, to opportunities for promotion, transfer or training or for receiving any other benefit, facility or service;
  - (c) by subjecting B to any other detriment (other than by terminating the appointment).
- (8) A relevant person in relation to a public office must not, in relation to that office, harass a person appointed to it.
- (9) A person (A) who is a relevant person in relation to a public office within subsection (2)(a) or (b) must not victimise a person (B) appointed to the office –
  - (a) as to B's terms of appointment;
  - (b) in the way A affords B access, or by not affording B access, to opportunities for promotion, transfer or training or for receiving any other benefit, facility or service;
  - (c) by terminating the appointment;
  - (d) by subjecting B to any other detriment.
- (10) A person (A) who is a relevant person in relation to a public office within subsection (2)(c) must not victimise a person (B) appointed to the office –
  - (a) as to B's terms of appointment;
  - (b) in the way A affords B access, or by not affording B access, to opportunities for promotion, transfer or training or for receiving any other benefit, facility or service;
  - (c) by subjecting B to any other detriment (other than by terminating the appointment).
- (11) A duty to make reasonable adjustments applies to –
  - (a) a relevant person in relation to a public office;



- (b) a person who has the power to make an appointment to a public office within subsection (2)(a) or (b).
- (12) Subsection (3)(b), so far as relating to sex or pregnancy and maternity, does not apply to a term that relates to pay –
  - (a) unless, were B to accept the offer, an equality clause or rule would have effect in relation to the term, or
  - (b) if paragraph (a) does not apply, except in so far as making an offer on terms including that term amounts to a contravention of subsection (3)(b) by virtue of section 13, 14 or 18.

## 51 Public offices: recommendations for appointments, etc.

- (1) A person (A) who has the power to make a recommendation for or give approval to an appointment to a public office within section 50(2)(a) or (b), must not discriminate against a person (B) –
  - (a) in the arrangements A makes for deciding who to recommend for appointment or to whose appointment to give approval;
  - (b) by not recommending B for appointment to the office;
  - (c) by making a negative recommendation of B for appointment to the office;
  - (d) by not giving approval to the appointment of B to the office.
- (2) A person who has the power to make a recommendation for or give approval to an appointment to a public office within section 50(2)(a) or (b) must not, in relation to the office, harass a person seeking or being considered for the recommendation or approval.
- (3) A person (A) who has the power to make a recommendation for or give approval to an appointment to a public office within section 50(2)(a) or (b), must not victimise a person (B) –
  - (a) in the arrangements A makes for deciding who to recommend for appointment or to whose appointment to give approval;
  - (b) by not recommending B for appointment to the office;
  - (c) by making a negative recommendation of B for appointment to the office;
  - (d) by not giving approval to the appointment of B to the office.
- (4) A duty to make reasonable adjustments applies to a person who has the power to make a recommendation for or give approval to an appointment to a public office within section 50(2)(a) or (b).
- (5) A reference in this section to a person who has the power to make a recommendation for or give approval to an appointment to a public office within section 50(2)(a) is a reference only to a relevant body which has that power; and for that purpose “relevant body” means a body established –
  - (a) by or in pursuance of an enactment, or
  - (b) by a member of the executive.

## 52 Interpretation and exceptions

- (1) This section applies for the purposes of sections 49 to 51.
- (2) “Personal office” has the meaning given in section 49.

- (3) “Public office” has the meaning given in section 50.
- (4) An office or post which is both a personal office and a public office is to be treated as being a public office only.
- (5) Appointment to an office or post does not include election to it.
- (6) “Relevant person”, in relation to an office, means the person who, in relation to a matter specified in the first column of the table, is specified in the second column (but a reference to a relevant person does not in any case include the House of Commons, the House of Lords, the National Assembly for Wales or the Scottish Parliament).

<i>Matter</i>	<i>Relevant person</i>
A term of appointment	The person who has the power to set the term.
Access to an opportunity	The person who has the power to afford access to the opportunity (or, if there is no such person, the person who has the power to make the appointment).
Terminating an appointment	The person who has the power to terminate the appointment.
Subjecting an appointee to any other detriment	The person who has the power in relation to the matter to which the conduct in question relates (or, if there is no such person, the person who has the power to make the appointment).
Harassing an appointee	The person who has the power in relation to the matter to which the conduct in question relates.

- (7) A reference to terminating a person’s appointment includes a reference to termination of the appointment—
- (a) by the expiry of a period (including a period expiring by reference to an event or circumstance);
  - (b) by an act of the person (including giving notice) in circumstances such that the person is entitled, because of the relevant person’s conduct, to terminate the appointment without notice.
- (8) Subsection (7)(a) does not apply if, immediately after the termination, the appointment is renewed on the same terms.
- (9) Schedule 6 (excluded offices) has effect.

### *Qualifications*

#### **53 Qualifications bodies**

- (1) A qualifications body (A) must not discriminate against a person (B)—



- (a) in the arrangements A makes for deciding upon whom to confer a relevant qualification;
  - (b) as to the terms on which it is prepared to confer a relevant qualification on B;
  - (c) by not conferring a relevant qualification on B.
- (2) A qualifications body (A) must not discriminate against a person (B) upon whom A has conferred a relevant qualification –
- (a) by withdrawing the qualification from B;
  - (b) by varying the terms on which B holds the qualification;
  - (c) by subjecting B to any other detriment.
- (3) A qualifications body must not, in relation to conferment by it of a relevant qualification, harass –
- (a) a person who holds the qualification, or
  - (b) a person who applies for it.
- (4) A qualifications body (A) must not victimise a person (B) –
- (a) in the arrangements A makes for deciding upon whom to confer a relevant qualification;
  - (b) as to the terms on which it is prepared to confer a relevant qualification on B;
  - (c) by not conferring a relevant qualification on B.
- (5) A qualifications body (A) must not victimise a person (B) upon whom A has conferred a relevant qualification –
- (a) by withdrawing the qualification from B;
  - (b) by varying the terms on which B holds the qualification;
  - (c) by subjecting B to any other detriment.
- (6) A duty to make reasonable adjustments applies to a qualifications body.
- (7) The application by a qualifications body of a competence standard to a disabled person is not disability discrimination unless it is discrimination by virtue of section 19.

#### 54 Interpretation

- (1) This section applies for the purposes of section 53.
- (2) A qualifications body is an authority or body which can confer a relevant qualification.
- (3) A relevant qualification is an authorisation, qualification, recognition, registration, enrolment, approval or certification which is needed for, or facilitates engagement in, a particular trade or profession.
- (4) An authority or body is not a qualifications body in so far as –
  - (a) it can confer a qualification to which section 96 applies,
  - (b) it is the responsible body of a school to which section 85 applies,
  - (c) it is the governing body of an institution to which section 91 applies,
  - (d) it exercises functions under the Education Acts, or
  - (e) it exercises functions under the Education (Scotland) Act 1980.

- (5) A reference to conferring a relevant qualification includes a reference to renewing or extending the conferment of a relevant qualification.
- (6) A competence standard is an academic, medical or other standard applied for the purpose of determining whether or not a person has a particular level of competence or ability.

*Employment services*

**55 Employment service-providers**

- (1) A person (an “employment service-provider”) concerned with the provision of an employment service must not discriminate against a person –
  - (a) in the arrangements the service-provider makes for selecting persons to whom to provide, or to whom to offer to provide, the service;
  - (b) as to the terms on which the service-provider offers to provide the service to the person;
  - (c) by not offering to provide the service to the person.
- (2) An employment service-provider (A) must not, in relation to the provision of an employment service, discriminate against a person (B) –
  - (a) as to the terms on which A provides the service to B;
  - (b) by not providing the service to B;
  - (c) by terminating the provision of the service to B;
  - (d) by subjecting B to any other detriment.
- (3) An employment service-provider must not, in relation to the provision of an employment service, harass –
  - (a) a person who asks the service-provider to provide the service;
  - (b) a person for whom the service-provider provides the service.
- (4) An employment service-provider (A) must not victimise a person (B) –
  - (a) in the arrangements A makes for selecting persons to whom to provide, or to whom to offer to provide, the service;
  - (b) as to the terms on which A offers to provide the service to B;
  - (c) by not offering to provide the service to B.
- (5) An employment service-provider (A) must not, in relation to the provision of an employment service, victimise a person (B) –
  - (a) as to the terms on which A provides the service to B;
  - (b) by not providing the service to B;
  - (c) by terminating the provision of the service to B;
  - (d) by subjecting B to any other detriment.
- (6) A duty to make reasonable adjustments applies to an employment service-provider, except in relation to the provision of a vocational service.
- (7) The duty imposed by section 29(7)(a) applies to a person concerned with the provision of a vocational service; but a failure to comply with that duty in relation to the provision of a vocational service is a contravention of this Part for the purposes of Part 9 (enforcement).

## 56 Interpretation

- (1) This section applies for the purposes of section 55.
- (2) The provision of an employment service includes –
  - (a) the provision of vocational training;
  - (b) the provision of vocational guidance;
  - (c) making arrangements for the provision of vocational training or vocational guidance;
  - (d) the provision of a service for finding employment for persons;
  - (e) the provision of a service for supplying employers with persons to do work;
  - (f) the provision of a service in pursuance of arrangements made under section 2 of the Employment and Training Act 1973 (functions of the Secretary of State relating to employment);
  - (g) the provision of a service in pursuance of arrangements made or a direction given under section 10 of that Act (careers services);
  - (h) the exercise of a function in pursuance of arrangements made under section 2(3) of the Enterprise and New Towns (Scotland) Act 1990 (functions of Scottish Enterprise, etc. relating to employment);
  - (i) an assessment related to the conferment of a relevant qualification within the meaning of section 53 above (except in so far as the assessment is by the qualifications body which confers the qualification).
- (3) This section does not apply in relation to training or guidance in so far as it is training or guidance in relation to which another provision of this Part applies.
- (4) This section does not apply in relation to training or guidance for pupils of a school to which section 85 applies in so far as it is training or guidance to which the responsible body of the school has power to afford access (whether as the responsible body of that school or as the responsible body of any other school at which the training or guidance is provided).
- (5) This section does not apply in relation to training or guidance for students of an institution to which section 91 applies in so far as it is training or guidance to which the governing body of the institution has power to afford access.
- (6) “Vocational training” means –
  - (a) training for employment, or
  - (b) work experience (including work experience the duration of which is not agreed until after it begins).
- (7) A reference to the provision of a vocational service is a reference to the provision of an employment service within subsection (2)(a) to (d) (or an employment service within subsection (2)(f) or (g) in so far as it is also an employment service within subsection (2)(a) to (d)); and for that purpose –
  - (a) the references to an employment service within subsection (2)(a) do not include a reference to vocational training within the meaning given by subsection (6)(b), and
  - (b) the references to an employment service within subsection (2)(d) also include a reference to a service for assisting persons to retain employment.
- (8) A reference to training includes a reference to facilities for training.

*Trade organisations*

**57 Trade organisations**

- (1) A trade organisation (A) must not discriminate against a person (B) –
  - (a) in the arrangements A makes for deciding to whom to offer membership of the organisation;
  - (b) as to the terms on which it is prepared to admit B as a member;
  - (c) by not accepting B's application for membership.
- (2) A trade organisation (A) must not discriminate against a member (B) –
  - (a) in the way it affords B access, or by not affording B access, to opportunities for receiving a benefit, facility or service;
  - (b) by depriving B of membership;
  - (c) by varying the terms on which B is a member;
  - (d) by subjecting B to any other detriment.
- (3) A trade organisation must not, in relation to membership of it, harass –
  - (a) a member, or
  - (b) an applicant for membership.
- (4) A trade organisation (A) must not victimise a person (B) –
  - (a) in the arrangements A makes for deciding to whom to offer membership of the organisation;
  - (b) as to the terms on which it is prepared to admit B as a member;
  - (c) by not accepting B's application for membership.
- (5) A trade organisation (A) must not victimise a member (B) –
  - (a) in the way it affords B access, or by not affording B access, to opportunities for receiving a benefit, facility or service;
  - (b) by depriving B of membership;
  - (c) by varying the terms on which B is a member;
  - (d) by subjecting B to any other detriment.
- (6) A duty to make reasonable adjustments applies to a trade organisation.
- (7) A trade organisation is –
  - (a) an organisation of workers,
  - (b) an organisation of employers, or
  - (c) any other organisation whose members carry on a particular trade or profession for the purposes of which the organisation exists.

*Local authority members*

**58 Official business of members**

- (1) A local authority must not discriminate against a member of the authority in relation to the member's carrying out of official business –
  - (a) in the way the authority affords the member access, or by not affording the member access, to opportunities for training or for receiving any other facility;
  - (b) by subjecting the member to any other detriment.

- (2) A local authority must not, in relation to a member's carrying out of official business, harass the member.
- (3) A local authority must not victimise a member of the authority in relation to the member's carrying out of official business –
  - (a) in the way the authority affords the member access, or by not affording the member access, to opportunities for training or for receiving any other facility;
  - (b) by subjecting the member to any other detriment.
- (4) A member of a local authority is not subjected to a detriment for the purposes of subsection (1)(b) or (3)(b) only because the member is –
  - (a) not appointed or elected to an office of the authority,
  - (b) not appointed or elected to, or to an office of, a committee or sub-committee of the authority, or
  - (c) not appointed or nominated in exercise of an appointment power of the authority.
- (5) In subsection (4)(c), an appointment power of a local authority is a power of the authority, or of a group of bodies including the authority, to make –
  - (a) appointments to a body;
  - (b) nominations for appointment to a body.
- (6) A duty to make reasonable adjustments applies to a local authority.

## **59 Interpretation**

- (1) This section applies for the purposes of section 58.
- (2) “Local authority” means –
  - (a) a county council in England;
  - (b) a district council in England;
  - (c) the Greater London Authority;
  - (d) a London borough council;
  - (e) the Common Council of the City of London;
  - (f) the Council of the Isles of Scilly;
  - (g) a parish council in England;
  - (h) a county council in Wales;
  - (i) a community council in Wales;
  - (j) a county borough council in Wales;
  - (k) a council constituted under section 2 of the Local Government etc. (Scotland) Act 1994;
  - (l) a community council in Scotland.
- (3) A Minister of the Crown may by order amend subsection (2) so as to add, vary or omit a reference to a body which exercises functions that have been conferred on a local authority within paragraph (a) to (l).
- (4) A reference to the carrying-out of official business by a person who is a member of a local authority is a reference to the doing of anything by the person –
  - (a) as a member of the authority,

- (b) as a member of a body to which the person is appointed by, or appointed following nomination by, the authority or a group of bodies including the authority, or
  - (c) as a member of any other public body.
- (5) “Member”, in relation to the Greater London Authority, means –
- (a) the Mayor of London;
  - (b) a member of the London Assembly.

### *Recruitment*

#### **60 Enquiries about disability and health**

- (1) A person (A) to whom an application for work is made must not ask about the health of the applicant (B) –
  - (a) before offering work to B, or
  - (b) where A is not in a position to offer work to B, before including B in a pool of applicants from whom A intends (when in a position to do so) to select a person to whom to offer work.
- (2) A contravention of subsection (1) (or a contravention of section 111 or 112 that relates to a contravention of subsection (1)) is enforceable as an unlawful act under Part 1 of the Equality Act 2006 (and, by virtue of section 120(8), is enforceable only by the Commission under that Part).
- (3) A does not contravene a relevant disability provision merely by asking about B’s health; but A’s conduct in reliance on information given in response may be a contravention of a relevant disability provision.
- (4) Subsection (5) applies if B brings proceedings before an employment tribunal on a complaint that A’s conduct in reliance on information given in response to a question about B’s health is a contravention of a relevant disability provision.
- (5) In the application of section 136 to the proceedings, the particulars of the complaint are to be treated for the purposes of subsection (2) of that section as facts from which the tribunal could decide that A contravened the provision.
- (6) This section does not apply to a question that A asks in so far as asking the question is necessary for the purpose of –
  - (a) establishing whether B will be able to comply with a requirement to undergo an assessment or establishing whether a duty to make reasonable adjustments is or will be imposed on A in relation to B in connection with a requirement to undergo an assessment,
  - (b) establishing whether B will be able to carry out a function that is intrinsic to the work concerned,
  - (c) monitoring diversity in the range of persons applying to A for work,
  - (d) taking action to which section 158 would apply if references in that section to persons who share (or do not share) a protected characteristic were references to disabled persons (or persons who are not disabled) and the reference to the characteristic were a reference to disability, or
  - (e) if A applies in relation to the work a requirement to have a particular disability, establishing whether B has that disability.



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- (7) In subsection (6)(b), where A reasonably believes that a duty to make reasonable adjustments would be imposed on A in relation to B in connection with the work, the reference to a function that is intrinsic to the work is to be read as a reference to a function that would be intrinsic to the work once A complied with the duty.
- (8) Subsection (6)(e) applies only if A shows that, having regard to the nature or context of the work –
- (a) the requirement is an occupational requirement, and
  - (b) the application of the requirement is a proportionate means of achieving a legitimate aim.
- (9) “Work” means employment, contract work, a position as a partner, a position as a member of an LLP, a pupillage or tenancy, being taken as a devil, membership of a stable, an appointment to a personal or public office, or the provision of an employment service; and the references in subsection (1) to offering a person work are, in relation to contract work, to be read as references to allowing a person to do the work.
- (10) A reference to offering work is a reference to making a conditional or unconditional offer of work (and, in relation to contract work, is a reference to allowing a person to do the work subject to fulfilment of one or more conditions).
- (11) The following, so far as relating to discrimination within section 13 because of disability, are relevant disability provisions –
- (a) section 39(1)(a) or (c);
  - (b) section 41(1)(b);
  - (c) section 44(1)(a) or (c);
  - (d) section 45(1)(a) or (c);
  - (e) section 47(1)(a) or (c);
  - (f) section 48(1)(a) or (c);
  - (g) section 49(3)(a) or (c);
  - (h) section 50(3)(a) or (c);
  - (i) section 51(1);
  - (j) section 55(1)(a) or (c).
- (12) An assessment is an interview or other process designed to give an indication of a person’s suitability for the work concerned.
- (13) For the purposes of this section, whether or not a person has a disability is to be regarded as an aspect of that person’s health.
- (14) This section does not apply to anything done for the purpose of vetting applicants for work for reasons of national security.

## CHAPTER 2

### OCCUPATIONAL PENSION SCHEMES

#### 61 Non-discrimination rule

- (1) An occupational pension scheme must be taken to include a non-discrimination rule.

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- (2) A non-discrimination rule is a provision by virtue of which a responsible person (A) –
    - (a) must not discriminate against another person (B) in carrying out any of A's functions in relation to the scheme;
    - (b) must not, in relation to the scheme, harass B;
    - (c) must not, in relation to the scheme, victimise B.
  - (3) The provisions of an occupational pension scheme have effect subject to the non-discrimination rule.
  - (4) The following are responsible persons –
    - (a) the trustees or managers of the scheme;
    - (b) an employer whose employees are, or may be, members of the scheme;
    - (c) a person exercising an appointing function in relation to an office the holder of which is, or may be, a member of the scheme.
  - (5) A non-discrimination rule does not apply in relation to a person who is a pension credit member of a scheme.
  - (6) An appointing function is any of the following –
    - (a) the function of appointing a person;
    - (b) the function of terminating a person's appointment;
    - (c) the function of recommending a person for appointment;
    - (d) the function of approving an appointment.
  - (7) A breach of a non-discrimination rule is a contravention of this Part for the purposes of Part 9 (enforcement).
  - (8) It is not a breach of a non-discrimination rule for the employer or the trustees or managers of a scheme to maintain or use in relation to the scheme rules, practices, actions or decisions relating to age which are of a description specified by order by a Minister of the Crown.
  - (9) An order authorising the use of rules, practices, actions or decisions which are not in use before the order comes into force must not be made unless the Minister consults such persons as the Minister thinks appropriate.
  - (10) A non-discrimination rule does not have effect in relation to an occupational pension scheme in so far as an equality rule has effect in relation to it (or would have effect in relation to it but for Part 2 of Schedule 7).
  - (11) A duty to make reasonable adjustments applies to a responsible person.

## 62 Non-discrimination alterations

- (1) This section applies if the trustees or managers of an occupational pension scheme do not have power to make non-discrimination alterations to the scheme.
- (2) This section also applies if the trustees or managers of an occupational pension scheme have power to make non-discrimination alterations to the scheme but the procedure for doing so –
  - (a) is liable to be unduly complex or protracted, or
  - (b) involves obtaining consents which cannot be obtained or which can be obtained only with undue delay or difficulty.



- (3) The trustees or managers may by resolution make non-discrimination alterations to the scheme.
- (4) Non-discrimination alterations may have effect in relation to a period before the date on which they are made.
- (5) Non-discrimination alterations to an occupational pension scheme are such alterations to the scheme as may be required for the provisions of the scheme to have the effect that they have in consequence of section 61(3).

### 63 Communications

- (1) In their application to communications the following provisions apply in relation to a disabled person who is a pension credit member of an occupational pension scheme as they apply in relation to a disabled person who is a deferred member or pensioner member of the scheme—
  - (a) section 61;
  - (b) section 120;
  - (c) section 126;
  - (d) paragraph 19 of Schedule 8 (and such other provisions of that Schedule as apply for the purposes of that paragraph).
- (2) Communications include—
  - (a) the provision of information;
  - (b) the operation of a dispute resolution procedure.

## CHAPTER 3

### EQUALITY OF TERMS

#### *Sex equality*

### 64 Relevant types of work

- (1) Sections 66 to 70 apply where—
  - (a) a person (A) is employed on work that is equal to the work that a comparator of the opposite sex (B) does;
  - (b) a person (A) holding a personal or public office does work that is equal to the work that a comparator of the opposite sex (B) does.
- (2) The references in subsection (1) to the work that B does are not restricted to work done contemporaneously with the work done by A.

### 65 Equal work

- (1) For the purposes of this Chapter, A's work is equal to that of B if it is—
  - (a) like B's work,
  - (b) rated as equivalent to B's work, or
  - (c) of equal value to B's work.
- (2) A's work is like B's work if—
  - (a) A's work and B's work are the same or broadly similar, and

- (b) such differences as there are between their work are not of practical importance in relation to the terms of their work.
- (3) So on a comparison of one person's work with another's for the purposes of subsection (2), it is necessary to have regard to—
  - (a) the frequency with which differences between their work occur in practice, and
  - (b) the nature and extent of the differences.
- (4) A's work is rated as equivalent to B's work if a job evaluation study—
  - (a) gives an equal value to A's job and B's job in terms of the demands made on a worker, or
  - (b) would give an equal value to A's job and B's job in those terms were the evaluation not made on a sex-specific system.
- (5) A system is sex-specific if, for the purposes of one or more of the demands made on a worker, it sets values for men different from those it sets for women.
- (6) A's work is of equal value to B's work if it is—
  - (a) neither like B's work nor rated as equivalent to B's work, but
  - (b) nevertheless equal to B's work in terms of the demands made on A by reference to factors such as effort, skill and decision-making.

#### **66 Sex equality clause**

- (1) If the terms of A's work do not (by whatever means) include a sex equality clause, they are to be treated as including one.
- (2) A sex equality clause is a provision that has the following effect—
  - (a) if a term of A's is less favourable to A than a corresponding term of B's is to B, A's term is modified so as not to be less favourable;
  - (b) if A does not have a term which corresponds to a term of B's that benefits B, A's terms are modified so as to include such a term.
- (3) Subsection (2)(a) applies to a term of A's relating to membership of or rights under an occupational pension scheme only in so far as a sex equality rule would have effect in relation to the term.
- (4) In the case of work within section 65(1)(b), a reference in subsection (2) above to a term includes a reference to such terms (if any) as have not been determined by the rating of the work (as well as those that have).

#### **67 Sex equality rule**

- (1) If an occupational pension scheme does not include a sex equality rule, it is to be treated as including one.
- (2) A sex equality rule is a provision that has the following effect—
  - (a) if a relevant term is less favourable to A than it is to B, the term is modified so as not to be less favourable;
  - (b) if a term confers a relevant discretion capable of being exercised in a way that would be less favourable to A than to B, the term is modified so as to prevent the exercise of the discretion in that way.
- (3) A term is relevant if it is—
  - (a) a term on which persons become members of the scheme, or

- (b) a term on which members of the scheme are treated.
- (4) A discretion is relevant if its exercise in relation to the scheme is capable of affecting—
  - (a) the way in which persons become members of the scheme, or
  - (b) the way in which members of the scheme are treated.
- (5) The reference in subsection (3)(b) to a term on which members of a scheme are treated includes a reference to the term as it has effect for the benefit of dependants of members.
- (6) The reference in subsection (4)(b) to the way in which members of a scheme are treated includes a reference to the way in which they are treated as the scheme has effect for the benefit of dependants of members.
- (7) If the effect of a relevant matter on persons of the same sex differs according to their family, marital or civil partnership status, a comparison for the purposes of this section of the effect of that matter on persons of the opposite sex must be with persons who have the same status.
- (8) A relevant matter is—
  - (a) a relevant term;
  - (b) a term conferring a relevant discretion;
  - (c) the exercise of a relevant discretion in relation to an occupational pension scheme.
- (9) This section, so far as relating to the terms on which persons become members of an occupational pension scheme, does not have effect in relation to pensionable service before 8 April 1976.
- (10) This section, so far as relating to the terms on which members of an occupational pension scheme are treated, does not have effect in relation to pensionable service before 17 May 1990.

## 68 Sex equality rule: consequential alteration of schemes

- (1) This section applies if the trustees or managers of an occupational pension scheme do not have power to make sex equality alterations to the scheme.
- (2) This section also applies if the trustees or managers of an occupational pension scheme have power to make sex equality alterations to the scheme but the procedure for doing so—
  - (a) is liable to be unduly complex or protracted, or
  - (b) involves obtaining consents which cannot be obtained or which can be obtained only with undue delay or difficulty.
- (3) The trustees or managers may by resolution make sex equality alterations to the scheme.
- (4) Sex equality alterations may have effect in relation to a period before the date on which they are made.
- (5) Sex equality alterations to an occupational pension scheme are such alterations to the scheme as may be required to secure conformity with a sex equality rule.

### 69 Defence of material factor

- (1) The sex equality clause in A's terms has no effect in relation to a difference between A's terms and B's terms if the responsible person shows that the difference is because of a material factor reliance on which –
  - (a) does not involve treating A less favourably because of A's sex than the responsible person treats B, and
  - (b) if the factor is within subsection (2), is a proportionate means of achieving a legitimate aim.
- (2) A factor is within this subsection if A shows that, as a result of the factor, A and persons of the same sex doing work equal to A's are put at a particular disadvantage when compared with persons of the opposite sex doing work equal to A's.
- (3) For the purposes of subsection (1), the long-term objective of reducing inequality between men's and women's terms of work is always to be regarded as a legitimate aim.
- (4) A sex equality rule has no effect in relation to a difference between A and B in the effect of a relevant matter if the trustees or managers of the scheme in question show that the difference is because of a material factor which is not the difference of sex.
- (5) "Relevant matter" has the meaning given in section 67.
- (6) For the purposes of this section, a factor is not material unless it is a material difference between A's case and B's.

### 70 Exclusion of sex discrimination provisions

- (1) The relevant sex discrimination provision has no effect in relation to a term of A's that –
  - (a) is modified by, or included by virtue of, a sex equality clause or rule, or
  - (b) would be so modified or included but for section 69 or Part 2 of Schedule 7.
- (2) Neither of the following is sex discrimination for the purposes of the relevant sex discrimination provision –
  - (a) the inclusion in A's terms of a term that is less favourable as referred to in section 66(2)(a);
  - (b) the failure to include in A's terms a corresponding term as referred to in section 66(2)(b).
- (3) The relevant sex discrimination provision is, in relation to work of a description given in the first column of the table, the provision referred to in the second column so far as relating to sex.

<i>Description of work</i>	<i>Provision</i>
Employment	Section 39(2)
Appointment to a personal office	Section 49(6)
Appointment to a public office	Section 50(6)

**71 Sex discrimination in relation to contractual pay**

- (1) This section applies in relation to a term of a person's work –
  - (a) that relates to pay, but
  - (b) in relation to which a sex equality clause or rule has no effect.
- (2) The relevant sex discrimination provision (as defined by section 70) has no effect in relation to the term except in so far as treatment of the person amounts to a contravention of the provision by virtue of section 13 or 14.

*Pregnancy and maternity equality***72 Relevant types of work**

Sections 73 to 76 apply where a woman –

- (a) is employed, or
- (b) holds a personal or public office.

**73 Maternity equality clause**

- (1) If the terms of the woman's work do not (by whatever means) include a maternity equality clause, they are to be treated as including one.
- (2) A maternity equality clause is a provision that, in relation to the terms of the woman's work, has the effect referred to in section 74(1), (6) and (8).
- (3) In the case of a term relating to membership of or rights under an occupational pension scheme, a maternity equality clause has only such effect as a maternity equality rule would have.

**74 Maternity equality clause: pay**

- (1) A term of the woman's work that provides for maternity-related pay to be calculated by reference to her pay at a particular time is, if each of the following three conditions is satisfied, modified as mentioned in subsection (5).
- (2) The first condition is that, after the time referred to in subsection (1) but before the end of the protected period –
  - (a) her pay increases, or
  - (b) it would have increased had she not been on maternity leave.
- (3) The second condition is that the maternity-related pay is not –
  - (a) what her pay would have been had she not been on maternity leave, or
  - (b) the difference between the amount of statutory maternity pay to which she is entitled and what her pay would have been had she not been on maternity leave.
- (4) The third condition is that the terms of her work do not provide for the maternity-related pay to be subject to –
  - (a) an increase as mentioned in subsection (2)(a), or
  - (b) an increase that would have occurred as mentioned in subsection (2)(b).
- (5) The modification referred to in subsection (1) is a modification to provide for the maternity-related pay to be subject to –
  - (a) any increase as mentioned in subsection (2)(a), or

- (b) any increase that would have occurred as mentioned in subsection (2)(b).
- (6) A term of her work that –
  - (a) provides for pay within subsection (7), but
  - (b) does not provide for her to be given the pay in circumstances in which she would have been given it had she not been on maternity leave,
 is modified so as to provide for her to be given it in circumstances in which it would normally be given.
- (7) Pay is within this subsection if it is –
  - (a) pay (including pay by way of bonus) in respect of times before the woman is on maternity leave,
  - (b) pay by way of bonus in respect of times when she is on compulsory maternity leave, or
  - (c) pay by way of bonus in respect of times after the end of the protected period.
- (8) A term of the woman’s work that –
  - (a) provides for pay after the end of the protected period, but
  - (b) does not provide for it to be subject to an increase to which it would have been subject had she not been on maternity leave,
 is modified so as to provide for it to be subject to the increase.
- (9) Maternity-related pay is pay (other than statutory maternity pay) to which a woman is entitled –
  - (a) as a result of being pregnant, or
  - (b) in respect of times when she is on maternity leave.
- (10) A reference to the protected period is to be construed in accordance with section 18.

## **75 Maternity equality rule**

- (1) If an occupational pension scheme does not include a maternity equality rule, it is to be treated as including one.
- (2) A maternity equality rule is a provision that has the effect set out in subsections (3) and (4).
- (3) If a relevant term does not treat time when the woman is on maternity leave as it treats time when she is not, the term is modified so as to treat time when she is on maternity leave as time when she is not.
- (4) If a term confers a relevant discretion capable of being exercised so that time when she is on maternity leave is treated differently from time when she is not, the term is modified so as not to allow the discretion to be exercised in that way.
- (5) A term is relevant if it is –
  - (a) a term relating to membership of the scheme,
  - (b) a term relating to the accrual of rights under the scheme, or
  - (c) a term providing for the determination of the amount of a benefit payable under the scheme.
- (6) A discretion is relevant if its exercise is capable of affecting –



- (a) membership of the scheme,
  - (b) the accrual of rights under the scheme, or
  - (c) the determination of the amount of a benefit payable under the scheme.
- (7) This section does not require the woman’s contributions to the scheme in respect of time when she is on maternity leave to be determined otherwise than by reference to the amount she is paid in respect of that time.
- (8) This section, so far as relating to time when she is on ordinary maternity leave but is not being paid by her employer, applies only in a case where the expected week of childbirth began on or after 6 April 2003.
- (9) This section, so far as relating to time when she is on additional maternity leave but is not being paid by her employer –
- (a) does not apply to the accrual of rights under the scheme in any case;
  - (b) applies for other purposes only in a case where the expected week of childbirth began on or after 5 October 2008.
- (10) In this section –
- (a) a reference to being on maternity leave includes a reference to having been on maternity leave, and
  - (b) a reference to being paid by the employer includes a reference to receiving statutory maternity pay from the employer.

## 76 Exclusion of pregnancy and maternity discrimination provisions

- (1) The relevant pregnancy and maternity discrimination provision has no effect in relation to a term of the woman’s work that is modified by a maternity equality clause or rule.
- (2) The inclusion in the woman’s terms of a term that requires modification by virtue of section 73(2) or (3) is not pregnancy and maternity discrimination for the purposes of the relevant pregnancy and maternity discrimination provision.
- (3) The relevant pregnancy and maternity discrimination provision is, in relation to a description of work given in the first column of the table, the provision referred to in the second column so far as relating to pregnancy and maternity.

<i>Description of work</i>	<i>Provision</i>
Employment	Section 39(2)
Appointment to a personal office	Section 49(6)
Appointment to a public office	Section 50(6)

### *Disclosure of information*

## 77 Discussions about pay

- (1) A term of a person’s work that purports to prevent or restrict the person (P) from disclosing or seeking to disclose information about the terms of P’s work

is unenforceable against P in so far as P makes or seeks to make a relevant pay disclosure.

- (2) A term of a person’s work that purports to prevent or restrict the person (P) from seeking disclosure of information from a colleague about the terms of the colleague’s work is unenforceable against P in so far as P seeks a relevant pay disclosure from the colleague; and “colleague” includes a former colleague in relation to the work in question.
- (3) A disclosure is a relevant pay disclosure if made for the purpose of enabling the person who makes it, or the person to whom it is made, to find out whether or to what extent there is, in relation to the work in question, a connection between pay and having (or not having) a particular protected characteristic.
- (4) The following are to be treated as protected acts for the purposes of the relevant victimisation provision—
  - (a) seeking a disclosure that would be a relevant pay disclosure;
  - (b) making or seeking to make a relevant pay disclosure;
  - (c) receiving information disclosed in a relevant pay disclosure.
- (5) The relevant victimisation provision is, in relation to a description of work specified in the first column of the table, section 27 so far as it applies for the purposes of a provision mentioned in the second column.

<i>Description of work</i>	<i>Provision by virtue of which section 27 has effect</i>
Employment	Section 39(3) or (4)
Appointment to a personal office	Section 49(5) or (8)
Appointment to a public office	Section 50(5) or (9)

## 78 Gender pay gap information

- (1) Regulations may require employers to publish information relating to the pay of employees for the purpose of showing whether, by reference to factors of such description as is prescribed, there are differences in the pay of male and female employees.
- (2) This section does not apply to—
  - (a) an employer who has fewer than 250 employees;
  - (b) a person specified in Schedule 19;
  - (c) a government department or part of the armed forces not specified in that Schedule.
- (3) The regulations may prescribe—
  - (a) descriptions of employer;
  - (b) descriptions of employee;
  - (c) how to calculate the number of employees that an employer has;
  - (d) descriptions of information;
  - (e) the time at which information is to be published;
  - (f) the form and manner in which it is to be published.



- (4) Regulations under subsection (3)(e) may not require an employer, after the first publication of information, to publish information more frequently than at intervals of 12 months.
- (5) The regulations may make provision for a failure to comply with the regulations –
  - (a) to be an offence punishable on summary conviction by a fine not exceeding level 5 on the standard scale;
  - (b) to be enforced, otherwise than as an offence, by such means as are prescribed.
- (6) The reference to a failure to comply with the regulations includes a reference to a failure by a person acting on behalf of an employer.

### *Supplementary*

## **79 Comparators**

- (1) This section applies for the purposes of this Chapter.
- (2) If A is employed, B is a comparator if subsection (3) or (4) applies.
- (3) This subsection applies if –
  - (a) B is employed by A’s employer or by an associate of A’s employer, and
  - (b) A and B work at the same establishment.
- (4) This subsection applies if –
  - (a) B is employed by A’s employer or an associate of A’s employer,
  - (b) B works at an establishment other than the one at which A works, and
  - (c) common terms apply at the establishments (either generally or as between A and B).
- (5) If A holds a personal or public office, B is a comparator if –
  - (a) B holds a personal or public office, and
  - (b) the person responsible for paying A is also responsible for paying B.
- (6) If A is a relevant member of the House of Commons staff, B is a comparator if –
  - (a) B is employed by the person who is A’s employer under subsection (6) of section 195 of the Employment Rights Act 1996, or
  - (b) if subsection (7) of that section applies in A’s case, B is employed by the person who is A’s employer under that subsection.
- (7) If A is a relevant member of the House of Lords staff, B is a comparator if B is also a relevant member of the House of Lords staff.
- (8) Section 42 does not apply to this Chapter; accordingly, for the purposes of this Chapter only, holding the office of constable is to be treated as holding a personal office.
- (9) For the purposes of this section, employers are associated if –
  - (a) one is a company of which the other (directly or indirectly) has control, or
  - (b) both are companies of which a third person (directly or indirectly) has control.

## **80 Interpretation and exceptions**

- (1) This section applies for the purposes of this Chapter.
- (2) The terms of a person's work are –
  - (a) if the person is employed, the terms of the person's employment that are in the person's contract of employment, contract of apprenticeship or contract to do work personally;
  - (b) if the person holds a personal or public office, the terms of the person's appointment to the office.
- (3) If work is not done at an establishment, it is to be treated as done at the establishment with which it has the closest connection.
- (4) A person (P) is the responsible person in relation to another person if –
  - (a) P is the other's employer;
  - (b) P is responsible for paying remuneration in respect of a personal or public office that the other holds.
- (5) A job evaluation study is a study undertaken with a view to evaluating, in terms of the demands made on a person by reference to factors such as effort, skill and decision-making, the jobs to be done –
  - (a) by some or all of the workers in an undertaking or group of undertakings, or
  - (b) in the case of the armed forces, by some or all of the members of the armed forces.
- (6) In the case of Crown employment, the reference in subsection (5)(a) to an undertaking is to be construed in accordance with section 191(4) of the Employment Rights Act 1996.
- (7) "Civil partnership status" has the meaning given in section 124(1) of the Pensions Act 1995.
- (8) Schedule 7 (exceptions) has effect.

## **CHAPTER 4**

### SUPPLEMENTARY

## **81 Ships and hovercraft**

- (1) This Part applies in relation to –
  - (a) work on ships,
  - (b) work on hovercraft, and
  - (c) seafarers,only in such circumstances as are prescribed.
- (2) For the purposes of this section, it does not matter whether employment arises or work is carried out within or outside the United Kingdom.
- (3) "Ship" has the same meaning as in the Merchant Shipping Act 1995.
- (4) "Hovercraft" has the same meaning as in the Hovercraft Act 1968.
- (5) "Seafarer" means a person employed or engaged in any capacity on board a ship or hovercraft.

- (6) Nothing in this section affects the application of any other provision of this Act to conduct outside England and Wales or Scotland.

## 82 Offshore work

- (1) Her Majesty may by Order in Council provide that in the case of persons in offshore work –
- (a) specified provisions of this Part apply (with or without modification);
  - (b) Northern Ireland legislation making provision for purposes corresponding to any of the purposes of this Part applies (with or without modification).
- (2) The Order may –
- (a) provide for these provisions, as applied by the Order, to apply to individuals (whether or not British citizens) and bodies corporate (whether or not incorporated under the law of a part of the United Kingdom), whether or not such application affects activities outside the United Kingdom;
  - (b) make provision for conferring jurisdiction on a specified court or class of court or on employment tribunals in respect of offences, causes of action or other matters arising in connection with offshore work;
  - (c) exclude from the operation of section 3 of the Territorial Waters Jurisdiction Act 1878 (consents required for prosecutions) proceedings for offences under the provisions mentioned in subsection (1) in connection with offshore work;
  - (d) provide that such proceedings must not be brought without such consent as may be required by the Order.
- (3) “Offshore work” is work for the purposes of –
- (a) activities in the territorial sea adjacent to the United Kingdom,
  - (b) activities such as are mentioned in subsection (2) of section 11 of the Petroleum Act 1998 in waters within subsection (8)(b) or (c) of that section, or
  - (c) activities mentioned in paragraphs (a) and (b) of section 87(1) of the Energy Act 2004 in waters to which that section applies.
- (4) Work includes employment, contract work, a position as a partner or as a member of an LLP, or an appointment to a personal or public office.
- (5) Northern Ireland legislation includes an enactment contained in, or in an instrument under, an Act that forms part of the law of Northern Ireland.
- (6) In the application to Northern Ireland of subsection (2)(b), the reference to employment tribunals is to be read as a reference to industrial tribunals.
- (7) Nothing in this section affects the application of any other provision of this Act to conduct outside England and Wales or Scotland.

## 83 Interpretation and exceptions

- (1) This section applies for the purposes of this Part.
- (2) “Employment” means –
- (a) employment under a contract of employment, a contract of apprenticeship or a contract personally to do work;

- (b) Crown employment;
  - (c) employment as a relevant member of the House of Commons staff;
  - (d) employment as a relevant member of the House of Lords staff.
- (3) This Part applies to service in the armed forces as it applies to employment by a private person; and for that purpose –
- (a) references to terms of employment, or to a contract of employment, are to be read as including references to terms of service;
  - (b) references to associated employers are to be ignored.
- (4) A reference to an employer or an employee, or to employing or being employed, is (subject to section 212(11)) to be read with subsections (2) and (3); and a reference to an employer also includes a reference to a person who has no employees but is seeking to employ one or more other persons.
- (5) “Relevant member of the House of Commons staff” has the meaning given in section 195 of the Employment Rights Act 1996; and such a member of staff is an employee of –
- (a) the person who is the employer of that member under subsection (6) of that section, or
  - (b) if subsection (7) of that section applies in the case of that member, the person who is the employer of that member under that subsection.
- (6) “Relevant member of the House of Lords staff” has the meaning given in section 194 of that Act (which provides that such a member of staff is an employee of the Corporate Officer of the House of Lords).
- (7) In the case of a person in Crown employment, or in employment as a relevant member of the House of Commons staff, a reference to the person’s dismissal is a reference to the termination of the person’s employment.
- (8) A reference to a personal or public office, or to an appointment to a personal or public office, is to be construed in accordance with section 52.
- (9) “Crown employment” has the meaning given in section 191 of the Employment Rights Act 1996.
- (10) Schedule 8 (reasonable adjustments) has effect.
- (11) Schedule 9 (exceptions) has effect.

## PART 6

### EDUCATION

#### CHAPTER 1

##### SCHOOLS

## 84 Application of this Chapter

This Chapter does not apply to the following protected characteristics –

- (a) age;
- (b) marriage and civil partnership.

**85 Pupils: admission and treatment, etc.**

- (1) The responsible body of a school to which this section applies must not discriminate against a person—
  - (a) in the arrangements it makes for deciding who is offered admission as a pupil;
  - (b) as to the terms on which it offers to admit the person as a pupil;
  - (c) by not admitting the person as a pupil.
- (2) The responsible body of such a school must not discriminate against a pupil—
  - (a) in the way it provides education for the pupil;
  - (b) in the way it affords the pupil access to a benefit, facility or service;
  - (c) by not providing education for the pupil;
  - (d) by not affording the pupil access to a benefit, facility or service;
  - (e) by excluding the pupil from the school;
  - (f) by subjecting the pupil to any other detriment.
- (3) The responsible body of such a school must not harass—
  - (a) a pupil;
  - (b) a person who has applied for admission as a pupil.
- (4) The responsible body of such a school must not victimise a person—
  - (a) in the arrangements it makes for deciding who is offered admission as a pupil;
  - (b) as to the terms on which it offers to admit the person as a pupil;
  - (c) by not admitting the person as a pupil.
- (5) The responsible body of such a school must not victimise a pupil—
  - (a) in the way it provides education for the pupil;
  - (b) in the way it affords the pupil access to a benefit, facility or service;
  - (c) by not providing education for the pupil;
  - (d) by not affording the pupil access to a benefit, facility or service;
  - (e) by excluding the pupil from the school;
  - (f) by subjecting the pupil to any other detriment.
- (6) A duty to make reasonable adjustments applies to the responsible body of such a school.
- (7) In relation to England and Wales, this section applies to—
  - (a) a school maintained by a local authority;
  - (b) an independent educational institution (other than a special school);
  - (c) a special school (not maintained by a local authority).
- (8) In relation to Scotland, this section applies to—
  - (a) a school managed by an education authority;
  - (b) an independent school;
  - (c) a school in respect of which the managers are for the time being receiving grants under section 73(c) or (d) of the Education (Scotland) Act 1980.
- (9) The responsible body of a school to which this section applies is—
  - (a) if the school is within subsection (7)(a), the local authority or governing body;

- (b) if it is within subsection (7)(b) or (c), the proprietor;
- (c) if it is within subsection (8)(a), the education authority;
- (d) if it is within subsection (8)(b), the proprietor;
- (e) if it is within subsection (8)(c), the managers.

- (10) In the application of section 26 for the purposes of subsection (3), none of the following is a relevant protected characteristic –
- (a) gender reassignment;
  - (b) religion or belief;
  - (c) sexual orientation.

**86 Victimization of pupils, etc. for conduct of parents, etc.**

- (1) This section applies for the purposes of section 27 in its application to section 85(4) or (5).
- (2) The references to B in paragraphs (a) and (b) of subsection (1) of section 27 include a reference to a parent or sibling of the child in question.
- (3) Giving false evidence or information, or making a false allegation, in good faith is not a protected act in a case where –
  - (a) the evidence or information is given, or the allegation is made, by a parent or sibling of the child, and
  - (b) the child has acted in bad faith.
- (4) Giving false evidence or information, or making a false allegation, in bad faith, is a protected act in a case where –
  - (a) the evidence or information is given, or the allegation is made, by a parent or sibling of the child, and
  - (b) the child has acted in good faith.
- (5) In this section –
  - “child” means a person who has not attained the age of 18;
  - “sibling” means a brother or sister, a half-brother or half-sister, or a stepbrother or stepsister.

**87 Application of certain powers under Education Act 1996**

- (1) Sections 496 and 497 of the Education Act 1996 (powers to give directions where responsible body of school in default of obligations, etc.) apply to the performance of a duty under section 85.
- (2) But neither of sections 496 and 497 of that Act applies to the performance of a duty under that section by the proprietor of an independent educational institution (other than a special school).

**88 Disabled pupils: accessibility**

Schedule 10 (accessibility) has effect.

**89 Interpretation and exceptions**

- (1) This section applies for the purposes of this Chapter.



- (2) Nothing in this Chapter applies to anything done in connection with the content of the curriculum.
- (3) “Pupil” –
  - (a) in relation to England and Wales, has the meaning given in section 3(1) of the Education Act 1996;
  - (b) in relation to Scotland, has the meaning given in section 135(1) of the Education (Scotland) Act 1980.
- (4) “Proprietor” –
  - (a) in relation to a school in England and Wales, has the meaning given in section 579(1) of the Education Act 1996;
  - (b) in relation to a school in Scotland, has the meaning given in section 135(1) of the Education (Scotland) Act 1980.
- (5) “School” –
  - (a) in relation to England and Wales, has the meaning given in section 4 of the Education Act 1996;
  - (b) in relation to Scotland, has the meaning given in section 135(1) of the Education (Scotland) Act 1980.
- (6) A reference to a school includes a reference to an independent educational institution in England; and a reference to an independent educational institution in England is to be construed in accordance with Chapter 1 of Part 4 of the Education and Skills Act 2008.
- (7) A reference to an independent educational institution is a reference to –
  - (a) an independent educational institution in England, or
  - (b) an independent school in Wales.
- (8) “Independent school” –
  - (a) in relation to Wales, has the meaning given in section 463 of the Education Act 1996;
  - (b) in relation to Scotland, has the meaning given in section 135(1) of the Education (Scotland) Act 1980.
- (9) “Special school” has the meaning given in section 337 of the Education Act 1996.
- (10) “Local authority” means –
  - (a) in relation to England, an English local authority within the meaning of section 162 of the Education and Inspections Act 2006;
  - (b) in relation to Wales, a Welsh local authority within the meaning of that section.
- (11) “Education authority”, in relation to Scotland, has the meaning given in section 135(1) of the Education (Scotland) Act 1980.
- (12) Schedule 11 (exceptions) has effect.

## CHAPTER 2

### FURTHER AND HIGHER EDUCATION

#### **90 Application of this Chapter**

This Chapter does not apply to the protected characteristic of marriage and civil partnership.

#### **91 Students: admission and treatment, etc.**

- (1) The responsible body of an institution to which this section applies must not discriminate against a person—
  - (a) in the arrangements it makes for deciding who is offered admission as a student;
  - (b) as to the terms on which it offers to admit the person as a student;
  - (c) by not admitting the person as a student.
- (2) The responsible body of such an institution must not discriminate against a student—
  - (a) in the way it provides education for the student;
  - (b) in the way it affords the student access to a benefit, facility or service;
  - (c) by not providing education for the student;
  - (d) by not affording the student access to a benefit, facility or service;
  - (e) by excluding the student;
  - (f) by subjecting the student to any other detriment.
- (3) The responsible body of such an institution must not discriminate against a disabled person—
  - (a) in the arrangements it makes for deciding upon whom to confer a qualification;
  - (b) as to the terms on which it is prepared to confer a qualification on the person;
  - (c) by not conferring a qualification on the person;
  - (d) by withdrawing a qualification from the person or varying the terms on which the person holds it.
- (4) Subsection (3) applies only to disability discrimination.
- (5) The responsible body of such an institution must not harass—
  - (a) a student;
  - (b) a person who has applied for admission as a student;
  - (c) a disabled person who holds or has applied for a qualification conferred by the institution.
- (6) The responsible body of such an institution must not victimise a person—
  - (a) in the arrangements it makes for deciding who is offered admission as a student;
  - (b) as to the terms on which it offers to admit the person as a student;
  - (c) by not admitting the person as a student.
- (7) The responsible body of such an institution must not victimise a student—
  - (a) in the way it provides education for the student;



- (b) in the way it affords the student access to a benefit, facility or service;
  - (c) by not providing education for the student;
  - (d) by not affording the student access to a benefit, facility or service;
  - (e) by excluding the student;
  - (f) by subjecting the student to any other detriment.
- (8) The responsible body of such an institution must not victimise a disabled person –
- (a) in the arrangements it makes for deciding upon whom to confer a qualification;
  - (b) as to the terms on which it is prepared to confer a qualification on the person;
  - (c) by not conferring a qualification on the person;
  - (d) by withdrawing a qualification from the person or varying the terms on which the person holds it.
- (9) A duty to make reasonable adjustments applies to the responsible body of such an institution.
- (10) In relation to England and Wales, this section applies to –
- (a) a university;
  - (b) any other institution within the higher education sector;
  - (c) an institution within the further education sector.
- (11) In relation to Scotland, this section applies to –
- (a) a university;
  - (b) a designated institution;
  - (c) a college of further education.
- (12) A responsible body is –
- (a) in the case of an institution within subsection (10)(a), (b) or (c), the governing body;
  - (b) in the case of an institution within subsection (11)(a) or (b), the governing body;
  - (c) in the case of a college of further education under the management of a board of management, the board of management;
  - (d) in the case of any other college of further education, any board of governors of the college or any person responsible for the management of the college, whether or not formally constituted as a governing body or board of governors.

## 92 Further and higher education courses

- (1) The responsible body in relation to a course to which this section applies must not discriminate against a person –
- (a) in the arrangements it makes for deciding who is enrolled on the course;
  - (b) as to the terms on which it offers to enrol the person on the course;
  - (c) by not accepting the person’s application for enrolment.
- (2) The responsible body in relation to such a course must not discriminate against a person who is enrolled on the course in the services it provides or offers to provide.

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- (3) The responsible body in relation to such a course must not harass a person who –
- (a) seeks enrolment on the course;
  - (b) is enrolled on the course;
  - (c) is a user of services provided by the body in relation to the course.
- (4) The responsible body in relation to such a course must not victimise a person –
- (a) in the arrangements it makes for deciding who is enrolled on the course;
  - (b) as to the terms on which it offers to enrol the person on the course;
  - (c) by not accepting the person’s application for enrolment.
- (5) The responsible body in relation to such a course must not victimise a person who is enrolled on the course in the services it provides or offers to provide.
- (6) A duty to make reasonable adjustments applies to the responsible body.
- (7) This section applies to –
- (a) a course of further or higher education secured by a responsible body in England or Wales;
  - (b) a course of education provided by the governing body of a maintained school under section 80 of the School Standards and Framework Act 1998;
  - (c) a course of further education secured by an education authority in Scotland.
- (8) A responsible body is –
- (a) a local authority in England or Wales, for the purposes of subsection (7)(a);
  - (b) the governing body of a maintained school, for the purposes of subsection (7)(b);
  - (c) an education authority in Scotland, for the purposes of subsection (7)(c).
- (9) In this section –
- “course”, in relation to further education, includes each component part of a course if there is no requirement imposed on persons registered for a component part of the course to register for another component part of the course;
- “enrolment” includes registration for a component part of a course;
- “maintained school” has the meaning given in section 20(7) of the School Standards and Framework Act 1998;
- “services” means services of any description which are provided wholly or mainly for persons enrolled on a course to which this section applies.

### 93 Recreational or training facilities

- (1) The responsible body in relation to facilities to which this section applies must not discriminate against a person –
- (a) in the arrangements it makes for deciding who is provided with the facilities;
  - (b) as to the terms on which it offers to provide the facilities to the person;
  - (c) by not accepting the person’s application for provision of the facilities.

- (2) The responsible body in relation to such facilities must not discriminate against a person who is provided with the facilities in the services it provides or offers to provide.
- (3) The responsible body in relation to such facilities must not harass a person who—
  - (a) seeks to have the facilities provided;
  - (b) is provided with the facilities;
  - (c) is a user of services provided by the body in relation to the facilities.
- (4) The responsible body in relation to such facilities must not victimise a person—
  - (a) in the arrangements it makes for deciding who is provided with the facilities;
  - (b) as to the terms on which it offers to provide the facilities to the person;
  - (c) by not accepting the person’s application for provision of the facilities.
- (5) The responsible body in relation to such facilities must not victimise a person who is provided with the facilities in the services it provides or offers to provide.
- (6) A duty to make reasonable adjustments applies to the responsible body.
- (7) This section applies to—
  - (a) facilities secured by a local authority in England under section 507A or 507B of the Education Act 1996;
  - (b) facilities secured by a local authority in Wales under section 508 of that Act;
  - (c) recreational or training facilities provided by an education authority in Scotland.
- (8) A responsible body is—
  - (a) a local authority in England, for the purposes of subsection (7)(a);
  - (b) a local authority in Wales, for the purposes of subsection (7)(b);
  - (c) an education authority in Scotland, for the purposes of subsection (7)(c).
- (9) This section does not apply to the protected characteristic of age, so far as relating to persons who have not attained the age of 18.

#### **94 Interpretation and exceptions**

- (1) This section applies for the purposes of this Chapter.
- (2) Nothing in this Chapter applies to anything done in connection with the content of the curriculum.
- (3) A reference to a student, in relation to an institution, is a reference to a person for whom education is provided by the institution.
- (4) A reference to a university includes a reference to a university college and a college, school or hall of a university.
- (5) A reference to an institution within the further or higher education sector is to be construed in accordance with section 91 of the Further and Higher Education Act 1992.
- (6) “Further education” —

- (a) in relation to England and Wales, has the meaning given in section 2 of the Education Act 1996;
  - (b) in relation to Scotland, has the meaning given in section 1(3) of the Further and Higher Education (Scotland) Act 1992.
- (7) “Higher education” –
- (a) in relation to England and Wales, means education provided by means of a course of a description mentioned in Schedule 6 to the Education Reform Act 1988;
  - (b) in relation to Scotland, has the meaning given in section 38 of the Further and Higher Education (Scotland) Act 1992.
- (8) “College of further education” has the meaning given in section 36 of the Further and Higher Education (Scotland) Act 1992.
- (9) “Designated institution” has the meaning given in section 44 of that Act.
- (10) “Local authority” means –
- (a) in relation to England, an English local authority within the meaning of section 162 of the Education and Inspections Act 2006;
  - (b) in relation to Wales, a Welsh local authority within the meaning of that section.
- (11) “Education authority” has the meaning given by section 135(1) of the Education (Scotland) Act 1980.
- (12) Schedule 12 (exceptions) has effect.

### CHAPTER 3

#### GENERAL QUALIFICATIONS BODIES

#### 95 Application of this Chapter

This Chapter does not apply to the protected characteristic of marriage and civil partnership.

#### 96 Qualifications bodies

- (1) A qualifications body (A) must not discriminate against a person (B) –
- (a) in the arrangements A makes for deciding upon whom to confer a relevant qualification;
  - (b) as to the terms on which it is prepared to confer a relevant qualification on B;
  - (c) by not conferring a relevant qualification on B.
- (2) A qualifications body (A) must not discriminate against a person (B) upon whom A has conferred a relevant qualification –
- (a) by withdrawing the qualification from B;
  - (b) by varying the terms on which B holds the qualification;
  - (c) by subjecting B to any other detriment.
- (3) A qualifications body must not, in relation to conferment by it of a relevant qualification, harass –
- (a) a person who holds the qualification, or

- (b) a person who applies for it.
- (4) A qualifications body (A) must not victimise a person (B) –
- (a) in the arrangements A makes for deciding upon whom to confer a relevant qualification;
  - (b) as to the terms on which it is prepared to confer a relevant qualification on B;
  - (c) by not conferring a relevant qualification on B.
- (5) A qualifications body (A) must not victimise a person (B) upon whom A has conferred a relevant qualification –
- (a) by withdrawing the qualification from B;
  - (b) by varying the terms on which B holds the qualification;
  - (c) by subjecting B to any other detriment.
- (6) A duty to make reasonable adjustments applies to a qualifications body.
- (7) Subsection (6) does not apply to the body in so far as the appropriate regulator specifies provisions, criteria or practices in relation to which the body –
- (a) is not subject to a duty to make reasonable adjustments;
  - (b) is subject to a duty to make reasonable adjustments, but in relation to which such adjustments as the regulator specifies should not be made.
- (8) For the purposes of subsection (7) the appropriate regulator must have regard to –
- (a) the need to minimise the extent to which disabled persons are disadvantaged in attaining the qualification because of their disabilities;
  - (b) the need to secure that the qualification gives a reliable indication of the knowledge, skills and understanding of a person upon whom it is conferred;
  - (c) the need to maintain public confidence in the qualification.
- (9) The appropriate regulator –
- (a) must not specify any matter for the purposes of subsection (7) unless it has consulted such persons as it thinks appropriate;
  - (b) must publish matters so specified (including the date from which they are to have effect) in such manner as is prescribed.
- (10) The appropriate regulator is –
- (a) in relation to a qualifications body that confers qualifications in England, a person prescribed by a Minister of the Crown;
  - (b) in relation to a qualifications body that confers qualifications in Wales, a person prescribed by the Welsh Ministers;
  - (c) in relation to a qualifications body that confers qualifications in Scotland, a person prescribed by the Scottish Ministers.
- (11) For the purposes of subsection (10), a qualification is conferred in a part of Great Britain if there are, or may reasonably be expected to be, persons seeking to obtain the qualification who are or will be assessed for those purposes wholly or mainly in that part.

## **97 Interpretation**

- (1) This section applies for the purposes of section 96.

- 
- (2) A qualifications body is an authority or body which can confer a relevant qualification.
- (3) A relevant qualification is an authorisation, qualification, approval or certification of such description as may be prescribed –
- (a) in relation to conferments in England, by a Minister of the Crown;
  - (b) in relation to conferments in Wales, by the Welsh Ministers;
  - (c) in relation to conferments in Scotland, by the Scottish Ministers.
- (4) An authority or body is not a qualifications body in so far as –
- (a) it is the responsible body of a school to which section 85 applies,
  - (b) it is the governing body of an institution to which section 91 applies,
  - (c) it exercises functions under the Education Acts, or
  - (d) it exercises functions under the Education (Scotland) Act 1980.
- (5) A qualifications body does not include an authority or body of such description, or in such circumstances, as may be prescribed.
- (6) A reference to conferring a relevant qualification includes a reference –
- (a) to renewing or extending the conferment of a relevant qualification;
  - (b) to authenticating a relevant qualification conferred by another person.
- (7) A reference in section 96(8), (10) or (11) to a qualification is a reference to a relevant qualification.
- (8) Subsection (11) of section 96 applies for the purposes of subsection (3) of this section as it applies for the purposes of subsection (10) of that section.

#### CHAPTER 4

##### MISCELLANEOUS

#### 98 Reasonable adjustments

Schedule 13 (reasonable adjustments) has effect.

#### 99 Educational charities and endowments

Schedule 14 (educational charities and endowments) has effect.

#### PART 7

##### ASSOCIATIONS

##### *Preliminary*

#### 100 Application of this Part

- (1) This Part does not apply to the protected characteristic of marriage and civil partnership.
- (2) This Part does not apply to discrimination, harassment or victimisation –
- (a) that is prohibited by Part 3 (services and public functions), Part 4 (premises), Part 5 (work) or Part 6 (education), or



- (b) that would be so prohibited but for an express exception.

*Membership, etc.*

### 101 Members and associates

- (1) An association (A) must not discriminate against a person (B) –
  - (a) in the arrangements A makes for deciding who to admit to membership;
  - (b) as to the terms on which A is prepared to admit B to membership;
  - (c) by not accepting B's application for membership.
- (2) An association (A) must not discriminate against a member (B) –
  - (a) in the way A affords B access, or by not affording B access, to a benefit, facility or service;
  - (b) by depriving B of membership;
  - (c) by varying B's terms of membership;
  - (d) by subjecting B to any other detriment.
- (3) An association (A) must not discriminate against an associate (B) –
  - (a) in the way A affords B access, or by not affording B access, to a benefit, facility or service;
  - (b) by depriving B of B's rights as an associate;
  - (c) by varying B's rights as an associate;
  - (d) by subjecting B to any other detriment.
- (4) An association must not harass –
  - (a) a member;
  - (b) a person seeking to become a member;
  - (c) an associate.
- (5) An association (A) must not victimise a person (B) –
  - (a) in the arrangements A makes for deciding who to admit to membership;
  - (b) as to the terms on which A is prepared to admit B to membership;
  - (c) by not accepting B's application for membership.
- (6) An association (A) must not victimise a member (B) –
  - (a) in the way A affords B access, or by not affording B access, to a benefit, facility or service;
  - (b) by depriving B of membership;
  - (c) by varying B's terms of membership;
  - (d) by subjecting B to any other detriment.
- (7) An association (A) must not victimise an associate (B) –
  - (a) in the way A affords B access, or by not affording B access, to a benefit, facility or service;
  - (b) by depriving B of B's rights as an associate;
  - (c) by varying B's rights as an associate;
  - (d) by subjecting B to any other detriment.

**102 Guests**

- (1) An association (A) must not discriminate against a person (B) –
  - (a) in the arrangements A makes for deciding who to invite, or who to permit to be invited, as a guest;
  - (b) as to the terms on which A is prepared to invite B, or to permit B to be invited, as a guest;
  - (c) by not inviting B, or not permitting B to be invited, as a guest.
- (2) An association (A) must not discriminate against a guest (B) invited by A or with A's permission (whether express or implied) –
  - (a) in the way A affords B access, or by not affording B access, to a benefit, facility or service;
  - (b) by subjecting B to any other detriment.
- (3) An association must not harass –
  - (a) a guest;
  - (b) a person seeking to be a guest.
- (4) An association (A) must not victimise a person (B) –
  - (a) in the arrangements A makes for deciding who to invite, or who to permit to be invited, as a guest;
  - (b) as to the terms on which A is prepared to invite B, or to permit B to be invited, as a guest;
  - (c) by not inviting B, or not permitting B to be invited, as a guest.
- (5) An association (A) must not victimise a guest (B) invited by A or with A's permission (whether express or implied) –
  - (a) in the way A affords B access, or by not affording B access, to a benefit, facility or service;
  - (b) by subjecting B to any other detriment.

**103 Sections 101 and 102: further provision**

- (1) A duty to make reasonable adjustments applies to an association.
- (2) In the application of section 26 for the purposes of section 101(4) or 102(3), neither of the following is a relevant protected characteristic –
  - (a) religion or belief;
  - (b) sexual orientation.

*Special provision for political parties*

**104 Selection of candidates**

- (1) This section applies to an association which is a registered political party.
- (2) A person does not contravene this Part only by acting in accordance with selection arrangements.
- (3) Selection arrangements are arrangements –
  - (a) which the party makes for regulating the selection of its candidates in a relevant election,



- (b) the purpose of which is to reduce inequality in the party's representation in the body concerned, and
  - (c) which, subject to subsection (7), are a proportionate means of achieving that purpose.
- (4) The reference in subsection (3)(b) to inequality in a party's representation in a body is a reference to inequality between—
- (a) the number of the party's candidates elected to be members of the body who share a protected characteristic, and
  - (b) the number of the party's candidates so elected who do not share that characteristic.
- (5) For the purposes of subsection (4), persons share the protected characteristic of disability if they are disabled persons (and section 6(3)(b) is accordingly to be ignored).
- (6) Selection arrangements do not include short-listing only such persons as have a particular protected characteristic.
- (7) But subsection (6) does not apply to the protected characteristic of sex; and subsection (3)(c) does not apply to short-listing in reliance on this subsection.
- (8) The following elections are relevant elections—
- (a) Parliamentary Elections;
  - (b) elections to the European Parliament;
  - (c) elections to the Scottish Parliament;
  - (d) elections to the National Assembly for Wales;
  - (e) local government elections within the meaning of section 191, 203 or 204 of the Representation of the People Act 1983 (excluding elections for the Mayor of London).

### 105 Time-limited provision

- (1) Section 104(7) and the words “, subject to subsection (7),” in section 104(3)(c) are repealed at the end of 2030 unless an order is made under subsection (2).
- (2) At any time before the end of 2030, a Minister of the Crown may by order provide that subsection (1) is to have effect with the substitution of a later time for that for the time being specified there.
- (3) In section 3 of the Sex Discrimination (Election Candidates) Act 2002 (expiry of that Act), in subsection (1) for “2015” substitute “2030”.
- (4) The substitution made by subsection (3) does not affect the power to substitute a later time by order under section 3 of that Act.

### 106 Information about diversity in range of candidates, etc.

- (1) This section applies to an association which is a registered political party.
- (2) If the party had candidates at a relevant election, the party must, in accordance with regulations, publish information relating to protected characteristics of persons who come within a description prescribed in the regulations in accordance with subsection (3).
- (3) One or more of the following descriptions may be prescribed for the purposes of subsection (2)—

- 
- (a) successful applicants for nomination as a candidate at the relevant election;
    - (b) unsuccessful applicants for nomination as a candidate at that election;
    - (c) candidates elected at that election;
    - (d) candidates who are not elected at that election.
  - (4) The duty imposed by subsection (2) applies only in so far as it is possible to publish information in a manner that ensures that no person to whom the information relates can be identified from that information.
  - (5) The following elections are relevant elections—
    - (a) Parliamentary Elections;
    - (b) elections to the European Parliament;
    - (c) elections to the Scottish Parliament;
    - (d) elections to the National Assembly for Wales.
  - (6) This section does not apply to the following protected characteristics—
    - (a) marriage and civil partnership;
    - (b) pregnancy and maternity.
  - (7) The regulations may provide that the information to be published—
    - (a) must (subject to subsection (6)) relate to all protected characteristics or only to such as are prescribed;
    - (b) must include a statement, in respect of each protected characteristic to which the information relates, of the proportion that the number of persons who provided the information to the party bears to the number of persons who were asked to provide it.
  - (8) Regulations under this section may prescribe—
    - (a) descriptions of information;
    - (b) descriptions of political party to which the duty is to apply;
    - (c) the time at which information is to be published;
    - (d) the form and manner in which information is to be published;
    - (e) the period for which information is to be published.
  - (9) Provision by virtue of subsection (8)(b) may, in particular, provide that the duty imposed by subsection (2) does not apply to a party which had candidates in fewer constituencies in the election concerned than a prescribed number.
  - (10) Regulations under this section—
    - (a) may provide that the duty imposed by subsection (2) applies only to such relevant elections as are prescribed;
    - (b) may provide that a by-election or other election to fill a vacancy is not to be treated as a relevant election or is to be so treated only to a prescribed extent;
    - (c) may amend this section so as to provide for the duty imposed by subsection (2) to apply in the case of additional descriptions of election.
  - (11) Nothing in this section authorises a political party to require a person to provide information to it.

*Supplementary***107 Interpretation and exceptions**

- (1) This section applies for the purposes of this Part.
- (2) An “association” is an association of persons –
  - (a) which has at least 25 members, and
  - (b) admission to membership of which is regulated by the association’s rules and involves a process of selection.
- (3) A Minister of the Crown may by order amend subsection (2)(a) so as to substitute a different number for that for the time being specified there.
- (4) It does not matter –
  - (a) whether an association is incorporated;
  - (b) whether its activities are carried on for profit.
- (5) Membership is membership of any description; and a reference to a member is to be construed accordingly.
- (6) A person is an “associate”, in relation to an association, if the person –
  - (a) is not a member of the association, but
  - (b) in accordance with the association’s rules, has some or all of the rights as a member as a result of being a member of another association.
- (7) A reference to a registered political party is a reference to a party registered in the Great Britain register under Part 2 of the Political Parties, Elections and Referendums Act 2000.
- (8) Schedule 15 (reasonable adjustments) has effect.
- (9) Schedule 16 (exceptions) has effect.

**PART 8**

## PROHIBITED CONDUCT: ANCILLARY

**108 Relationships that have ended**

- (1) A person (A) must not discriminate against another (B) if –
  - (a) the discrimination arises out of and is closely connected to a relationship which used to exist between them, and
  - (b) conduct of a description constituting the discrimination would, if it occurred during the relationship, contravene this Act.
- (2) A person (A) must not harass another (B) if –
  - (a) the harassment arises out of and is closely connected to a relationship which used to exist between them, and
  - (b) conduct of a description constituting the harassment would, if it occurred during the relationship, contravene this Act.
- (3) It does not matter whether the relationship ends before or after the commencement of this section.
- (4) A duty to make reasonable adjustments applies to A in so far as B continues to be placed at a substantial disadvantage as mentioned in section 20.

- (5) For the purposes of subsection (4), sections 20, 21 and 22 and the applicable Schedules are to be construed as if the relationship had not ended.
- (6) For the purposes of Part 9 (enforcement), a contravention of this section relates to the Part of this Act that would have been contravened if the relationship had not ended.
- (7) But conduct is not a contravention of this section in so far as it also amounts to victimisation of B by A.

### **109 Liability of employers and principals**

- (1) Anything done by a person (A) in the course of A's employment must be treated as also done by the employer.
- (2) Anything done by an agent for a principal, with the authority of the principal, must be treated as also done by the principal.
- (3) It does not matter whether that thing is done with the employer's or principal's knowledge or approval.
- (4) In proceedings against A's employer (B) in respect of anything alleged to have been done by A in the course of A's employment it is a defence for B to show that B took all reasonable steps to prevent A –
  - (a) from doing that thing, or
  - (b) from doing anything of that description.
- (5) This section does not apply to offences under this Act (other than offences under Part 12 (disabled persons: transport)).

### **110 Liability of employees and agents**

- (1) A person (A) contravenes this section if –
  - (a) A is an employee or agent,
  - (b) A does something which, by virtue of section 109(1) or (2), is treated as having been done by A's employer or principal (as the case may be), and
  - (c) the doing of that thing by A amounts to a contravention of this Act by the employer or principal (as the case may be).
- (2) It does not matter whether, in any proceedings, the employer is found not to have contravened this Act by virtue of section 109(4).
- (3) A does not contravene this section if –
  - (a) A relies on a statement by the employer or principal that doing that thing is not a contravention of this Act, and
  - (b) it is reasonable for A to do so.
- (4) A person (B) commits an offence if B knowingly or recklessly makes a statement mentioned in subsection (3)(a) which is false or misleading in a material respect.
- (5) A person guilty of an offence under subsection (4) is liable on summary conviction to a fine not exceeding level 5 on the standard scale.
- (6) Part 9 (enforcement) applies to a contravention of this section by A as if it were the contravention mentioned in subsection (1)(c).

- (7) The reference in subsection (1)(c) to a contravention of this Act does not include a reference to disability discrimination in contravention of Chapter 1 of Part 6 (schools).

### 111 Instructing, causing or inducing contraventions

- (1) A person (A) must not instruct another (B) to do in relation to a third person (C) anything which contravenes Part 3, 4, 5, 6 or 7 or section 108(1) or (2) or 112(1) (a basic contravention).
- (2) A person (A) must not cause another (B) to do in relation to a third person (C) anything which is a basic contravention.
- (3) A person (A) must not induce another (B) to do in relation to a third person (C) anything which is a basic contravention.
- (4) For the purposes of subsection (3), inducement may be direct or indirect.
- (5) Proceedings for a contravention of this section may be brought—
- (a) by B, if B is subjected to a detriment as a result of A's conduct;
  - (b) by C, if C is subjected to a detriment as a result of A's conduct;
  - (c) by the Commission.
- (6) For the purposes of subsection (5), it does not matter whether—
- (a) the basic contravention occurs;
  - (b) any other proceedings are, or may be, brought in relation to A's conduct.
- (7) This section does not apply unless the relationship between A and B is such that A is in a position to commit a basic contravention in relation to B.
- (8) A reference in this section to causing or inducing a person to do something includes a reference to attempting to cause or induce the person to do it.
- (9) For the purposes of Part 9 (enforcement), a contravention of this section is to be treated as relating—
- (a) in a case within subsection (5)(a), to the Part of this Act which, because of the relationship between A and B, A is in a position to contravene in relation to B;
  - (b) in a case within subsection (5)(b), to the Part of this Act which, because of the relationship between B and C, B is in a position to contravene in relation to C.

### 112 Aiding contraventions

- (1) A person (A) must not knowingly help another (B) to do anything which contravenes Part 3, 4, 5, 6 or 7 or section 108(1) or (2) or 111 (a basic contravention).
- (2) It is not a contravention of subsection (1) if—
- (a) A relies on a statement by B that the act for which the help is given does not contravene this Act, and
  - (b) it is reasonable for A to do so.
- (3) B commits an offence if B knowingly or recklessly makes a statement mentioned in subsection (2)(a) which is false or misleading in a material respect.

- (4) A person guilty of an offence under subsection (3) is liable on summary conviction to a fine not exceeding level 5 on the standard scale.
- (5) For the purposes of Part 9 (enforcement), a contravention of this section is to be treated as relating to the provision of this Act to which the basic contravention relates.
- (6) The reference in subsection (1) to a basic contravention does not include a reference to disability discrimination in contravention of Chapter 1 of Part 6 (schools).

## PART 9

### ENFORCEMENT

#### CHAPTER 1

##### INTRODUCTORY

### 113 Proceedings

- (1) Proceedings relating to a contravention of this Act must be brought in accordance with this Part.
- (2) Subsection (1) does not apply to proceedings under Part 1 of the Equality Act 2006.
- (3) Subsection (1) does not prevent –
  - (a) a claim for judicial review;
  - (b) proceedings under the Immigration Acts;
  - (c) proceedings under the Special Immigration Appeals Commission Act 1997;
  - (d) in Scotland, an application to the supervisory jurisdiction of the Court of Session.
- (4) This section is subject to any express provision of this Act conferring jurisdiction on a court or tribunal.
- (5) The reference to a contravention of this Act includes a reference to a breach of an equality clause or rule.
- (6) Chapters 2 and 3 do not apply to proceedings relating to an equality clause or rule except in so far as Chapter 4 provides for that.
- (7) This section does not apply to –
  - (a) proceedings for an offence under this Act;
  - (b) proceedings relating to a penalty under Part 12 (disabled persons: transport).



## CHAPTER 2

### CIVIL COURTS

#### 114 Jurisdiction

- (1) A county court or, in Scotland, the sheriff has jurisdiction to determine a claim relating to –
  - (a) a contravention of Part 3 (services and public functions);
  - (b) a contravention of Part 4 (premises);
  - (c) a contravention of Part 6 (education);
  - (d) a contravention of Part 7 (associations);
  - (e) a contravention of section 108, 111 or 112 that relates to Part 3, 4, 6 or 7.
- (2) Subsection (1)(a) does not apply to a claim within section 115.
- (3) Subsection (1)(c) does not apply to a claim within section 116.
- (4) Subsection (1)(d) does not apply to a contravention of section 106.
- (5) For the purposes of proceedings on a claim within subsection (1)(a) –
  - (a) a decision in proceedings on a claim mentioned in section 115(1) that an act is a contravention of Part 3 is binding;
  - (b) it does not matter whether the act occurs outside the United Kingdom.
- (6) The county court or sheriff –
  - (a) must not grant an interim injunction or interdict unless satisfied that no criminal matter would be prejudiced by doing so;
  - (b) must grant an application to stay or sist proceedings under subsection (1) on grounds of prejudice to a criminal matter unless satisfied the matter will not be prejudiced.
- (7) In proceedings in England and Wales on a claim within subsection (1), the power under section 63(1) of the County Courts Act 1984 (appointment of assessors) must be exercised unless the judge is satisfied that there are good reasons for not doing so.
- (8) In proceedings in Scotland on a claim within subsection (1), the power under rule 44.3 of Schedule 1 to the Sheriff Court (Scotland) Act 1907 (appointment of assessors) must be exercised unless the sheriff is satisfied that there are good reasons for not doing so.
- (9) The remuneration of an assessor appointed by virtue of subsection (8) is to be at a rate determined by the Lord President of the Court of Session.

#### 115 Immigration cases

- (1) A claim is within this section if it relates to the act of an immigration authority in taking a relevant decision and –
  - (a) the question whether the act is a contravention of Part 3 has been or could be raised on an appeal which is pending, or could be brought, under the immigration provisions, or
  - (b) it has been decided on an appeal under those provisions that the act is not a contravention of Part 3.
- (2) The relevant decision is not –

- (a) subject to challenge in proceedings on a claim within section 114(1)(a), or
  - (b) affected by the decision of a court in such proceedings.
- (3) For the purposes of subsection (1)(a) a power to grant permission to appeal out of time must be ignored.
- (4) Each of the following is an immigration authority –
- (a) the Secretary of State;
  - (b) an immigration officer;
  - (c) a person responsible for the grant or refusal of entry clearance (within the meaning of section 33(1) of the Immigration Act 1971).
- (5) The immigration provisions are –
- (a) the Special Immigration Appeals Commission Act 1997, or
  - (b) Part 5 of the Nationality, Immigration and Asylum Act 2002.
- (6) A relevant decision is –
- (a) a decision under the Immigration Acts relating to the entitlement of a person to enter or remain in the United Kingdom;
  - (b) a decision on an appeal under the immigration provisions relating to a decision within paragraph (a).
- (7) An appeal is pending if it is pending for the purposes of section 104 of the Nationality, Immigration and Asylum Act 2002 or (as the case may be) for the purposes of that section as it is applied by section 2(2)(j) of the Special Immigration Appeals Commission Act 1997.

#### **116 Education cases**

- (1) A claim is within this section if it may be made to –
- (a) the First-tier Tribunal in accordance with Part 2 of Schedule 17,
  - (b) the Special Educational Needs Tribunal for Wales in accordance with Part 2 of that Schedule, or
  - (c) an Additional Support Needs Tribunal for Scotland in accordance with Part 3 of that Schedule.
- (2) A claim is also within this section if it must be made in accordance with appeal arrangements within the meaning of Part 4 of that Schedule.
- (3) Schedule 17 (disabled pupils: enforcement) has effect.

#### **117 National security**

- (1) Rules of court may, in relation to proceedings on a claim within section 114, confer power as mentioned in subsections (2) to (4); but a power so conferred is exercisable only if the court thinks it expedient to do so in the interests of national security.
- (2) The rules may confer power to exclude from all or part of the proceedings –
- (a) the claimant or pursuer;
  - (b) a representative of the claimant or pursuer;
  - (c) an assessor.



- (3) The rules may confer power to permit a claimant, pursuer or representative who has been excluded to make a statement to the court before the commencement of the proceedings, or part of the proceedings, to which the exclusion relates.
- (4) The rules may confer power to take steps to keep secret all or part of the reasons for the court's decision.
- (5) The Attorney General or, in Scotland, the Advocate General for Scotland may appoint a person to represent the interests of a claimant or pursuer in, or in any part of, proceedings to which an exclusion by virtue of subsection (2)(a) or (b) relates.
- (6) A person (P) may be appointed under subsection (5) only if—
  - (a) in relation to proceedings in England and Wales, P is a person who, for the purposes of the Legal Services Act 2007, is an authorised person in relation to an activity which constitutes the exercise of a right of audience or the conduct of litigation;
  - (b) in relation to proceedings in Scotland, P is an advocate or qualified to practice as a solicitor in Scotland.
- (7) P is not responsible to the person whose interests P is appointed to represent.

#### 118 Time limits

- (1) Proceedings on a claim within section 114 may not be brought after the end of—
  - (a) the period of 6 months starting with the date of the act to which the claim relates, or
  - (b) such other period as the county court or sheriff thinks just and equitable.
- (2) If subsection (3) or (4) applies, subsection (1)(a) has effect as if for “6 months” there were substituted “9 months”.
- (3) This subsection applies if—
  - (a) the claim relates to the act of a qualifying institution, and
  - (b) a complaint relating to the act is referred under the student complaints scheme before the end of the period of 6 months starting with the date of the act.
- (4) This subsection applies if—
  - (a) the claim relates to a dispute referred for conciliation in pursuance of arrangements under section 27 of the Equality Act 2006, and
  - (b) subsection (3) does not apply.
- (5) If it has been decided under the immigration provisions that the act of an immigration authority in taking a relevant decision is a contravention of Part 3 (services and public functions), subsection (1) has effect as if for paragraph (a) there were substituted—
  - “(a) the period of 6 months starting with the day after the expiry of the period during which, as a result of section 114(2), proceedings could not be brought in reliance on section 114(1)(a);”.
- (6) For the purposes of this section—

- 
- (a) conduct extending over a period is to be treated as done at the end of the period;
  - (b) failure to do something is to be treated as occurring when the person in question decided on it.
- (7) In the absence of evidence to the contrary, a person (P) is to be taken to decide on failure to do something –
- (a) when P does an act inconsistent with doing it, or
  - (b) if P does no inconsistent act, on the expiry of the period in which P might reasonably have been expected to do it.
- (8) In this section –
- “immigration authority”, “immigration provisions” and “relevant decision” each have the meaning given in section 115;
  - “qualifying institution” has the meaning given in section 11 of the Higher Education Act 2004;
  - “the student complaints scheme” means a scheme for the review of qualifying complaints (within the meaning of section 12 of that Act) that is provided by the designated operator (within the meaning of section 13(5)(b) of that Act).

## **119 Remedies**

- (1) This section applies if a county court or the sheriff finds that there has been a contravention of a provision referred to in section 114(1).
- (2) The county court has power to grant any remedy which could be granted by the High Court –
  - (a) in proceedings in tort;
  - (b) on a claim for judicial review.
- (3) The sheriff has power to make any order which could be made by the Court of Session –
  - (a) in proceedings for reparation;
  - (b) on a petition for judicial review.
- (4) An award of damages may include compensation for injured feelings (whether or not it includes compensation on any other basis).
- (5) Subsection (6) applies if the county court or sheriff –
  - (a) finds that a contravention of a provision referred to in section 114(1) is established by virtue of section 19, but
  - (b) is satisfied that the provision, criterion or practice was not applied with the intention of discriminating against the claimant or pursuer.
- (6) The county court or sheriff must not make an award of damages unless it first considers whether to make any other disposal.
- (7) The county court or sheriff must not grant a remedy other than an award of damages or the making of a declaration unless satisfied that no criminal matter would be prejudiced by doing so.

### CHAPTER 3

#### EMPLOYMENT TRIBUNALS

#### 120 Jurisdiction

- (1) An employment tribunal has, subject to section 121, jurisdiction to determine a complaint relating to—
  - (a) a contravention of Part 5 (work);
  - (b) a contravention of section 108, 111 or 112 that relates to Part 5.
- (2) An employment tribunal has jurisdiction to determine an application by a responsible person (as defined by section 61) for a declaration as to the rights of that person and a worker in relation to a dispute about the effect of a non-discrimination rule.
- (3) An employment tribunal also has jurisdiction to determine an application by the trustees or managers of an occupational pension scheme for a declaration as to their rights and those of a member in relation to a dispute about the effect of a non-discrimination rule.
- (4) An employment tribunal also has jurisdiction to determine a question that—
  - (a) relates to a non-discrimination rule, and
  - (b) is referred to the tribunal by virtue of section 122.
- (5) In proceedings before an employment tribunal on a complaint relating to a breach of a non-discrimination rule, the employer—
  - (a) is to be treated as a party, and
  - (b) is accordingly entitled to appear and be heard.
- (6) Nothing in this section affects such jurisdiction as the High Court, a county court, the Court of Session or the sheriff has in relation to a non-discrimination rule.
- (7) Subsection (1)(a) does not apply to a contravention of section 53 in so far as the act complained of may, by virtue of an enactment, be subject to an appeal or proceedings in the nature of an appeal.
- (8) In subsection (1), the references to Part 5 do not include a reference to section 60(1).

#### 121 Armed forces cases

- (1) Section 120(1) does not apply to a complaint relating to an act done when the complainant was serving as a member of the armed forces unless—
  - (a) the complainant has made a service complaint about the matter, and
  - (b) the complaint has not been withdrawn.
- (2) If the complaint is made under the service complaint procedures, it is to be treated for the purposes of subsection (1)(b) as withdrawn if—
  - (a) neither the officer to whom it is made nor a superior officer refers it to the Defence Council, and
  - (b) the complainant does not apply for it to be referred to the Defence Council.

- (3) If the complaint is made under the old service redress procedures, it is to be treated for the purposes of subsection (1)(b) as withdrawn if the complainant does not submit it to the Defence Council under those procedures.
- (4) The reference in subsection (3) to the old service redress procedures is a reference to the procedures (other than those relating to the making of a report on a complaint to Her Majesty) referred to in –
  - (a) section 180 of the Army Act 1955,
  - (b) section 180 of the Air Force Act 1955, or
  - (c) section 130 of the Naval Discipline Act 1957.
- (5) The making of a complaint to an employment tribunal in reliance on subsection (1) does not affect the continuation of the service complaint procedures or (as the case may be) the old service redress procedures.

### **122 References by court to tribunal, etc.**

- (1) If it appears to a court in which proceedings are pending that a claim or counter-claim relating to a non-discrimination rule could more conveniently be determined by an employment tribunal, the court may strike out the claim or counter-claim.
- (2) If in proceedings before a court a question arises about a non-discrimination rule, the court may (whether or not on an application by a party to the proceedings) –
  - (a) refer the question, or direct that it be referred by a party to the proceedings, to an employment tribunal for determination, and
  - (b) stay or sist the proceedings in the meantime.

### **123 Time limits**

- (1) Proceedings on a complaint within section 120 may not be brought after the end of –
  - (a) the period of 3 months starting with the date of the act to which the complaint relates, or
  - (b) such other period as the employment tribunal thinks just and equitable.
- (2) Proceedings may not be brought in reliance on section 121(1) after the end of –
  - (a) the period of 6 months starting with the date of the act to which the proceedings relate, or
  - (b) such other period as the employment tribunal thinks just and equitable.
- (3) For the purposes of this section –
  - (a) conduct extending over a period is to be treated as done at the end of the period;
  - (b) failure to do something is to be treated as occurring when the person in question decided on it.
- (4) In the absence of evidence to the contrary, a person (P) is to be taken to decide on failure to do something –
  - (a) when P does an act inconsistent with doing it, or
  - (b) if P does no inconsistent act, on the expiry of the period in which P might reasonably have been expected to do it.

**124 Remedies: general**

- (1) This section applies if an employment tribunal finds that there has been a contravention of a provision referred to in section 120(1).
- (2) The tribunal may –
  - (a) make a declaration as to the rights of the complainant and the respondent in relation to the matters to which the proceedings relate;
  - (b) order the respondent to pay compensation to the complainant;
  - (c) make an appropriate recommendation.
- (3) An appropriate recommendation is a recommendation that within a specified period the respondent takes specified steps for the purpose of obviating or reducing the adverse effect of any matter to which the proceedings relate –
  - (a) on the complainant;
  - (b) on any other person.
- (4) Subsection (5) applies if the tribunal –
  - (a) finds that a contravention is established by virtue of section 19, but
  - (b) is satisfied that the provision, criterion or practice was not applied with the intention of discriminating against the complainant.
- (5) It must not make an order under subsection (2)(b) unless it first considers whether to act under subsection (2)(a) or (c).
- (6) The amount of compensation which may be awarded under subsection (2)(b) corresponds to the amount which could be awarded by a county court or the sheriff under section 119.
- (7) If a respondent fails, without reasonable excuse, to comply with an appropriate recommendation in so far as it relates to the complainant, the tribunal may –
  - (a) if an order was made under subsection (2)(b), increase the amount of compensation to be paid;
  - (b) if no such order was made, make one.

**125 Remedies: national security**

- (1) In national security proceedings, an appropriate recommendation (as defined by section 124) must not be made in relation to a person other than the complainant if the recommendation would affect anything done by –
  - (a) the Security Service,
  - (b) the Secret Intelligence Service,
  - (c) the Government Communications Headquarters, or
  - (d) a part of the armed forces which is, in accordance with a requirement of the Secretary of State, assisting the Government Communications Headquarters.
- (2) National security proceedings are –
  - (a) proceedings to which a direction under section 10(3) of the Employment Tribunals Act 1996 (national security) relates;
  - (b) proceedings to which an order under section 10(4) of that Act relates;
  - (c) proceedings (or the part of proceedings) to which a direction pursuant to regulations made under section 10(5) of that Act relates;

- (d) proceedings (or the part of proceedings) in relation to which an employment tribunal acts pursuant to regulations made under section 10(6) of that Act.

### **126 Remedies: occupational pension schemes**

- (1) This section applies if an employment tribunal finds that there has been a contravention of a provision referred to in section 120(1) in relation to—
  - (a) the terms on which persons become members of an occupational pension scheme, or
  - (b) the terms on which members of an occupational pension scheme are treated.
- (2) In addition to anything which may be done by the tribunal under section 124 the tribunal may also by order declare—
  - (a) if the complaint relates to the terms on which persons become members of a scheme, that the complainant has a right to be admitted to the scheme;
  - (b) if the complaint relates to the terms on which members of the scheme are treated, that the complainant has a right to membership of the scheme without discrimination.
- (3) The tribunal may not make an order under subsection (2)(b) of section 124 unless—
  - (a) the compensation is for injured feelings, or
  - (b) the order is made by virtue of subsection (7) of that section.
- (4) An order under subsection (2)—
  - (a) may make provision as to the terms on which or the capacity in which the claimant is to enjoy the admission or membership;
  - (b) may have effect in relation to a period before the order is made.

## **CHAPTER 4**

### **EQUALITY OF TERMS**

#### **127 Jurisdiction**

- (1) An employment tribunal has, subject to subsection (6), jurisdiction to determine a complaint relating to a breach of an equality clause or rule.
- (2) The jurisdiction conferred by subsection (1) includes jurisdiction to determine a complaint arising out of a breach of an equality clause or rule; and a reference in this Chapter to a complaint relating to such a breach is to be read accordingly.
- (3) An employment tribunal also has jurisdiction to determine an application by a responsible person for a declaration as to the rights of that person and a worker in relation to a dispute about the effect of an equality clause or rule.
- (4) An employment tribunal also has jurisdiction to determine an application by the trustees or managers of an occupational pension scheme for a declaration as to their rights and those of a member in relation to a dispute about the effect of an equality rule.



- (5) An employment tribunal also has jurisdiction to determine a question that –
  - (a) relates to an equality clause or rule, and
  - (b) is referred to the tribunal by virtue of section 128(2).
- (6) This section does not apply to a complaint relating to an act done when the complainant was serving as a member of the armed forces unless –
  - (a) the complainant has made a service complaint about the matter, and
  - (b) the complaint has not been withdrawn.
- (7) Subsections (2) to (5) of section 121 apply for the purposes of subsection (6) of this section as they apply for the purposes of subsection (1) of that section.
- (8) In proceedings before an employment tribunal on a complaint relating to a breach of an equality rule, the employer –
  - (a) is to be treated as a party, and
  - (b) is accordingly entitled to appear and be heard.
- (9) Nothing in this section affects such jurisdiction as the High Court, a county court, the Court of Session or the sheriff has in relation to an equality clause or rule.

#### **128 References by court to tribunal, etc.**

- (1) If it appears to a court in which proceedings are pending that a claim or counter-claim relating to an equality clause or rule could more conveniently be determined by an employment tribunal, the court may strike out the claim or counter-claim.
- (2) If in proceedings before a court a question arises about an equality clause or rule, the court may (whether or not on an application by a party to the proceedings) –
  - (a) refer the question, or direct that it be referred by a party to the proceedings, to an employment tribunal for determination, and
  - (b) stay or sist the proceedings in the meantime.

#### **129 Time limits**

- (1) This section applies to –
  - (a) a complaint relating to a breach of an equality clause or rule;
  - (b) an application for a declaration referred to in section 127(3) or (4).
- (2) Proceedings on the complaint or application may not be brought in an employment tribunal after the end of the qualifying period.
- (3) If the complaint or application relates to terms of work other than terms of service in the armed forces, the qualifying period is, in a case mentioned in the first column of the table, the period mentioned in the second column.

<i>Case</i>	<i>Qualifying period</i>
A standard case	The period of 6 months beginning with the last day of the employment or appointment.

<i>Case</i>	<i>Qualifying period</i>
A stable work case (but not if it is also a concealment or incapacity case (or both))	The period of 6 months beginning with the day on which the stable working relationship ended.
A concealment case (but not if it is also an incapacity case)	The period of 6 months beginning with the day on which the worker discovered (or could with reasonable diligence have discovered) the qualifying fact.
An incapacity case (but not if it is also a concealment case)	The period of 6 months beginning with the day on which the worker ceased to have the incapacity.
A case which is a concealment case and an incapacity case.	The period of 6 months beginning with the later of the days on which the period would begin if the case were merely a concealment or incapacity case.

- (4) If the complaint or application relates to terms of service in the armed forces, the qualifying period is, in a case mentioned in the first column of the table, the period mentioned in the second column.

<i>Case</i>	<i>Qualifying period</i>
A standard case	The period of 9 months beginning with the last day of the period of service during which the complaint arose.
A concealment case (but not if it is also an incapacity case)	The period of 9 months beginning with the day on which the worker discovered (or could with reasonable diligence have discovered) the qualifying fact.
An incapacity case (but not if it is also a concealment case)	The period of 9 months beginning with the day on which the worker ceased to have the incapacity.
A case which is a concealment case and an incapacity case.	The period of 9 months beginning with the later of the days on which the period would begin if the case were merely a concealment or incapacity case.

### 130 Section 129: supplementary

- (1) This section applies for the purposes of section 129.
- (2) A standard case is a case which is not –
- (a) a stable work case,
  - (b) a concealment case,
  - (c) an incapacity case, or
  - (d) a concealment case and an incapacity case.



- (3) A stable work case is a case where the proceedings relate to a period during which there was a stable working relationship between the worker and the responsible person (including any time after the terms of work had expired).
- (4) A concealment case in proceedings relating to an equality clause is a case where—
  - (a) the responsible person deliberately concealed a qualifying fact from the worker, and
  - (b) the worker did not discover (or could not with reasonable diligence have discovered) the qualifying fact until after the relevant day.
- (5) A concealment case in proceedings relating to an equality rule is a case where—
  - (a) the employer or the trustees or managers of the occupational pension scheme in question deliberately concealed a qualifying fact from the member, and
  - (b) the member did not discover (or could not with reasonable diligence have discovered) the qualifying fact until after the relevant day.
- (6) A qualifying fact for the purposes of subsection (4) or (5) is a fact—
  - (a) which is relevant to the complaint, and
  - (b) without knowledge of which the worker or member could not reasonably have been expected to bring the proceedings.
- (7) An incapacity case in proceedings relating to an equality clause with respect to terms of work other than terms of service in the armed forces is a case where the worker had an incapacity during the period of 6 months beginning with the later of—
  - (a) the relevant day, or
  - (b) the day on which the worker discovered (or could with reasonable diligence have discovered) the qualifying fact deliberately concealed from the worker by the responsible person.
- (8) An incapacity case in proceedings relating to an equality clause with respect to terms of service in the armed forces is a case where the worker had an incapacity during the period of 9 months beginning with the later of—
  - (a) the last day of the period of service during which the complaint arose, or
  - (b) the day on which the worker discovered (or could with reasonable diligence have discovered) the qualifying fact deliberately concealed from the worker by the responsible person.
- (9) An incapacity case in proceedings relating to an equality rule is a case where the member of the occupational pension scheme in question had an incapacity during the period of 6 months beginning with the later of—
  - (a) the relevant day, or
  - (b) the day on which the member discovered (or could with reasonable diligence have discovered) the qualifying fact deliberately concealed from the member by the employer or the trustees or managers of the scheme.
- (10) The relevant day for the purposes of this section is—
  - (a) the last day of the employment or appointment, or
  - (b) the day on which the stable working relationship between the worker and the responsible person ended.

**131 Assessment of whether work is of equal value**

- (1) This section applies to proceedings before an employment tribunal on—
  - (a) a complaint relating to a breach of an equality clause or rule, or
  - (b) a question referred to the tribunal by virtue of section 128(2).
- (2) Where a question arises in the proceedings as to whether one person's work is of equal value to another's, the tribunal may, before determining the question, require a member of the panel of independent experts to prepare a report on the question.
- (3) The tribunal may withdraw a requirement that it makes under subsection (2); and, if it does so, it may—
  - (a) request the panel member to provide it with specified documentation;
  - (b) make such other requests to that member as are connected with the withdrawal of the requirement.
- (4) If the tribunal requires the preparation of a report under subsection (2) (and does not withdraw the requirement), it must not determine the question unless it has received the report.
- (5) Subsection (6) applies where—
  - (a) a question arises in the proceedings as to whether the work of one person (A) is of equal value to the work of another (B), and
  - (b) A's work and B's work have been given different values by a job evaluation study.
- (6) The tribunal must determine that A's work is not of equal value to B's work unless it has reasonable grounds for suspecting that the evaluation contained in the study—
  - (a) was based on a system that discriminates because of sex, or
  - (b) is otherwise unreliable.
- (7) For the purposes of subsection (6)(a), a system discriminates because of sex if a difference (or coincidence) between values that the system sets on different demands is not justifiable regardless of the sex of the person on whom the demands are made.
- (8) A reference to a member of the panel of independent experts is a reference to a person—
  - (a) who is for the time being designated as such by the Advisory, Conciliation and Arbitration Service (ACAS) for the purposes of this section, and
  - (b) who is neither a member of the Council of ACAS nor one of its officers or members of staff.
- (9) "Job evaluation study" has the meaning given in section 80(5).

**132 Remedies in non-pensions cases**

- (1) This section applies to proceedings before a court or employment tribunal on a complaint relating to a breach of an equality clause, other than a breach with respect to membership of or rights under an occupational pension scheme.
- (2) If the court or tribunal finds that there has been a breach of the equality clause, it may—

- (a) make a declaration as to the rights of the parties in relation to the matters to which the proceedings relate;
  - (b) order an award by way of arrears of pay or damages in relation to the complainant.
- (3) The court or tribunal may not order a payment under subsection (2)(b) in respect of a time before the arrears day.
- (4) In relation to proceedings in England and Wales, the arrears day is, in a case mentioned in the first column of the table, the day mentioned in the second column.

<i>Case</i>	<i>Arrears day</i>
A standard case	The day falling 6 years before the day on which the proceedings were instituted.
A concealment case or an incapacity case (or a case which is both).	The day on which the breach first occurred.

- (5) In relation to proceedings in Scotland, the arrears day is the first day of—
- (a) the period of 5 years ending with the day on which the proceedings were commenced, or
  - (b) if the case involves a relevant incapacity, or a relevant fraud or error, the period of 20 years ending with that day.

### 133 Remedies in pensions cases

- (1) This section applies to proceedings before a court or employment tribunal on a complaint relating to—
- (a) a breach of an equality rule, or
  - (b) a breach of an equality clause with respect to membership of, or rights under, an occupational pension scheme.
- (2) If the court or tribunal finds that there has been a breach as referred to in subsection (1)—
- (a) it may make a declaration as to the rights of the parties in relation to the matters to which the proceedings relate;
  - (b) it must not order arrears of benefits or damages or any other amount to be paid to the complainant.
- (3) Subsection (2)(b) does not apply if the proceedings are proceedings to which section 134 applies.
- (4) If the breach relates to a term on which persons become members of the scheme, the court or tribunal may declare that the complainant is entitled to be admitted to the scheme with effect from a specified date.
- (5) A date specified for the purposes of subsection (4) must not be before 8 April 1976.
- (6) If the breach relates to a term on which members of the scheme are treated, the court or tribunal may declare that the complainant is, in respect of a specified

period, entitled to secure the rights that would have accrued if the breach had not occurred.

- (7) A period specified for the purposes of subsection (6) must not begin before 17 May 1990.
- (8) If the court or tribunal makes a declaration under subsection (6), the employer must provide such resources to the scheme as are necessary to secure for the complainant (without contribution or further contribution by the complainant or other members) the rights referred to in that subsection.

### **134 Remedies in claims for arrears brought by pensioner members**

- (1) This section applies to proceedings before a court or employment tribunal on a complaint by a pensioner member of an occupational pension scheme relating to a breach of an equality clause or rule with respect to a term on which the member is treated.
- (2) If the court or tribunal finds that there has been a breach referred to in subsection (1), it may –
  - (a) make a declaration as to the rights of the complainant and the respondent in relation to the matters to which the proceedings relate;
  - (b) order an award by way of arrears of benefits or damages or of any other amount in relation to the complainant.
- (3) The court or tribunal must not order an award under subsection (2)(b) in respect of a time before the arrears day.
- (4) If the court or tribunal orders an award under subsection (2)(b), the employer must provide such resources to the scheme as are necessary to secure for the complainant (without contribution or further contribution by the complainant or other members) the amount of the award.
- (5) In relation to proceedings in England and Wales, the arrears day is, in a case mentioned in the first column of the table, the day mentioned in the second column.

<i>Case</i>	<i>Arrears day</i>
A standard case	The day falling 6 years before the day on which the proceedings were commenced.
A concealment case or an incapacity case (or a case which is both).	The day on which the breach first occurred.

- (6) In relation to proceedings in Scotland, the arrears day is the first day of –
  - (a) the period of 5 years ending with the day on which the proceedings were commenced, or
  - (b) if the case involves a relevant incapacity, or a relevant fraud or error, the period of 20 years ending with that day.

### **135 Supplementary**

- (1) This section applies for the purposes of sections 132 to 134.

- (2) A standard case is a case which is not –
  - (a) a concealment case,
  - (b) an incapacity case, or
  - (c) a concealment case and an incapacity case.
- (3) A concealment case in relation to an equality clause is a case where –
  - (a) the responsible person deliberately concealed a qualifying fact (as defined by section 130) from the worker, and
  - (b) the worker commenced the proceedings before the end of the period of 6 years beginning with the day on which the worker discovered (or could with reasonable diligence have discovered) the qualifying fact.
- (4) A concealment case in relation to an equality rule is a case where –
  - (a) the employer or the trustees or managers of the occupational pension scheme in question deliberately concealed a qualifying fact (as defined by section 130) from the member, and
  - (b) the member commenced the proceedings before the end of the period of 6 years beginning with the day on which the member discovered (or could with reasonable diligence have discovered) the qualifying fact.
- (5) An incapacity case is a case where the worker or member –
  - (a) had an incapacity when the breach first occurred, and
  - (b) commenced the proceedings before the end of the period of 6 years beginning with the day on which the worker or member ceased to have the incapacity.
- (6) A case involves a relevant incapacity or a relevant fraud or error if the period of 5 years referred to in section 132(5)(a) is, as a result of subsection (7) below, reckoned as a period of more than 20 years.
- (7) For the purposes of the reckoning referred to in subsection (6), no account is to be taken of time when the worker or member –
  - (a) had an incapacity, or
  - (b) was induced by a relevant fraud or error to refrain from commencing proceedings (not being a time after the worker or member could with reasonable diligence have discovered the fraud or error).
- (8) For the purposes of subsection (7) –
  - (a) a fraud is relevant in relation to an equality clause if it is a fraud on the part of the responsible person;
  - (b) an error is relevant in relation to an equality clause if it is induced by the words or conduct of the responsible person;
  - (c) a fraud is relevant in relation to an equality rule if it is a fraud on the part of the employer or the trustees or managers of the scheme;
  - (d) an error is relevant in relation to an equality rule if it is induced by the words or conduct of the employer or the trustees or managers of the scheme.
- (9) A reference in subsection (8) to the responsible person, the employer or the trustees or managers includes a reference to a person acting on behalf of the person or persons concerned.
- (10) In relation to terms of service, a reference in section 132(5) or subsection (3) or (5)(b) of this section to commencing proceedings is to be read as a reference to making a service complaint.

- (11) A reference to a pensioner member of a scheme includes a reference to a person who is entitled to the present payment of pension or other benefits derived through a member.
- (12) In relation to proceedings before a court—
- (a) a reference to a complaint is to be read as a reference to a claim, and
  - (b) a reference to a complainant is to be read as a reference to a claimant.

## CHAPTER 5

### MISCELLANEOUS

#### **136 Burden of proof**

- (1) This section applies to any proceedings relating to a contravention of this Act.
- (2) If there are facts from which the court could decide, in the absence of any other explanation, that a person (A) contravened the provision concerned, the court must hold that the contravention occurred.
- (3) But subsection (2) does not apply if A shows that A did not contravene the provision.
- (4) The reference to a contravention of this Act includes a reference to a breach of an equality clause or rule.
- (5) This section does not apply to proceedings for an offence under this Act.
- (6) A reference to the court includes a reference to—
  - (a) an employment tribunal;
  - (b) the Asylum and Immigration Tribunal;
  - (c) the Special Immigration Appeals Commission;
  - (d) the First-tier Tribunal;
  - (e) the Special Educational Needs Tribunal for Wales;
  - (f) an Additional Support Needs Tribunal for Scotland.

#### **137 Previous findings**

- (1) A finding in relevant proceedings in respect of an act which has become final is to be treated as conclusive in proceedings under this Act.
- (2) Relevant proceedings are proceedings before a court or employment tribunal under any of the following—
  - (a) section 19 or 20 of the Race Relations Act 1968;
  - (b) the Equal Pay Act 1970;
  - (c) the Sex Discrimination Act 1975;
  - (d) the Race Relations Act 1976;
  - (e) section 6(4A) of the Sex Discrimination Act 1986;
  - (f) the Disability Discrimination Act 1995;
  - (g) Part 2 of the Equality Act 2006;
  - (h) the Employment Equality (Religion and Belief) Regulations 2003 (S.I. 2003/1660);
  - (i) the Employment Equality (Sexual Orientation) Regulations 2003 (S.I. 2003/1661);



- (j) the Employment Equality (Age) Regulations 2006 (S.I. 2006/1031);
  - (k) the Equality Act (Sexual Orientation) Regulations 2007 (S.I. 2007/1263).
- (3) A finding becomes final –
- (a) when an appeal against the finding is dismissed, withdrawn or abandoned, or
  - (b) when the time for appealing expires without an appeal having been brought.

### 138 Obtaining information, etc.

- (1) In this section –
- (a) P is a person who thinks that a contravention of this Act has occurred in relation to P;
  - (b) R is a person who P thinks has contravened this Act.
- (2) A Minister of the Crown must by order prescribe –
- (a) forms by which P may question R on any matter which is or may be relevant;
  - (b) forms by which R may answer questions by P.
- (3) A question by P or an answer by R is admissible as evidence in proceedings under this Act (whether or not the question or answer is contained in a prescribed form).
- (4) A court or tribunal may draw an inference from –
- (a) a failure by R to answer a question by P before the end of the period of 8 weeks beginning with the day on which the question is served;
  - (b) an evasive or equivocal answer.
- (5) Subsection (4) does not apply if –
- (a) R reasonably asserts that to have answered differently or at all might have prejudiced a criminal matter;
  - (b) R reasonably asserts that to have answered differently or at all would have revealed the reason for not commencing or not continuing criminal proceedings;
  - (c) R's answer is of a kind specified for the purposes of this paragraph by order of a Minister of the Crown;
  - (d) R's answer is given in circumstances specified for the purposes of this paragraph by order of a Minister of the Crown;
  - (e) R's failure to answer occurs in circumstances specified for the purposes of this paragraph by order of a Minister of the Crown.
- (6) The reference to a contravention of this Act includes a reference to a breach of an equality clause or rule.
- (7) A Minister of the Crown may by order –
- (a) prescribe the period within which a question must be served to be admissible under subsection (3);
  - (b) prescribe the manner in which a question by P, or an answer by R, may be served.
- (8) This section –

- (a) does not affect any other enactment or rule of law relating to interim or preliminary matters in proceedings before a county court, the sheriff or an employment tribunal, and
- (b) has effect subject to any enactment or rule of law regulating the admissibility of evidence in such proceedings.

**139 Interest**

- (1) Regulations may make provision –
  - (a) for enabling an employment tribunal to include interest on an amount awarded by it in proceedings under this Act;
  - (b) specifying the manner in which, and the periods and rate by reference to which, the interest is to be determined.
- (2) Regulations may modify the operation of an order made under section 14 of the Employment Tribunals Act 1996 (power to make provision as to interest on awards) in so far as it relates to an award in proceedings under this Act.

**140 Conduct giving rise to separate proceedings**

- (1) This section applies in relation to conduct which has given rise to two or more separate proceedings under this Act, with at least one being for a contravention of section 111 (instructing, causing or inducing contraventions).
- (2) A court may transfer proceedings to an employment tribunal.
- (3) An employment tribunal may transfer proceedings to a court.
- (4) A court or employment tribunal is to be taken for the purposes of this Part to have jurisdiction to determine a claim or complaint transferred to it under this section; accordingly –
  - (a) a reference to a claim within section 114(1) includes a reference to a claim transferred to a court under this section, and
  - (b) a reference to a complaint within section 120(1) includes a reference to a complaint transferred to an employment tribunal under this section.
- (5) A court or employment tribunal may not make a decision that is inconsistent with an earlier decision in proceedings arising out of the conduct.
- (6) “Court” means –
  - (a) in relation to proceedings in England and Wales, a county court;
  - (b) in relation to proceedings in Scotland, the sheriff.

**141 Interpretation, etc.**

- (1) This section applies for the purposes of this Part.
- (2) A reference to the responsible person, in relation to an equality clause or rule, is to be construed in accordance with Chapter 3 of Part 5.
- (3) A reference to a worker is a reference to the person to the terms of whose work the proceedings in question relate; and, for the purposes of proceedings relating to an equality rule or a non-discrimination rule, a reference to a worker includes a reference to a member of the occupational pension scheme in question.



- (4) A reference to the terms of a person’s work is to be construed in accordance with Chapter 3 of Part 5.
- (5) A reference to a member of an occupational pension scheme includes a reference to a prospective member.
- (6) In relation to proceedings in England and Wales, a person has an incapacity if the person –
  - (a) has not attained the age of 18, or
  - (b) lacks capacity (within the meaning of the Mental Capacity Act 2005).
- (7) In relation to proceedings in Scotland, a person has an incapacity if the person –
  - (a) has not attained the age of 16, or
  - (b) is incapable (within the meaning of the Adults with Incapacity (Scotland) Act 2000 (asp 4)).
- (8) “Service complaint” means a complaint under section 334 of the Armed Forces Act 2006; and “service complaint procedures” means the procedures prescribed by regulations under that section (except in so far as relating to references under section 337 of that Act).
- (9) “Criminal matter” means –
  - (a) an investigation into the commission of an alleged offence;
  - (b) a decision whether to commence criminal proceedings;
  - (c) criminal proceedings.

## PART 10

### CONTRACTS, ETC.

#### *Contracts and other agreements*

#### **142 Unenforceable terms**

- (1) A term of a contract is unenforceable against a person in so far as it constitutes, promotes or provides for treatment of that or another person that is of a description prohibited by this Act.
- (2) A relevant non-contractual term is unenforceable against a person in so far as it constitutes, promotes or provides for treatment of that or another person that is of a description prohibited by this Act, in so far as this Act relates to disability.
- (3) A relevant non-contractual term is a term which –
  - (a) is a term of an agreement that is not a contract, and
  - (b) relates to the provision of an employment service within section 56(2)(a) to (e) or to the provision under a group insurance arrangement of facilities by way of insurance.
- (4) A reference in subsection (1) or (2) to treatment of a description prohibited by this Act does not include –
  - (a) a reference to the inclusion of a term in a contract referred to in section 70(2)(a) or 76(2), or

- (b) a reference to the failure to include a term in a contract as referred to in section 70(2)(b).
- (5) Subsection (4) does not affect the application of section 148(2) to this section.

#### **143 Removal or modification of unenforceable terms**

- (1) A county court or the sheriff may, on an application by a person who has an interest in a contract or other agreement which includes a term that is unenforceable as a result of section 142, make an order for the term to be removed or modified.
- (2) An order under this section must not be made unless every person who would be affected by it—
  - (a) has been given notice of the application (except where notice is dispensed with in accordance with rules of court), and
  - (b) has been afforded an opportunity to make representations to the county court or sheriff.
- (3) An order under this section may include provision in respect of a period before the making of the order.

#### **144 Contracting out**

- (1) A term of a contract is unenforceable by a person in whose favour it would operate in so far as it purports to exclude or limit a provision of or made under this Act.
- (2) A relevant non-contractual term (as defined by section 142) is unenforceable by a person in whose favour it would operate in so far as it purports to exclude or limit a provision of or made under this Act, in so far as the provision relates to disability.
- (3) This section does not apply to a contract which settles a claim within section 114.
- (4) This section does not apply to a contract which settles a complaint within section 120 if the contract—
  - (a) is made with the assistance of a conciliation officer, or
  - (b) is a qualifying compromise contract.
- (5) A contract within subsection (4) includes a contract which settles a complaint relating to a breach of an equality clause or rule or of a non-discrimination rule.
- (6) A contract within subsection (4) includes an agreement by the parties to a dispute to submit the dispute to arbitration if—
  - (a) the dispute is covered by a scheme having effect by virtue of an order under section 212A of the Trade Union and Labour Relations (Consolidation) Act 1992, and
  - (b) the agreement is to submit the dispute to arbitration in accordance with the scheme.

*Collective agreements and rules of undertakings***145 Void and unenforceable terms**

- (1) A term of a collective agreement is void in so far as it constitutes, promotes or provides for treatment of a description prohibited by this Act.
- (2) A rule of an undertaking is unenforceable against a person in so far as it constitutes, promotes or provides for treatment of the person that is of a description prohibited by this Act.

**146 Declaration in respect of void term, etc.**

- (1) A qualifying person (P) may make a complaint to an employment tribunal that a term is void, or that a rule is unenforceable, as a result of section 145.
- (2) But subsection (1) applies only if –
  - (a) the term or rule may in the future have effect in relation to P, and
  - (b) where the complaint alleges that the term or rule provides for treatment of a description prohibited by this Act, P may in the future be subjected to treatment that would (if P were subjected to it in present circumstances) be of that description.
- (3) If the tribunal finds that the complaint is well-founded, it must make an order declaring that the term is void or the rule is unenforceable.
- (4) An order under this section may include provision in respect of a period before the making of the order.
- (5) In the case of a complaint about a term of a collective agreement, where the term is one made by or on behalf of a person of a description specified in the first column of the table, a qualifying person is a person of a description specified in the second column.

<i>Description of person who made collective agreement</i>	<i>Qualifying person</i>
Employer	A person who is, or is seeking to be, an employee of that employer
Organisation of employers	A person who is, or is seeking to be, an employee of an employer who is a member of that organisation
Association of organisations of employers	A person who is, or is seeking to be, an employee of an employer who is a member of an organisation in that association

- (6) In the case of a complaint about a rule of an undertaking, where the rule is one made by or on behalf of a person of a description specified in the first column of the table, a qualifying person is a person of a description specified in the second column.

<i>Description of person who made rule of undertaking</i>	<i>Qualifying person</i>
Employer	A person who is, or is seeking to be, an employee of that employer
Trade organisation or qualifications body	<p>A person who is, or is seeking to be, a member of the organisation or body</p> <p>A person upon whom the body has conferred a relevant qualification</p> <p>A person seeking conferment by the body of a relevant qualification</p>

*Supplementary***147 Meaning of “qualifying compromise contract”**

- (1) This section applies for the purposes of this Part.
- (2) A qualifying compromise contract is a contract in relation to which each of the conditions in subsection (3) is met.
- (3) Those conditions are that –
  - (a) the contract is in writing,
  - (b) the contract relates to the particular complaint,
  - (c) the complainant has, before entering into the contract, received advice from an independent adviser about its terms and effect (including, in particular, its effect on the complainant’s ability to pursue the complaint before an employment tribunal),
  - (d) on the date of the giving of the advice, there is in force a contract of insurance, or an indemnity provided for members of a profession or professional body, covering the risk of a claim by the complainant in respect of loss arising from the advice,
  - (e) the contract identifies the adviser, and
  - (f) the contract states that the conditions in paragraphs (c) and (d) are met.
- (4) Each of the following is an independent adviser –
  - (a) a qualified lawyer;
  - (b) an officer, official, employee or member of an independent trade union certified in writing by the trade union as competent to give advice and as authorised to do so on its behalf;
  - (c) a worker at an advice centre (whether as an employee or a volunteer) certified in writing by the centre as competent to give advice and as authorised to do so on its behalf;
  - (d) a person of such description as may be specified by order.
- (5) Despite subsection (4), none of the following is an independent adviser in relation to a qualifying compromise contract –
  - (a) a person who is a party to the contract or the complaint;
  - (b) a person who is connected to a person within paragraph (a);

- (c) a person who is employed by a person within paragraph (a) or (b);
  - (d) a person who is acting for a person within paragraph (a) or (b) in relation to the contract or the complaint;
  - (e) a person within subsection (4)(b) or (c), if the trade union or advice centre is a person within paragraph (a) or (b);
  - (f) a person within subsection (4)(c) to whom the complainant makes a payment for the advice.
- (6) A “qualified lawyer”, for the purposes of subsection (4)(a), is –
- (a) in relation to England and Wales, a person who, for the purposes of the Legal Services Act 2007, is an authorised person in relation to an activity which constitutes the exercise of a right of audience or the conduct of litigation;
  - (b) in relation to Scotland, an advocate (whether in practice as such or employed to give legal advice) or a solicitor who holds a practising certificate.
- (7) “Independent trade union” has the meaning given in section 5 of the Trade Union and Labour Relations (Consolidation) Act 1992.
- (8) Two persons are connected for the purposes of subsection (5) if –
- (a) one is a company of which the other (directly or indirectly) has control, or
  - (b) both are companies of which a third person (directly or indirectly) has control.
- (9) Two persons are also connected for the purposes of subsection (5) in so far as a connection between them gives rise to a conflict of interest in relation to the contract or the complaint.

#### 148 Interpretation

- (1) This section applies for the purposes of this Part.
- (2) A reference to treatment of a description prohibited by this Act does not include treatment in so far as it is treatment that would contravene –
- (a) Part 1 (public sector duty regarding socio-economic inequalities), or
  - (b) Chapter 1 of Part 11 (public sector equality duty).
- (3) “Group insurance arrangement” means an arrangement between an employer and another person for the provision by that other person of facilities by way of insurance to the employer’s employees (or a class of those employees).
- (4) “Collective agreement” has the meaning given in section 178 of the Trade Union and Labour Relations (Consolidation) Act 1992.
- (5) A rule of an undertaking is a rule within subsection (6) or (7).
- (6) A rule within this subsection is a rule made by a trade organisation or a qualifications body for application to –
- (a) its members or prospective members,
  - (b) persons on whom it has conferred a relevant qualification, or
  - (c) persons seeking conferment by it of a relevant qualification.
- (7) A rule within this subsection is a rule made by an employer for application to –
- (a) employees,

- (b) persons who apply for employment, or
  - (c) persons the employer considers for employment.
- (8) “Trade organisation”, “qualifications body” and “relevant qualification” each have the meaning given in Part 5 (work).

## PART 11

### ADVANCEMENT OF EQUALITY

#### CHAPTER 1

##### PUBLIC SECTOR EQUALITY DUTY

### 149 Public sector equality duty

- (1) A public authority must, in the exercise of its functions, have due regard to the need to—
  - (a) eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under this Act;
  - (b) advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it;
  - (c) foster good relations between persons who share a relevant protected characteristic and persons who do not share it.
- (2) A person who is not a public authority but who exercises public functions must, in the exercise of those functions, have due regard to the matters mentioned in subsection (1).
- (3) Having due regard to the need to advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it involves having due regard, in particular, to the need to—
  - (a) remove or minimise disadvantages suffered by persons who share a relevant protected characteristic that are connected to that characteristic;
  - (b) take steps to meet the needs of persons who share a relevant protected characteristic that are different from the needs of persons who do not share it;
  - (c) encourage persons who share a relevant protected characteristic to participate in public life or in any other activity in which participation by such persons is disproportionately low.
- (4) The steps involved in meeting the needs of disabled persons that are different from the needs of persons who are not disabled include, in particular, steps to take account of disabled persons’ disabilities.
- (5) Having due regard to the need to foster good relations between persons who share a relevant protected characteristic and persons who do not share it involves having due regard, in particular, to the need to—
  - (a) tackle prejudice, and
  - (b) promote understanding.
- (6) Compliance with the duties in this section may involve treating some persons more favourably than others; but that is not to be taken as permitting conduct that would otherwise be prohibited by or under this Act.



- (7) The relevant protected characteristics are –
- age;
  - disability;
  - gender reassignment;
  - pregnancy and maternity;
  - race;
  - religion or belief;
  - sex;
  - sexual orientation.
- (8) A reference to conduct that is prohibited by or under this Act includes a reference to –
- (a) a breach of an equality clause or rule;
  - (b) a breach of a non-discrimination rule.
- (9) Schedule 18 (exceptions) has effect.

#### **150 Public authorities and public functions**

- (1) A public authority is a person who is specified in Schedule 19.
- (2) In that Schedule –
- Part 1 specifies public authorities generally;
  - Part 2 specifies relevant Welsh authorities;
  - Part 3 specifies relevant Scottish authorities.
- (3) A public authority specified in Schedule 19 is subject to the duty imposed by section 149(1) in relation to the exercise of all of its functions unless subsection (4) applies.
- (4) A public authority specified in that Schedule in respect of certain specified functions is subject to that duty only in respect of the exercise of those functions.
- (5) A public function is a function that is a function of a public nature for the purposes of the Human Rights Act 1998.

#### **151 Power to specify public authorities**

- (1) A Minister of the Crown may by order amend Part 1, 2 or 3 of Schedule 19.
- (2) The Welsh Ministers may by order amend Part 2 of Schedule 19.
- (3) The Scottish Ministers may by order amend Part 3 of Schedule 19.
- (4) The power under subsection (1), (2) or (3) may not be exercised so as to –
- (a) add an entry to Part 1 relating to a relevant Welsh or Scottish authority or a cross-border Welsh or Scottish authority;
  - (b) add an entry to Part 2 relating to a person who is not a relevant Welsh authority;
  - (c) add an entry to Part 3 relating to a person who is not a relevant Scottish authority.
- (5) A Minister of the Crown may by order amend Schedule 19 so as to make provision relating to a cross-border Welsh or Scottish authority.

- (6) On the first exercise of the power under subsection (5) to add an entry relating to a cross-border Welsh or Scottish authority to Schedule 19, a Minister of the Crown must—
- (a) add a Part 4 to the Schedule for cross-border authorities, and
  - (b) add the cross-border Welsh or Scottish authority to that Part.
- (7) Any subsequent exercise of the power under subsection (5) to add an entry relating to a cross-border Welsh or Scottish authority to Schedule 19 must add that entry to Part 4 of the Schedule.
- (8) An order may not be made under this section so as to extend the application of section 149 unless the person making it considers that the extension relates to a person by whom a public function is exercisable.
- (9) An order may not be made under this section so as to extend the application of section 149 to—
- (a) the exercise of a function referred to in paragraph 3 of Schedule 18 (judicial functions, etc);
  - (b) a person listed in paragraph 4(2)(a) to (e) of that Schedule (Parliament, devolved legislatures and General Synod);
  - (c) the exercise of a function listed in paragraph 4(3) of that Schedule (proceedings in Parliament or devolved legislatures).

## 152 Power to specify public authorities: consultation and consent

- (1) Before making an order under a provision specified in the first column of the Table, a Minister of the Crown must consult the person or persons specified in the second column.

<i>Provision</i>	<i>Consultees</i>
Section 151(1)	The Commission
Section 151(1), so far as relating to a relevant Welsh authority	The Welsh Ministers
Section 151(1), so far as relating to a relevant Scottish authority	The Scottish Ministers
Section 151(5)	The Commission
Section 151(5), so far as relating to a cross-border Welsh authority	The Welsh Ministers
Section 151(5), so far as relating to a cross-border Scottish authority	The Scottish Ministers

- (2) Before making an order under section 151(2), the Welsh Ministers must—
- (a) obtain the consent of a Minister of the Crown, and
  - (b) consult the Commission.
- (3) Before making an order under section 151(3), the Scottish Ministers must—
- (a) obtain the consent of a Minister of the Crown, and
  - (b) consult the Commission.



### 153 Power to impose specific duties

- (1) A Minister of the Crown may by regulations impose duties on a public authority specified in Part 1 of Schedule 19 for the purpose of enabling the better performance by the authority of the duty imposed by section 149(1).
- (2) The Welsh Ministers may by regulations impose duties on a public authority specified in Part 2 of Schedule 19 for that purpose.
- (3) The Scottish Ministers may by regulations impose duties on a public authority specified in Part 3 of Schedule 19 for that purpose.
- (4) Before making regulations under this section, the person making them must consult the Commission.

### 154 Power to impose specific duties: cross-border authorities

- (1) If a Minister of the Crown exercises the power in section 151(5) to add an entry for a public authority to Part 4 of Schedule 19, the Minister must include after the entry a letter specified in the first column of the Table in subsection (3).
- (2) Where a letter specified in the first column of the Table in subsection (3) is included after an entry for a public authority in Part 4 of Schedule 19, the person specified in the second column of the Table—
  - (a) may by regulations impose duties on the authority for the purpose of enabling the better performance by the authority of the duty imposed by section 149(1), subject to such limitations as are specified in that column;
  - (b) must in making the regulations comply with the procedural requirement specified in that column.
- (3) This is the Table—

<i>Letter</i>	<i>Person by whom regulations may be made and procedural requirements</i>
A	<p>Regulations may be made by a Minister of the Crown in relation to the authority's functions that are not devolved Welsh functions.</p> <p>The Minister of the Crown must consult the Welsh Ministers before making the regulations.</p> <p>Regulations may be made by the Welsh Ministers in relation to the authority's devolved Welsh functions.</p> <p>The Welsh Ministers must consult a Minister of the Crown before making the regulations.</p>
B	<p>Regulations may be made by a Minister of the Crown in relation to the authority's functions that are not devolved Scottish functions.</p> <p>The Minister of the Crown must consult the Scottish Ministers before making the regulations.</p>

<i>Letter</i>	<i>Person by whom regulations may be made and procedural requirements</i>
C	<p>Regulations may be made by the Scottish Ministers in relation to the authority's devolved Scottish functions.</p> <p>The Scottish Ministers must consult a Minister of the Crown before making the regulations.</p> <p>Regulations may be made by a Minister of the Crown in relation to the authority's functions that are neither devolved Welsh functions nor devolved Scottish functions.</p> <p>The Minister of the Crown must consult the Welsh Ministers and the Scottish Ministers before making the regulations.</p> <p>Regulations may be made by the Welsh Ministers in relation to the authority's devolved Welsh functions.</p> <p>The Welsh Ministers must consult a Minister of the Crown before making the regulations.</p> <p>Regulations may be made by the Scottish Ministers in relation to the authority's devolved Scottish functions.</p> <p>The Scottish Ministers must consult a Minister of the Crown before making the regulations.</p>
D	<p>The regulations may be made by a Minister of the Crown.</p> <p>The Minister of the Crown must consult the Welsh Ministers before making the regulations.</p>

- (4) Before making regulations under subsection (2), the person making them must consult the Commission.

### **155 Power to impose specific duties: supplementary**

- (1) Regulations under section 153 or 154 may require a public authority to consider such matters as may be specified from time to time by –
- (a) a Minister of the Crown, where the regulations are made by a Minister of the Crown;
  - (b) the Welsh Ministers, where the regulations are made by the Welsh Ministers;
  - (c) the Scottish Ministers, where the regulations are made by the Scottish Ministers.
- (2) Regulations under section 153 or 154 may impose duties on a public authority that is a contracting authority within the meaning of the Public Sector Directive in connection with its public procurement functions.
- (3) In subsection (2) –

“public procurement functions” means functions the exercise of which is regulated by the Public Sector Directive;

“the Public Sector Directive” means Directive 2004/18/EC of the European Parliament and of the Council of 31 March 2004 on the coordination of procedures for the award of public works contracts, public supply contracts and public service contracts, as amended from time to time.

- (4) Subsections (1) and (2) do not affect the generality of section 153 or 154(2)(a).
- (5) A duty imposed on a public authority under section 153 or 154 may be modified or removed by regulations made by –
  - (a) a Minister of the Crown, where the original duty was imposed by regulations made by a Minister of the Crown;
  - (b) the Welsh Ministers, where the original duty was imposed by regulations made by the Welsh Ministers;
  - (c) the Scottish Ministers, where the original duty was imposed by regulations made by the Scottish Ministers.

## 156 Enforcement

A failure in respect of a performance of a duty imposed by or under this Chapter does not confer a cause of action at private law.

## 157 Interpretation

- (1) This section applies for the purposes of this Chapter.
- (2) A relevant Welsh authority is a person (other than the Assembly Commission) whose functions –
  - (a) are exercisable only in or as regards Wales, and
  - (b) are wholly or mainly devolved Welsh functions.
- (3) A cross-border Welsh authority is a person other than a relevant Welsh authority (or the Assembly Commission) who has any function that –
  - (a) is exercisable in or as regards Wales, and
  - (b) is a devolved Welsh function.
- (4) The Assembly Commission has the same meaning as in the Government of Wales Act 2006.
- (5) A function is a devolved Welsh function if it relates to –
  - (a) a matter in respect of which functions are exercisable by the Welsh Ministers, the First Minister for Wales or the Counsel General to the Welsh Assembly Government, or
  - (b) a matter within the legislative competence of the National Assembly for Wales.
- (6) A relevant Scottish authority is a public body, public office or holder of a public office –
  - (a) which is not a cross-border Scottish authority or the Scottish Parliamentary Corporate Body,
  - (b) whose functions are exercisable only in or as regards Scotland, and
  - (c) at least some of whose functions do not relate to reserved matters.

- (7) A cross-border Scottish authority is a cross-border public authority within the meaning given by section 88(5) of the Scotland Act 1998.
- (8) A function is a devolved Scottish function if it –
  - (a) is exercisable in or as regards Scotland, and
  - (b) does not relate to reserved matters.
- (9) Reserved matters has the same meaning as in the Scotland Act 1998.

## CHAPTER 2

### POSITIVE ACTION

#### 158 Positive action: general

- (1) This section applies if a person (P) reasonably thinks that –
  - (a) persons who share a protected characteristic suffer a disadvantage connected to the characteristic,
  - (b) persons who share a protected characteristic have needs that are different from the needs of persons who do not share it, or
  - (c) participation in an activity by persons who share a protected characteristic is disproportionately low.
- (2) This Act does not prohibit P from taking any action which is a proportionate means of achieving the aim of –
  - (a) enabling or encouraging persons who share the protected characteristic to overcome or minimise that disadvantage,
  - (b) meeting those needs, or
  - (c) enabling or encouraging persons who share the protected characteristic to participate in that activity.
- (3) Regulations may specify action, or descriptions of action, to which subsection (2) does not apply.
- (4) This section does not apply to –
  - (a) action within section 159(3), or
  - (b) anything that is permitted by virtue of section 104.
- (5) If section 104(7) is repealed by virtue of section 105, this section will not apply to anything that would have been so permitted but for the repeal.
- (6) This section does not enable P to do anything that is prohibited by or under an enactment other than this Act.

#### 159 Positive action: recruitment and promotion

- (1) This section applies if a person (P) reasonably thinks that –
  - (a) persons who share a protected characteristic suffer a disadvantage connected to the characteristic, or
  - (b) participation in an activity by persons who share a protected characteristic is disproportionately low.
- (2) Part 5 (work) does not prohibit P from taking action within subsection (3) with the aim of enabling or encouraging persons who share the protected characteristic to –

- (a) overcome or minimise that disadvantage, or
  - (b) participate in that activity.
- (3) That action is treating a person (A) more favourably in connection with recruitment or promotion than another person (B) because A has the protected characteristic but B does not.
- (4) But subsection (2) applies only if—
- (a) A is as qualified as B to be recruited or promoted,
  - (b) P does not have a policy of treating persons who share the protected characteristic more favourably in connection with recruitment or promotion than persons who do not share it, and
  - (c) taking the action in question is a proportionate means of achieving the aim referred to in subsection (2).
- (5) “Recruitment” means a process for deciding whether to—
- (a) offer employment to a person,
  - (b) make contract work available to a contract worker,
  - (c) offer a person a position as a partner in a firm or proposed firm,
  - (d) offer a person a position as a member of an LLP or proposed LLP,
  - (e) offer a person a pupillage or tenancy in barristers’ chambers,
  - (f) take a person as an advocate’s devil or offer a person membership of an advocate’s stable,
  - (g) offer a person an appointment to a personal office,
  - (h) offer a person an appointment to a public office, recommend a person for such an appointment or approve a person’s appointment to a public office, or
  - (i) offer a person a service for finding employment.
- (6) This section does not enable P to do anything that is prohibited by or under an enactment other than this Act.

## PART 12

### DISABLED PERSONS: TRANSPORT

#### CHAPTER 1

##### TAXIS, ETC.

### 160 Taxi accessibility regulations

- (1) The Secretary of State may make regulations (in this Chapter referred to as “taxi accessibility regulations”) for securing that it is possible for disabled persons—
- (a) to get into and out of taxis in safety;
  - (b) to do so while in wheelchairs;
  - (c) to travel in taxis in safety and reasonable comfort;
  - (d) to do so while in wheelchairs.
- (2) The regulations may, in particular, require a regulated taxi to conform with provision as to—
- (a) the size of a door opening for the use of passengers;

- (b) the floor area of the passenger compartment;
  - (c) the amount of headroom in the passenger compartment;
  - (d) the fitting of restraining devices designed to ensure the stability of a wheelchair while the taxi is moving.
- (3) The regulations may also—
- (a) require the driver of a regulated taxi which is plying for hire, or which has been hired, to comply with provisions as to the carrying of ramps or other devices designed to facilitate the loading and unloading of wheelchairs;
  - (b) require the driver of a regulated taxi in which a disabled person is being carried while in a wheelchair to comply with provisions as to the position in which the wheelchair is to be secured.
- (4) The driver of a regulated taxi which is plying for hire or has been hired commits an offence—
- (a) by failing to comply with a requirement of the regulations, or
  - (b) if the taxi fails to conform with any provision of the regulations with which it is required to conform.
- (5) A person guilty of an offence under subsection (4) is liable on summary conviction to a fine not exceeding level 3 on the standard scale.
- (6) In this section—
- “passenger compartment” has such meaning as is specified in taxi accessibility regulations;
  - “regulated taxi” means a taxi to which taxi accessibility regulations are expressed to apply.

### **161 Control of numbers of licensed taxis: exception**

- (1) This section applies if—
- (a) an application for a licence in respect of a vehicle is made under section 37 of the Town Police Clauses Act 1847,
  - (b) it is possible for a disabled person—
    - (i) to get into and out of the vehicle in safety,
    - (ii) to travel in the vehicle in safety and reasonable comfort, and
    - (iii) to do the things mentioned in sub-paragraphs (i) and (ii) while in a wheelchair of a size prescribed by the Secretary of State, and
  - (c) the proportion of taxis licensed in respect of the area to which the licence would (if granted) apply that conform to the requirement in paragraph (b) is less than the proportion that is prescribed by the Secretary of State.
- (2) Section 16 of the Transport Act 1985 (which modifies the provisions of the Town Police Clauses Act 1847 about hackney carriages to allow a licence to ply for hire to be refused in order to limit the number of licensed carriages) does not apply in relation to the vehicle; and those provisions of the Town Police Clauses Act 1847 are to have effect subject to this section.
- (3) In section 16 of the Transport Act 1985, after “shall” insert “(subject to section 161 of the Equality Act 2010)”.



## 162 Designated transport facilities

- (1) The appropriate authority may by regulations provide for the application of any taxi provision (with or without modification) to –
  - (a) vehicles used for the provision of services under a franchise agreement, or
  - (b) drivers of such vehicles.
- (2) A franchise agreement is a contract entered into by the operator of a designated transport facility for the provision, by the other party to the contract, of hire car services –
  - (a) for members of the public using any part of the facility, and
  - (b) which involve vehicles entering any part of the facility.
- (3) In this section –
  - “appropriate authority” means –
    - (a) in relation to transport facilities in England and Wales, the Secretary of State;
    - (b) in relation to transport facilities in Scotland, the Scottish Ministers;
  - “designated” means designated by order made by the appropriate authority;
  - “hire car” has such meaning as is prescribed by the appropriate authority;
  - “operator”, in relation to a transport facility, means a person who is concerned with the management or operation of the facility;
  - “taxi provision” means a provision of –
    - (a) this Chapter, or
    - (b) regulations made in pursuance of section 20(2A) of the Civic Government (Scotland) Act 1982, which applies in relation to taxis or drivers of taxis;
  - “transport facility” means premises which form part of a port, airport, railway station or bus station.
- (4) For the purposes of section 2(2) of the European Communities Act 1972 (implementation of EU obligations), the Secretary of State may exercise a power conferred by this section on the Scottish Ministers.

## 163 Taxi licence conditional on compliance with taxi accessibility regulations

- (1) A licence for a taxi to ply for hire must not be granted unless the vehicle conforms with the provisions of taxi accessibility regulations with which a vehicle is required to conform if it is licensed.
- (2) Subsection (1) does not apply if a licence is in force in relation to the vehicle at any time during the period of 28 days immediately before the day on which the licence is granted.
- (3) The Secretary of State may by order provide for subsection (2) to cease to have effect on a specified date.
- (4) The power under subsection (3) may be exercised differently for different areas or localities.

#### **164 Exemption from taxi accessibility regulations**

- (1) The Secretary of State may by regulations provide for a relevant licensing authority to apply for an order (an “exemption order”) exempting the authority from the requirements of section 163.
- (2) Regulations under subsection (1) may, in particular, make provision requiring an authority proposing to apply for an exemption order –
  - (a) to carry out such consultation as is specified;
  - (b) to publish its proposals in the specified manner;
  - (c) before applying for the order, to consider representations made about the proposal;
  - (d) to make the application in the specified form.

In this subsection “specified” means specified in the regulations.

- (3) An authority may apply for an exemption order only if it is satisfied –
  - (a) that, having regard to the circumstances in its area, it is inappropriate for section 163 to apply, and
  - (b) that the application of that section would result in an unacceptable reduction in the number of taxis in its area.
- (4) After consulting the Disabled Persons Transport Advisory Committee and such other persons as the Secretary of State thinks appropriate, the Secretary of State may –
  - (a) make an exemption order in the terms of the application for the order;
  - (b) make an exemption order in such other terms as the Secretary of State thinks appropriate;
  - (c) refuse to make an exemption order.
- (5) The Secretary of State may by regulations make provision requiring a taxi plying for hire in an area in respect of which an exemption order is in force to conform with provisions of the regulations as to the fitting and use of swivel seats.
- (6) Regulations under subsection (5) may make provision corresponding to section 163.
- (7) In this section –
 

“relevant licensing authority” means an authority responsible for licensing taxis in any area of England and Wales other than the area to which the Metropolitan Public Carriage Act 1869 applies;

“swivel seats” has such meaning as is specified in regulations under subsection (5).

#### **165 Passengers in wheelchairs**

- (1) This section imposes duties on the driver of a designated taxi which has been hired –
  - (a) by or for a disabled person who is in a wheelchair, or
  - (b) by another person who wishes to be accompanied by a disabled person who is in a wheelchair.
- (2) This section also imposes duties on the driver of a designated private hire vehicle, if a person within paragraph (a) or (b) of subsection (1) has indicated to the driver that the person wishes to travel in the vehicle.



- (3) For the purposes of this section –
  - (a) a taxi or private hire vehicle is “designated” if it appears on a list maintained under section 167;
  - (b) “the passenger” means the disabled person concerned.
- (4) The duties are –
  - (a) to carry the passenger while in the wheelchair;
  - (b) not to make any additional charge for doing so;
  - (c) if the passenger chooses to sit in a passenger seat, to carry the wheelchair;
  - (d) to take such steps as are necessary to ensure that the passenger is carried in safety and reasonable comfort;
  - (e) to give the passenger such mobility assistance as is reasonably required.
- (5) Mobility assistance is assistance –
  - (a) to enable the passenger to get into or out of the vehicle;
  - (b) if the passenger wishes to remain in the wheelchair, to enable the passenger to get into and out of the vehicle while in the wheelchair;
  - (c) to load the passenger’s luggage into or out of the vehicle;
  - (d) if the passenger does not wish to remain in the wheelchair, to load the wheelchair into or out of the vehicle.
- (6) This section does not require the driver –
  - (a) unless the vehicle is of a description prescribed by the Secretary of State, to carry more than one person in a wheelchair, or more than one wheelchair, on any one journey;
  - (b) to carry a person in circumstances in which it would otherwise be lawful for the driver to refuse to carry the person.
- (7) A driver of a designated taxi or designated private hire vehicle commits an offence by failing to comply with a duty imposed on the driver by this section.
- (8) A person guilty of an offence under subsection (7) is liable on summary conviction to a fine not exceeding level 3 on the standard scale.
- (9) It is a defence for a person charged with the offence to show that at the time of the alleged offence –
  - (a) the vehicle conformed to the accessibility requirements which applied to it, but
  - (b) it would not have been possible for the wheelchair to be carried safely in the vehicle.
- (10) In this section and sections 166 and 167 “private hire vehicle” means –
  - (a) a vehicle licensed under section 48 of the Local Government (Miscellaneous Provisions) Act 1976;
  - (b) a vehicle licensed under section 7 of the Private Hire Vehicles (London) Act 1998;
  - (c) a vehicle licensed under an equivalent provision of a local enactment;
  - (d) a private hire car licensed under section 10 of the Civic Government (Scotland) Act 1982.

**166 Passengers in wheelchairs: exemption certificates**

- (1) A licensing authority must issue a person with a certificate exempting the person from the duties imposed by section 165 (an “exemption certificate”) if satisfied that it is appropriate to do so—
  - (a) on medical grounds, or
  - (b) on the ground that the person’s physical condition makes it impossible or unreasonably difficult for the person to comply with those duties.
- (2) An exemption certificate is valid for such period as is specified in the certificate.
- (3) The driver of a designated taxi is exempt from the duties imposed by section 165 if—
  - (a) an exemption certificate issued to the driver is in force, and
  - (b) the prescribed notice of the exemption is exhibited on the taxi in the prescribed manner.
- (4) The driver of a designated private hire vehicle is exempt from the duties imposed by section 165 if—
  - (a) an exemption certificate issued to the driver is in force, and
  - (b) the prescribed notice of the exemption is exhibited on the vehicle in the prescribed manner.
- (5) For the purposes of this section, a taxi or private hire vehicle is “designated” if it appears on a list maintained under section 167.
- (6) In this section and section 167 “licensing authority”, in relation to any area, means the authority responsible for licensing taxis or, as the case may be, private hire vehicles in that area.

**167 Lists of wheelchair-accessible vehicles**

- (1) For the purposes of section 165, a licensing authority may maintain a list of vehicles falling within subsection (2).
- (2) A vehicle falls within this subsection if—
  - (a) it is either a taxi or a private hire vehicle, and
  - (b) it conforms to such accessibility requirements as the licensing authority thinks fit.
- (3) A licensing authority may, if it thinks fit, decide that a vehicle may be included on a list maintained under this section only if it is being used, or is to be used, by the holder of a special licence under that licence.
- (4) In subsection (3) “special licence” has the meaning given by section 12 of the Transport Act 1985 (use of taxis or hire cars in providing local services).
- (5) “Accessibility requirements” are requirements for securing that it is possible for disabled persons in wheelchairs—
  - (a) to get into and out of vehicles in safety, and
  - (b) to travel in vehicles in safety and reasonable comfort,either staying in their wheelchairs or not (depending on which they prefer).
- (6) The Secretary of State may issue guidance to licensing authorities as to—
  - (a) the accessibility requirements which they should apply for the purposes of this section;

- (b) any other aspect of their functions under or by virtue of this section.
- (7) A licensing authority which maintains a list under subsection (1) must have regard to any guidance issued under subsection (6).

### 168 Assistance dogs in taxis

- (1) This section imposes duties on the driver of a taxi which has been hired –
  - (a) by or for a disabled person who is accompanied by an assistance dog, or
  - (b) by another person who wishes to be accompanied by a disabled person with an assistance dog.
- (2) The driver must –
  - (a) carry the disabled person’s dog and allow it to remain with that person;
  - (b) not make any additional charge for doing so.
- (3) The driver of a taxi commits an offence by failing to comply with a duty imposed by this section.
- (4) A person guilty of an offence under this section is liable on summary conviction to a fine not exceeding level 3 on the standard scale.

### 169 Assistance dogs in taxis: exemption certificates

- (1) A licensing authority must issue a person with a certificate exempting the person from the duties imposed by section 168 (an “exemption certificate”) if satisfied that it is appropriate to do so on medical grounds.
- (2) In deciding whether to issue an exemption certificate the authority must have regard, in particular, to the physical characteristics of the taxi which the person drives or those of any kind of taxi in relation to which the person requires the certificate.
- (3) An exemption certificate is valid –
  - (a) in respect of a specified taxi or a specified kind of taxi;
  - (b) for such period as is specified in the certificate.
- (4) The driver of a taxi is exempt from the duties imposed by section 168 if –
  - (a) an exemption certificate issued to the driver is in force with respect to the taxi, and
  - (b) the prescribed notice of the exemption is exhibited on the taxi in the prescribed manner.

The power to make regulations under paragraph (b) is exercisable by the Secretary of State.

- (5) In this section “licensing authority” means –
  - (a) in relation to the area to which the Metropolitan Public Carriage Act 1869 applies, Transport for London;
  - (b) in relation to any other area in England and Wales, the authority responsible for licensing taxis in that area.

### 170 Assistance dogs in private hire vehicles

- (1) The operator of a private hire vehicle commits an offence by failing or refusing to accept a booking for the vehicle –

- (a) if the booking is requested by or on behalf of a disabled person or a person who wishes to be accompanied by a disabled person, and
  - (b) the reason for the failure or refusal is that the disabled person will be accompanied by an assistance dog.
- (2) The operator commits an offence by making an additional charge for carrying an assistance dog which is accompanying a disabled person.
  - (3) The driver of a private hire vehicle commits an offence by failing or refusing to carry out a booking accepted by the operator –
    - (a) if the booking is made by or on behalf of a disabled person or a person who wishes to be accompanied by a disabled person, and
    - (b) the reason for the failure or refusal is that the disabled person is accompanied by an assistance dog.
  - (4) A person guilty of an offence under this section is liable on summary conviction to a fine not exceeding level 3 on the standard scale.
  - (5) In this section –
    - “driver” means a person who holds a licence under –
      - (a) section 13 of the Private Hire Vehicles (London) Act 1998 (“the 1998 Act”),
      - (b) section 51 of the Local Government (Miscellaneous Provisions) Act 1976 (“the 1976 Act”), or
      - (c) an equivalent provision of a local enactment;
    - “licensing authority”, in relation to any area in England and Wales, means the authority responsible for licensing private hire vehicles in that area;
    - “operator” means a person who holds a licence under –
      - (a) section 3 of the 1998 Act,
      - (b) section 55 of the 1976 Act, or
      - (c) an equivalent provision of a local enactment;
    - “private hire vehicle” means a vehicle licensed under –
      - (a) section 6 of the 1998 Act,
      - (b) section 48 of the 1976 Act, or
      - (c) an equivalent provision of a local enactment.

### **171 Assistance dogs in private hire vehicles: exemption certificates**

- (1) A licensing authority must issue a driver with a certificate exempting the driver from the offence under section 170(3) (an “exemption certificate”) if satisfied that it is appropriate to do so on medical grounds.
- (2) In deciding whether to issue an exemption certificate the authority must have regard, in particular, to the physical characteristics of the private hire vehicle which the person drives or those of any kind of private hire vehicle in relation to which the person requires the certificate.
- (3) An exemption certificate is valid –
  - (a) in respect of a specified private hire vehicle or a specified kind of private hire vehicle;
  - (b) for such period as is specified in the certificate.
- (4) A driver does not commit an offence under section 170(3) if –

- (a) an exemption certificate issued to the driver is in force with respect to the private hire vehicle, and
- (b) the prescribed notice of the exemption is exhibited on the vehicle in the prescribed manner.

The power to make regulations under paragraph (b) is exercisable by the Secretary of State.

- (5) In this section “driver”, “licensing authority” and “private hire vehicle” have the same meaning as in section 170.

## 172 Appeals

- (1) A person who is aggrieved by the refusal of a licensing authority in England and Wales to issue an exemption certificate under section 166, 169 or 171 may appeal to a magistrates’ court before the end of the period of 28 days beginning with the date of the refusal.
- (2) A person who is aggrieved by the refusal of a licensing authority in Scotland to issue an exemption certificate under section 166 may appeal to the sheriff before the end of the period of 28 days beginning with the date of the refusal.
- (3) On an appeal under subsection (1) or (2), the magistrates’ court or sheriff may direct the licensing authority to issue the exemption certificate to have effect for such period as is specified in the direction.
- (4) A person who is aggrieved by the decision of a licensing authority to include a vehicle on a list maintained under section 167 may appeal to a magistrates’ court or, in Scotland, the sheriff before the end of the period of 28 days beginning with the date of the inclusion.

## 173 Interpretation

- (1) In this Chapter –
  - “accessibility requirements” has the meaning given in section 167(5);
  - “assistance dog” means –
    - (a) a dog which has been trained to guide a blind person;
    - (b) a dog which has been trained to assist a deaf person;
    - (c) a dog which has been trained by a prescribed charity to assist a disabled person who has a disability that consists of epilepsy or otherwise affects the person’s mobility, manual dexterity, physical co-ordination or ability to lift, carry or otherwise move everyday objects;
    - (d) a dog of a prescribed category which has been trained to assist a disabled person who has a disability (other than one falling within paragraph (c)) of a prescribed kind;
  - “taxi” –
    - (a) means a vehicle which is licensed under section 37 of the Town Police Clauses Act 1847 or section 6 of the Metropolitan Public Carriage Act 1869, and
    - (b) in sections 162 and 165 to 167, also includes a taxi licensed under section 10 of the Civic Government (Scotland) Act 1982, but does not include a vehicle drawn by a horse or other animal;
  - “taxi accessibility regulations” has the meaning given by section 160(1).

- (2) A power to make regulations under paragraph (c) or (d) of the definition of “assistance dog” in subsection (1) is exercisable by the Secretary of State.

## CHAPTER 2

### PUBLIC SERVICE VEHICLES

#### 174 PSV accessibility regulations

- (1) The Secretary of State may make regulations (in this Chapter referred to as “PSV accessibility regulations”) for securing that it is possible for disabled persons –
- (a) to get on to and off regulated public service vehicles in safety and without unreasonable difficulty (and, in the case of disabled persons in wheelchairs, to do so while remaining in their wheelchairs), and
  - (b) to travel in such vehicles in safety and reasonable comfort.
- (2) The regulations may, in particular, make provision as to the construction, use and maintenance of regulated public service vehicles, including provision as to –
- (a) the fitting of equipment to vehicles;
  - (b) equipment to be carried by vehicles;
  - (c) the design of equipment to be fitted to, or carried by, vehicles;
  - (d) the fitting and use of restraining devices designed to ensure the stability of wheelchairs while vehicles are moving;
  - (e) the position in which wheelchairs are to be secured while vehicles are moving.
- (3) In this section “public service vehicle” means a vehicle which is –
- (a) adapted to carry more than 8 passengers, and
  - (b) a public service vehicle for the purposes of the Public Passenger Vehicles Act 1981;
- and in this Chapter “regulated public service vehicle” means a public service vehicle to which PSV accessibility regulations are expressed to apply.
- (4) The regulations may make different provision –
- (a) as respects different classes or descriptions of vehicle;
  - (b) as respects the same class or description of vehicle in different circumstances.
- (5) The Secretary of State must not make regulations under this section or section 176 or 177 without consulting –
- (a) the Disabled Persons Transport Advisory Committee, and
  - (b) such other representative organisations as the Secretary of State thinks fit.

#### 175 Offence of contravening PSV accessibility regulations

- (1) A person commits an offence by –
- (a) contravening a provision of PSV accessibility regulations;
  - (b) using on a road a regulated public service vehicle which does not conform with a provision of the regulations with which it is required to conform;



- (c) causing or permitting such a regulated public service vehicle to be used on a road.
- (2) A person guilty of an offence under this section is liable on summary conviction to a fine not exceeding level 4 on the standard scale.
- (3) If an offence under this section committed by a body corporate is committed with the consent or connivance of, or is attributable to neglect on the part of, a responsible person, the responsible person as well as the body corporate is guilty of the offence.
- (4) In subsection (3) a responsible person, in relation to a body corporate, is—
  - (a) a director, manager, secretary or similar officer;
  - (b) a person purporting to act in the capacity of a person mentioned in paragraph (a);
  - (c) in the case of a body corporate whose affairs are managed by its members, a member.
- (5) If, in Scotland, an offence committed by a partnership or an unincorporated association is committed with the consent or connivance of, or is attributable to neglect on the part of, a partner or person concerned in the management of the association, the partner or person as well as the partnership or association is guilty of the offence.

#### **176 Accessibility certificates**

- (1) A regulated public service vehicle must not be used on a road unless—
  - (a) a vehicle examiner has issued a certificate (an “accessibility certificate”) that such provisions of PSV accessibility regulations as are prescribed are satisfied in respect of the vehicle, or
  - (b) an approval certificate has been issued under section 177 in respect of the vehicle.
- (2) Regulations may make provision—
  - (a) with respect to applications for, and the issue of, accessibility certificates;
  - (b) providing for the examination of vehicles in respect of which applications have been made;
  - (c) with respect to the issue of copies of accessibility certificates which have been lost or destroyed.
- (3) The operator of a regulated public service vehicle commits an offence if the vehicle is used in contravention of this section.
- (4) A person guilty of an offence under this section is liable on summary conviction to a fine not exceeding level 4 on the standard scale.
- (5) A power to make regulations under this section is exercisable by the Secretary of State.
- (6) In this section “operator” has the same meaning as in the Public Passenger Vehicles Act 1981.

**177 Approval certificates**

- (1) The Secretary of State may approve a vehicle for the purposes of this section if satisfied that such provisions of PSV accessibility regulations as are prescribed for the purposes of section 176 are satisfied in respect of the vehicle.
- (2) A vehicle which is so approved is referred to in this section as a “type vehicle”.
- (3) Subsection (4) applies if a declaration in the prescribed form is made by an authorised person that a particular vehicle conforms in design, construction and equipment with a type vehicle.
- (4) A vehicle examiner may issue a certificate in the prescribed form (an “approval certificate”) that it conforms to the type vehicle.
- (5) Regulations may make provision –
  - (a) with respect to applications for, and grants of, approval under subsection (1);
  - (b) with respect to applications for, and the issue of, approval certificates;
  - (c) providing for the examination of vehicles in respect of which applications have been made;
  - (d) with respect to the issue of copies of approval certificates in place of certificates which have been lost or destroyed.
- (6) The Secretary of State may at any time withdraw approval of a type vehicle.
- (7) If an approval is withdrawn –
  - (a) no further approval certificates are to be issued by reference to the type vehicle; but
  - (b) an approval certificate issued by reference to the type vehicle before the withdrawal continues to have effect for the purposes of section 176.
- (8) A power to make regulations under this section is exercisable by the Secretary of State.
- (9) In subsection (3) “authorised person” means a person authorised by the Secretary of State for the purposes of that subsection.

**178 Special authorisations**

- (1) The Secretary of State may by order authorise the use on roads of –
  - (a) a regulated public service vehicle of a class or description specified by the order, or
  - (b) a regulated public service vehicle which is so specified.
- (2) Nothing in sections 174 to 177 prevents the use of a vehicle in accordance with the order.
- (3) The Secretary of State may by order make provision for securing that provisions of PSV accessibility regulations apply to regulated public service vehicles of a description specified by the order, subject to any modifications or exceptions specified by the order.
- (4) An order under subsection (1) or (3) may make the authorisation or provision (as the case may be) subject to such restrictions and conditions as are specified by or under the order.



- (5) Section 207(2) does not require an order under this section that applies only to a specified vehicle, or to vehicles of a specified person, to be made by statutory instrument; but such an order is as capable of being amended or revoked as an order made by statutory instrument.

### **179 Reviews and appeals**

- (1) Subsection (2) applies if the Secretary of State refuses an application for the approval of a vehicle under section 177(1) and, before the end of the prescribed period, the applicant –
- (a) asks the Secretary of State to review the decision, and
  - (b) pays any fee fixed under section 180.
- (2) The Secretary of State must –
- (a) review the decision, and
  - (b) in doing so, consider any representations made in writing by the applicant before the end of the prescribed period.
- (3) A person applying for an accessibility certificate or an approval certificate may appeal to the Secretary of State against the refusal of a vehicle examiner to issue the certificate.
- (4) An appeal must be made within the prescribed time and in the prescribed manner.
- (5) Regulations may make provision as to the procedure to be followed in connection with appeals.
- (6) On the determination of an appeal, the Secretary of State may –
- (a) confirm, vary or reverse the decision appealed against;
  - (b) give directions to the vehicle examiner for giving effect to the Secretary of State's decision.
- (7) A power to make regulations under this section is exercisable by the Secretary of State.

### **180 Fees**

- (1) The Secretary of State may charge such fees, payable at such times, as are prescribed in respect of –
- (a) applications for, and grants of, approval under section 177(1);
  - (b) applications for, and the issue of, accessibility certificates and approval certificates;
  - (c) copies of such certificates;
  - (d) reviews and appeals under section 179.
- (2) Fees received by the Secretary of State must be paid into the Consolidated Fund.
- (3) The power to make regulations under subsection (1) is exercisable by the Secretary of State.
- (4) The regulations may make provision for the repayment of fees, in whole or in part, in such circumstances as are prescribed.

- (5) Before making the regulations the Secretary of State must consult such representative organisations as the Secretary of State thinks fit.

### **181 Interpretation**

In this Chapter –

- “accessibility certificate” has the meaning given in section 176(1);
- “approval certificate” has the meaning given in section 177(4);
- “PSV accessibility regulations” has the meaning given in section 174(1);
- “regulated public service vehicle” has the meaning given in section 174(3).

## **CHAPTER 3**

### RAIL VEHICLES

### **182 Rail vehicle accessibility regulations**

- (1) The Secretary of State may make regulations (in this Chapter referred to as “rail vehicle accessibility regulations”) for securing that it is possible for disabled persons –
- (a) to get on to and off regulated rail vehicles in safety and without unreasonable difficulty;
  - (b) to do so while in wheelchairs;
  - (c) to travel in such vehicles in safety and reasonable comfort;
  - (d) to do so while in wheelchairs.
- (2) The regulations may, in particular, make provision as to the construction, use and maintenance of regulated rail vehicles including provision as to –
- (a) the fitting of equipment to vehicles;
  - (b) equipment to be carried by vehicles;
  - (c) the design of equipment to be fitted to, or carried by, vehicles;
  - (d) the use of equipment fitted to, or carried by, vehicles;
  - (e) the toilet facilities to be provided in vehicles;
  - (f) the location and floor area of the wheelchair accommodation to be provided in vehicles;
  - (g) assistance to be given to disabled persons.
- (3) The regulations may contain different provision –
- (a) as respects different classes or descriptions of rail vehicle;
  - (b) as respects the same class or description of rail vehicle in different circumstances;
  - (c) as respects different networks.
- (4) In this section –
- “network” means any permanent way or other means of guiding or supporting rail vehicles, or any section of it;
  - “rail vehicle” means a vehicle constructed or adapted to carry passengers on a railway, tramway or prescribed system other than a vehicle used in the provision of a service for the carriage of passengers on the high-speed rail system or the conventional TEN rail system;
  - “regulated rail vehicle” means a rail vehicle to which provisions of rail vehicle accessibility regulations are expressed to apply.

- (5) In subsection (4) –
- “conventional TEN rail system” and “high-speed rail system” have the meaning given in regulation 2(3) of the Railways (Interoperability) Regulations 2006 (S.I. 2006/397);
  - “prescribed system” means a system using a mode of guided transport (“guided transport” having the same meaning as in the Transport and Works Act 1992) that is specified in rail vehicle accessibility regulations;
  - “railway” and “tramway” have the same meaning as in the Transport and Works Act 1992.
- (6) The Secretary of State must exercise the power to make rail vehicle accessibility regulations so as to secure that on and after 1 January 2020 every rail vehicle is a regulated rail vehicle.
- (7) Subsection (6) does not affect subsection (3), section 183(1) or section 207(4)(a).
- (8) Before making regulations under subsection (1) or section 183, the Secretary of State must consult –
- (a) the Disabled Persons Transport Advisory Committee, and
  - (b) such other representative organisations as the Secretary of State thinks fit.

### **183 Exemptions from rail vehicle accessibility regulations**

- (1) The Secretary of State may by order (an “exemption order”) –
- (a) authorise the use for carriage of a regulated rail vehicle even though the vehicle does not conform with the provisions of rail vehicle accessibility regulations with which it is required to conform;
  - (b) authorise a regulated rail vehicle to be used for carriage otherwise than in conformity with the provisions of rail vehicle accessibility regulations with which use of the vehicle is required to conform.
- (2) Authority under subsection (1)(a) or (b) may be for –
- (a) a regulated rail vehicle that is specified or of a specified description,
  - (b) use in specified circumstances of a regulated rail vehicle, or
  - (c) use in specified circumstances of a regulated rail vehicle that is specified or of a specified description.
- (3) The Secretary of State may by regulations make provision as to exemption orders including, in particular, provision as to –
- (a) the persons by whom applications for exemption orders may be made;
  - (b) the form in which applications are to be made;
  - (c) information to be supplied in connection with applications;
  - (d) the period for which exemption orders are to continue in force;
  - (e) the revocation of exemption orders.
- (4) After consulting the Disabled Persons Transport Advisory Committee and such other persons as the Secretary of State thinks appropriate, the Secretary of State may –
- (a) make an exemption order in the terms of the application for the order;
  - (b) make an exemption order in such other terms as the Secretary of State thinks appropriate;
  - (c) refuse to make an exemption order.

- (5) The Secretary of State may make an exemption order subject to such conditions and restrictions as are specified.
- (6) “Specified” means specified in an exemption order.

#### **184 Procedure for making exemption orders**

- (1) A statutory instrument that contains an order under section 183(1), if made without a draft having been laid before and approved by a resolution of each House of Parliament, is subject to annulment in pursuance of a resolution of either House.
- (2) The Secretary of State must consult the Disabled Persons Transport Advisory Committee before deciding which of the parliamentary procedures available under subsection (1) is to be adopted in connection with the making of any particular order under section 183(1).
- (3) An order under section 183(1) may be made without a draft of the instrument that contains it having been laid before and approved by a resolution of each House of Parliament only if—
  - (a) regulations under subsection (4) are in force; and
  - (b) the making of the order without such laying and approval is in accordance with the regulations.
- (4) The Secretary of State may by regulations set out the basis on which the Secretary of State, when making an order under section 183(1), will decide which of the parliamentary procedures available under subsection (1) is to be adopted in connection with the making of the order.
- (5) Before making regulations under subsection (4), the Secretary of State must consult—
  - (a) the Disabled Persons Transport Advisory Committee; and
  - (b) such other persons as the Secretary of State considers appropriate.

#### **185 Annual report on exemption orders**

- (1) After the end of each calendar year the Secretary of State must prepare a report on—
  - (a) the exercise in that year of the power to make orders under section 183(1);
  - (b) the exercise in that year of the discretion under section 184(1).
- (2) A report under subsection (1) must (in particular) contain—
  - (a) details of each order made under section 183(1) in the year in question;
  - (b) details of consultation carried out under sections 183(4) and 184(2) in connection with orders made in that year under section 183(1).
- (3) The Secretary of State must lay before Parliament each report prepared under this section.

#### **186 Rail vehicle accessibility: compliance**

- (1) Schedule 20 (rail vehicle accessibility: compliance) has effect.

- (2) This section and that Schedule are repealed at the end of 2010 if the Schedule is not brought into force (either fully or to any extent) before the end of that year.

### **187 Interpretation**

- (1) In this Chapter –  
“rail vehicle” and “regulated rail vehicle” have the meaning given in section 182(4);  
“rail vehicle accessibility regulations” has the meaning given in section 182(1).
- (2) For the purposes of this Chapter a vehicle is used “for carriage” if it is used for the carriage of passengers.

## **CHAPTER 4**

### SUPPLEMENTARY

### **188 Forgery, etc.**

- (1) In this section “relevant document” means –  
(a) an exemption certificate issued under section 166, 169 or 171;  
(b) a notice of a kind mentioned in section 166(3)(b), 169(4)(b) or 171(4)(b);  
(c) an accessibility certificate (see section 176);  
(d) an approval certificate (see section 177).
- (2) A person commits an offence if, with intent to deceive, the person –  
(a) forges, alters or uses a relevant document;  
(b) lends a relevant document to another person;  
(c) allows a relevant document to be used by another person;  
(d) makes or has possession of a document which closely resembles a relevant document.
- (3) A person guilty of an offence under subsection (2) is liable –  
(a) on summary conviction, to a fine not exceeding the statutory maximum;  
(b) on conviction on indictment, to imprisonment for a term not exceeding 2 years or to a fine or to both.
- (4) A person commits an offence by knowingly making a false statement for the purpose of obtaining an accessibility certificate or an approval certificate.
- (5) A person guilty of an offence under subsection (4) is liable on summary conviction to a fine not exceeding level 4 on the standard scale.

## **PART 13**

### DISABILITY: MISCELLANEOUS

### **189 Reasonable adjustments**

Schedule 21 (reasonable adjustments: supplementary) has effect.

**190 Improvements to let dwelling houses**

- (1) This section applies in relation to a lease of a dwelling house if each of the following applies –
  - (a) the tenancy is not a protected tenancy, a statutory tenancy or a secure tenancy;
  - (b) the tenant or another person occupying or intending to occupy the premises is a disabled person;
  - (c) the disabled person occupies or intends to occupy the premises as that person's only or main home;
  - (d) the tenant is entitled, with the consent of the landlord, to make improvements to the premises;
  - (e) the tenant applies to the landlord for consent to make a relevant improvement.
- (2) Where the tenant applies in writing for the consent –
  - (a) if the landlord refuses to give consent, the landlord must give the tenant a written statement of the reason why the consent was withheld;
  - (b) if the landlord neither gives nor refuses to give consent within a reasonable time, consent must be taken to have been unreasonably withheld.
- (3) If the landlord gives consent subject to a condition which is unreasonable, the consent must be taken to have been unreasonably withheld.
- (4) If the landlord's consent is unreasonably withheld, it must be taken to have been given.
- (5) On any question as to whether –
  - (a) consent was unreasonably withheld, or
  - (b) a condition imposed was unreasonable,it is for the landlord to show that it was not.
- (6) If the tenant fails to comply with a reasonable condition imposed by the landlord on the making of a relevant improvement, the failure is to be treated as a breach by the tenant of an obligation of the tenancy.
- (7) An improvement to premises is a relevant improvement if, having regard to the disabled person's disability, it is likely to facilitate that person's enjoyment of the premises.
- (8) Subsections (2) to (7) apply only in so far as provision of a like nature is not made by the lease.
- (9) In this section –

“improvement” means an alteration in or addition to the premises and includes –

  - (a) an addition to or alteration in the landlord's fittings and fixtures;
  - (b) an addition or alteration connected with the provision of services to the premises;
  - (c) the erection of a wireless or television aerial;
  - (d) carrying out external decoration;

“lease” includes a sub-lease or other tenancy, and “landlord” and “tenant” are to be construed accordingly;



- “protected tenancy” has the same meaning as in section 1 of the Rent Act 1977;
- “statutory tenancy” is to be construed in accordance with section 2 of that Act;
- “secure tenancy” has the same meaning as in section 79 of the Housing Act 1985.

## PART 14

### GENERAL EXCEPTIONS

#### 191 Statutory provisions

Schedule 22 (statutory provisions) has effect.

#### 192 National security

A person does not contravene this Act only by doing, for the purpose of safeguarding national security, anything it is proportionate to do for that purpose.

#### 193 Charities

- (1) A person does not contravene this Act only by restricting the provision of benefits to persons who share a protected characteristic if –
  - (a) the person acts in pursuance of a charitable instrument, and
  - (b) the provision of the benefits is within subsection (2).
- (2) The provision of benefits is within this subsection if it is –
  - (a) a proportionate means of achieving a legitimate aim, or
  - (b) for the purpose of preventing or compensating for a disadvantage linked to the protected characteristic.
- (3) It is not a contravention of this Act for –
  - (a) a person who provides supported employment to treat persons who have the same disability or a disability of a prescribed description more favourably than those who do not have that disability or a disability of such a description in providing such employment;
  - (b) a Minister of the Crown to agree to arrangements for the provision of supported employment which will, or may, have that effect.
- (4) If a charitable instrument enables the provision of benefits to persons of a class defined by reference to colour, it has effect for all purposes as if it enabled the provision of such benefits –
  - (a) to persons of the class which results if the reference to colour is ignored, or
  - (b) if the original class is defined by reference only to colour, to persons generally.
- (5) It is not a contravention of this Act for a charity to require members, or persons wishing to become members, to make a statement which asserts or implies membership or acceptance of a religion or belief; and for this purpose restricting the access by members to a benefit, facility or service to those who make such a statement is to be treated as imposing such a requirement.

- (6) Subsection (5) applies only if—
  - (a) the charity, or an organisation of which it is part, first imposed such a requirement before 18 May 2005, and
  - (b) the charity or organisation has not ceased since that date to impose such a requirement.
- (7) It is not a contravention of section 29 for a person, in relation to an activity which is carried on for the purpose of promoting or supporting a charity, to restrict participation in the activity to persons of one sex.
- (8) A charity regulator does not contravene this Act only by exercising a function in relation to a charity in a manner which the regulator thinks is expedient in the interests of the charity, having regard to the charitable instrument.
- (9) Subsection (1) does not apply to a contravention of—
  - (a) section 39;
  - (b) section 40;
  - (c) section 41;
  - (d) section 55, so far as relating to the provision of vocational training.
- (10) Subsection (9) does not apply in relation to disability.

#### **194 Charities: supplementary**

- (1) This section applies for the purposes of section 193.
- (2) That section does not apply to race, so far as relating to colour.
- (3) “Charity” —
  - (a) in relation to England and Wales, has the meaning given by section 1(1) of the Charities Act 2006;
  - (b) in relation to Scotland, means a body entered in the Scottish Charity Register.
- (4) “Charitable instrument” means an instrument establishing or governing a charity (including an instrument made or having effect before the commencement of this section).
- (5) The charity regulators are—
  - (a) the Charity Commission for England and Wales;
  - (b) the Scottish Charity Regulator.
- (6) Section 107(5) applies to references in subsection (5) of section 193 to members, or persons wishing to become members, of a charity.
- (7) “Supported employment” means facilities provided, or in respect of which payments are made, under section 15 of the Disabled Persons (Employment) Act 1944.

#### **195 Sport**

- (1) A person does not contravene this Act, so far as relating to sex, only by doing anything in relation to the participation of another as a competitor in a gender-affected activity.
- (2) A person does not contravene section 29, 33, 34 or 35, so far as relating to gender reassignment, only by doing anything in relation to the participation of



- a transsexual person as a competitor in a gender-affected activity if it is necessary to do so to secure in relation to the activity –
- (a) fair competition, or
  - (b) the safety of competitors.
- (3) A gender-affected activity is a sport, game or other activity of a competitive nature in circumstances in which the physical strength, stamina or physique of average persons of one sex would put them at a disadvantage compared to average persons of the other sex as competitors in events involving the activity.
- (4) In considering whether a sport, game or other activity is gender-affected in relation to children, it is appropriate to take account of the age and stage of development of children who are likely to be competitors.
- (5) A person who does anything to which subsection (6) applies does not contravene this Act only because of the nationality or place of birth of another or because of the length of time the other has been resident in a particular area or place.
- (6) This subsection applies to –
- (a) selecting one or more persons to represent a country, place or area or a related association, in a sport or game or other activity of a competitive nature;
  - (b) doing anything in pursuance of the rules of a competition so far as relating to eligibility to compete in a sport or game or other such activity.

## 196 General

Schedule 23 (general exceptions) has effect.

## 197 Age

- (1) A Minister of the Crown may by order amend this Act to provide that any of the following does not contravene this Act so far as relating to age –
- (a) specified conduct;
  - (b) anything done for a specified purpose;
  - (c) anything done in pursuance of arrangements of a specified description.
- (2) Specified conduct is conduct –
- (a) of a specified description,
  - (b) carried out in specified circumstances, or
  - (c) by or in relation to a person of a specified description.
- (3) An order under this section may –
- (a) confer on a Minister of the Crown or the Treasury a power to issue guidance about the operation of the order (including, in particular, guidance about the steps that may be taken by persons wishing to rely on an exception provided for by the order);
  - (b) require the Minister or the Treasury to carry out consultation before issuing guidance under a power conferred by virtue of paragraph (a);
  - (c) make provision (including provision to impose a requirement) that refers to guidance issued under a power conferred by virtue of paragraph (a).

- (4) Guidance given by a Minister of the Crown or the Treasury in anticipation of the making of an order under this section is, on the making of the order, to be treated as if it has been issued in accordance with the order.
- (5) For the purposes of satisfying a requirement imposed by virtue of subsection (3)(b), the Minister or the Treasury may rely on consultation carried out before the making of the order that imposes the requirement (including consultation carried out before the commencement of this section).
- (6) Provision by virtue of subsection (3)(c) may, in particular, refer to provisions of the guidance that themselves refer to a document specified in the guidance.
- (7) Guidance issued (or treated as issued) under a power conferred by virtue of subsection (3)(a) comes into force on such day as the person who issues the guidance may by order appoint; and an order under this subsection may include the text of the guidance or of extracts from it.
- (8) This section is not affected by any provision of this Act which makes special provision in relation to age.
- (9) The references to this Act in subsection (1) do not include references to –
  - (a) Part 5 (work);
  - (b) Chapter 2 of Part 6 (further and higher education).

## PART 15

### FAMILY PROPERTY

#### **198 Abolition of husband’s duty to maintain wife**

The rule of common law that a husband must maintain his wife is abolished.

#### **199 Abolition of presumption of advancement**

- (1) The presumption of advancement (by which, for example, a husband is presumed to be making a gift to his wife if he transfers property to her, or purchases property in her name) is abolished.
- (2) The abolition by subsection (1) of the presumption of advancement does not have effect in relation to –
  - (a) anything done before the commencement of this section, or
  - (b) anything done pursuant to any obligation incurred before the commencement of this section.

#### **200 Amendment of Married Women’s Property Act 1964**

- (1) In section 1 of the Married Women’s Property Act 1964 (money and property derived from housekeeping allowance made by husband to be treated as belonging to husband and wife in equal shares) –
  - (a) for “the husband for” substitute “either of them for”, and
  - (b) for “the husband and the wife” substitute “them”.
- (2) Accordingly, that Act may be cited as the Matrimonial Property Act 1964.
- (3) The amendments made by this section do not have effect in relation to any allowance made before the commencement of this section.

**201 Civil partners: housekeeping allowance**

- (1) After section 70 of the Civil Partnership Act 2004 insert –

**“70A Money and property derived from housekeeping allowance**

Section 1 of the Matrimonial Property Act 1964 (money and property derived from housekeeping allowance to be treated as belonging to husband and wife in equal shares) applies in relation to –

- (a) money derived from any allowance made by a civil partner for the expenses of the civil partnership home or for similar purposes, and
- (b) any property acquired out of such money, as it applies in relation to money derived from any allowance made by a husband or wife for the expenses of the matrimonial home or for similar purposes, and any property acquired out of such money.”
- (2) The amendment made by this section does not have effect in relation to any allowance made before the commencement of this section.

**PART 16**

## GENERAL AND MISCELLANEOUS

*Civil partnerships***202 Civil partnerships on religious premises**

- (1) The Civil Partnership Act 2004 is amended as follows.
- (2) Omit section 6(1)(b) and (2) (prohibition on use of religious premises for registration of civil partnership).
- (3) In section 6A (power to approve premises for registration of civil partnership), after subsection (2), insert –
- “(2A) Regulations under this section may provide that premises approved for the registration of civil partnerships may differ from those premises approved for the registration of civil marriages.
- (2B) Provision by virtue of subsection (2)(b) may, in particular, provide that applications for approval of premises may only be made with the consent (whether general or specific) of a person specified, or a person of a description specified, in the provision.
- (2C) The power conferred by section 258(2), in its application to the power conferred by this section, includes in particular –
- (a) power to make provision in relation to religious premises that differs from provision in relation to other premises;
- (b) power to make different provision for different kinds of religious premises.”
- (4) In that section, after subsection (3), insert –
- “(3A) For the avoidance of doubt, nothing in this Act places an obligation on religious organisations to host civil partnerships if they do not wish to do so.

- (3B) “Civil marriage” means marriage solemnised otherwise than according to the rites of the Church of England or any other religious usages.
- (3C) “Religious premises” means premises which—
- (a) are used solely or mainly for religious purposes, or
  - (b) have been so used and have not subsequently been used solely or mainly for other purposes.”

*EU obligations***203 Harmonisation**

- (1) This section applies if—
  - (a) there is a Community obligation of the United Kingdom which a Minister of the Crown thinks relates to the subject matter of the Equality Acts,
  - (b) the obligation is to be implemented by the exercise of the power under section 2(2) of the European Communities Act 1972 (the implementing power), and
  - (c) the Minister thinks that it is appropriate to make harmonising provision in the Equality Acts.
- (2) The Minister may by order make the harmonising provision.
- (3) If the Minister proposes to make an order under this section, the Minister must consult persons and organisations the Minister thinks are likely to be affected by the harmonising provision.
- (4) If, as a result of the consultation under subsection (3), the Minister thinks it appropriate to change the whole or part of the proposal, the Minister must carry out such further consultation with respect to the changes as the Minister thinks appropriate.
- (5) The Equality Acts are the Equality Act 2006 and this Act.
- (6) Harmonising provision is provision made in relation to relevant subject matter of the Equality Acts—
  - (a) which corresponds to the implementing provision, or
  - (b) which the Minister thinks is necessary or expedient in consequence of or related to provision made in pursuance of paragraph (a) or the implementing provision.
- (7) The implementing provision is provision made or to be made in exercise of the implementing power in relation to so much of the subject matter of the Equality Acts as implements a Community obligation.
- (8) Relevant subject matter of the Equality Acts is so much of the subject matter of those Acts as does not implement a Community obligation.
- (9) A harmonising provision may amend a provision of the Equality Acts.
- (10) The reference to this Act does not include a reference to this section or Schedule 24 or to a provision specified in that Schedule.
- (11) A Minister of the Crown must report to Parliament on the exercise of the power under subsection (2)—

- (a) at the end of the period of 2 years starting on the day this section comes into force;
- (b) at the end of each succeeding period of 2 years.

#### **204 Harmonisation: procedure**

- (1) If, after the conclusion of the consultation required under section 203, the Minister thinks it appropriate to proceed with the making of an order under that section, the Minister must lay before Parliament—
  - (a) a draft of a statutory instrument containing the order, together with
  - (b) an explanatory document.
- (2) The explanatory document must—
  - (a) introduce and give reasons for the harmonising provision;
  - (b) explain why the Minister thinks that the conditions in subsection (1) of section 203 are satisfied;
  - (c) give details of the consultation carried out under that section;
  - (d) give details of the representations received as a result of the consultation;
  - (e) give details of such changes as were made as a result of the representations.
- (3) Where a person making representations in response to the consultation has requested the Minister not to disclose them, the Minister must not disclose them under subsection (2)(d) if, or to the extent that, to do so would (disregarding any connection with proceedings in Parliament) constitute an actionable breach of confidence.
- (4) If information in representations made by a person in response to consultation under section 203 relates to another person, the Minister need not disclose the information under subsection (2)(d) if or to the extent that—
  - (a) the Minister thinks that the disclosure of information could adversely affect the interests of that other person, and
  - (b) the Minister has been unable to obtain the consent of that other person to the disclosure.
- (5) The Minister may not act under subsection (1) before the end of the period of 12 weeks beginning with the day on which the consultation under section 203(3) begins.
- (6) Laying a draft of a statutory instrument in accordance with subsection (1) satisfies the condition as to laying imposed by subsection (8) of section 208, in so far as that subsection applies in relation to orders under section 203.

#### *Application*

#### **205 Crown application**

- (1) The following provisions of this Act bind the Crown—
  - (a) Part 1 (public sector duty regarding socio-economic inequalities);
  - (b) Part 3 (services and public functions), so far as relating to the exercise of public functions;
  - (c) Chapter 1 of Part 11 (public sector equality duty).

- (2) Part 5 (work) binds the Crown as provided for by that Part.
- (3) The remainder of this Act applies to Crown acts as it applies to acts done by a private person.
- (4) For the purposes of subsection (3), an act is a Crown act if (and only if) it is done—
  - (a) by or on behalf of a member of the executive,
  - (b) by a statutory body acting on behalf of the Crown, or
  - (c) by or on behalf of the holder of a statutory office acting on behalf of the Crown.
- (5) A statutory body or office is a body or office established by an enactment.
- (6) The provisions of Parts 2 to 4 of the Crown Proceedings Act 1947 apply to proceedings against the Crown under this Act as they apply to proceedings in England and Wales which, as a result of section 23 of that Act, are treated for the purposes of Part 2 of that Act as civil proceedings by or against the Crown.
- (7) The provisions of Part 5 of that Act apply to proceedings against the Crown under this Act as they apply to proceedings in Scotland which, as a result of that Part, are treated as civil proceedings by or against the Crown.
- (8) But the proviso to section 44 of that Act (removal of proceedings from the sheriff to the Court of Session) does not apply to proceedings under this Act.

## 206 Information society services

Schedule 25 (information society services) has effect.

### *Subordinate legislation*

## 207 Exercise of power

- (1) A power to make an order or regulations under this Act is exercisable by a Minister of the Crown, unless there is express provision to the contrary.
- (2) Orders, regulations or rules under this Act must be made by statutory instrument.
- (3) Subsection (2) does not apply to—
  - (a) a transitional exemption order under Part 1 of Schedule 11,
  - (b) a transitional exemption order under Part 1 of Schedule 12, or
  - (c) an order under paragraph 1(3) of Schedule 14 that does not modify an enactment.
- (4) Orders or regulations under this Act—
  - (a) may make different provision for different purposes;
  - (b) may include consequential, incidental, supplementary, transitional, transitory or saving provision.
- (5) Nothing in section 163(4), 174(4) or 182(3) affects the generality of the power under subsection (4)(a).
- (6) The power under subsection (4)(b), in its application to section 37, 153, 154(2), 155(5), 197 or 216 or to paragraph 7(1) of Schedule 11 or paragraph 1(3) or 2(3)



of Schedule 14, includes power to amend an enactment (including, in the case of section 197 or 216, this Act).

- (7) In the case of section 216 (commencement), provision by virtue of subsection (4)(b) may be included in a separate order from the order that provides for the commencement to which the provision relates; and, for that purpose, it does not matter –
- (a) whether the order providing for the commencement includes provision by virtue of subsection (4)(b);
  - (b) whether the commencement has taken place.
- (8) A statutory instrument containing an Order in Council under section 82 (offshore work) is subject to annulment in pursuance of a resolution of either House of Parliament.

## **208 Ministers of the Crown, etc.**

- (1) This section applies where the power to make an order or regulations under this Act is exercisable by a Minister of the Crown or the Treasury.
- (2) A statutory instrument containing (whether alone or with other provision) an order or regulations that amend this Act or another Act of Parliament, or an Act of the Scottish Parliament or an Act or Measure of the National Assembly for Wales, is subject to the affirmative procedure.
- (3) But a statutory instrument is not subject to the affirmative procedure by virtue of subsection (2) merely because it contains –
  - (a) an order under section 59 (local authority functions);
  - (b) an order under section 151 (power to amend list of public authorities for the purposes of the public sector equality duty) that provides for the omission of an entry where the authority concerned has ceased to exist or the variation of an entry where the authority concerned has changed its name;
  - (c) an order under paragraph 1(3) of Schedule 14 (educational charities and endowments) that modifies an enactment.
- (4) A statutory instrument containing (whether alone or with other provision) an order or regulations mentioned in subsection (5) is subject to the affirmative procedure.
- (5) The orders and regulations referred to in subsection (4) are –
  - (a) regulations under section 30 (services: ships and hovercraft);
  - (b) regulations under section 78 (gender pay gap information);
  - (c) regulations under section 81 (work: ships and hovercraft);
  - (d) an order under section 105 (election candidates: expiry of provision);
  - (e) regulations under section 106 (election candidates: diversity information);
  - (f) regulations under section 153 or 154(2) (public sector equality duty: powers to impose specific duties);
  - (g) regulations under section 184(4) (rail vehicle accessibility: procedure for exemption orders);
  - (h) an order under section 203 (EU obligations: harmonisation);
  - (i) regulations under paragraph 9(3) of Schedule 20 (rail vehicle accessibility: determination of turnover for purposes of penalties).

- (6) A statutory instrument that is not subject to the affirmative procedure by virtue of subsection (2) or (4) is subject to the negative procedure.
- (7) But a statutory instrument is not subject to the negative procedure by virtue of subsection (6) merely because it contains –
  - (a) an order under section 183(1) (rail vehicle accessibility: exemptions);
  - (b) an order under section 216 (commencement) that –
    - (i) does not amend an Act of Parliament, an Act of the Scottish Parliament or an Act or Measure of the National Assembly for Wales, and
    - (ii) is not made in reliance on section 207(7).
- (8) If a statutory instrument is subject to the affirmative procedure, the order or regulations contained in it must not be made unless a draft of the instrument is laid before and approved by a resolution of each House of Parliament.
- (9) If a statutory instrument is subject to the negative procedure, it is subject to annulment in pursuance of a resolution of either House of Parliament.
- (10) If a draft of a statutory instrument containing an order or regulations under section 2, 151, 153, 154(2) or 155(5) would, apart from this subsection, be treated for the purposes of the Standing Orders of either House of Parliament as a hybrid instrument, it is to proceed in that House as if it were not a hybrid instrument.

## 209 The Welsh Ministers

- (1) This section applies where the power to make an order or regulations under this Act is exercisable by the Welsh Ministers.
- (2) A statutory instrument containing (whether alone or with other provision) an order or regulations mentioned in subsection (3) is subject to the affirmative procedure.
- (3) The orders and regulations referred to in subsection (2) are –
  - (a) regulations under section 2 (socio-economic inequalities);
  - (b) an order under section 151 (power to amend list of public authorities for the purposes of the public sector equality duty);
  - (c) regulations under section 153 or 154(2) (public sector equality duty: powers to impose specific duties);
  - (d) regulations under section 155(5) that amend an Act of Parliament or an Act or Measure of the National Assembly for Wales (public sector equality duty: power to modify or remove specific duties).
- (4) But a statutory instrument is not subject to the affirmative procedure by virtue of subsection (2) merely because it contains an order under section 151 that provides for –
  - (a) the omission of an entry where the authority concerned has ceased to exist, or
  - (b) the variation of an entry where the authority concerned has changed its name.
- (5) A statutory instrument that is not subject to the affirmative procedure by virtue of subsection (2) is subject to the negative procedure.



- (6) If a statutory instrument is subject to the affirmative procedure, the order or regulations contained in it must not be made unless a draft of the instrument is laid before and approved by a resolution of the National Assembly for Wales.
- (7) If a statutory instrument is subject to the negative procedure, it is subject to annulment in pursuance of a resolution of the National Assembly for Wales.

## 210 The Scottish Ministers

- (1) This section applies where the power to make an order, regulations or rules under this Act is exercisable by the Scottish Ministers.
- (2) A statutory instrument containing (whether alone or with other provision) an order or regulations mentioned in subsection (3) is subject to the affirmative procedure.
- (3) The orders and regulations referred to in subsection (2) are –
  - (a) regulations under section 2 (socio-economic inequalities);
  - (b) regulations under section 37 (power to make provision about adjustments to common parts in Scotland);
  - (c) an order under section 151 (power to amend list of public authorities for the purposes of the public sector equality duty);
  - (d) regulations under section 153 or 154(2) (public sector equality duty: powers to impose specific duties);
  - (e) regulations under section 155(5) that amend an Act of Parliament or an Act of the Scottish Parliament (public sector equality duty: power to modify or remove specific duties).
- (4) But a statutory instrument is not subject to the affirmative procedure by virtue of subsection (2) merely because it contains an order under section 151 that provides for –
  - (a) the omission of an entry where the authority concerned has ceased to exist, or
  - (b) the variation of an entry where the authority concerned has changed its name.
- (5) A statutory instrument that is not subject to the affirmative procedure by virtue of subsection (2) is subject to the negative procedure.
- (6) If a statutory instrument is subject to the affirmative procedure, the order or regulations contained in it must not be made unless a draft of the instrument is laid before and approved by a resolution of the Scottish Parliament.
- (7) If a statutory instrument is subject to the negative procedure, it is subject to annulment in pursuance of a resolution of the Scottish Parliament.

*Amendments, etc.*

## 211 Amendments, repeals and revocations

- (1) Schedule 26 (amendments) has effect.
- (2) Schedule 27 (repeals and revocations) has effect.

*Interpretation***212 General interpretation**

## (1) In this Act—

“armed forces” means any of the naval, military or air forces of the Crown;

“the Commission” means the Commission for Equality and Human Rights;

“detriment” does not, subject to subsection (5), include conduct which amounts to harassment;

“the Education Acts” has the meaning given in section 578 of the Education Act 1996;

“employment” and related expressions are (subject to subsection (11)) to be read with section 83;

“enactment” means an enactment contained in—

- (a) an Act of Parliament,
- (b) an Act of the Scottish Parliament,
- (c) an Act or Measure of the National Assembly for Wales, or
- (d) subordinate legislation;

“equality clause” means a sex equality clause or maternity equality clause;

“equality rule” means a sex equality rule or maternity equality rule;

“man” means a male of any age;

“maternity equality clause” has the meaning given in section 73;

“maternity equality rule” has the meaning given in section 75;

“non-discrimination rule” has the meaning given in section 61;

“occupational pension scheme” has the meaning given in section 1 of the Pension Schemes Act 1993;

“parent” has the same meaning as in—

- (a) the Education Act 1996 (in relation to England and Wales);
- (b) the Education (Scotland) Act 1980 (in relation to Scotland);

“prescribed” means prescribed by regulations;

“profession” includes a vocation or occupation;

“sex equality clause” has the meaning given in section 66;

“sex equality rule” has the meaning given in section 67;

“subordinate legislation” means—

- (a) subordinate legislation within the meaning of the Interpretation Act 1978, or
- (b) an instrument made under an Act of the Scottish Parliament or an Act or Measure of the National Assembly for Wales;

“substantial” means more than minor or trivial;

“trade” includes any business;

“woman” means a female of any age.

(2) A reference (however expressed) to an act includes a reference to an omission.

(3) A reference (however expressed) to an omission includes (unless there is express provision to the contrary) a reference to—

- (a) a deliberate omission to do something;
- (b) a refusal to do it;
- (c) a failure to do it.

- (4) A reference (however expressed) to providing or affording access to a benefit, facility or service includes a reference to facilitating access to the benefit, facility or service.
- (5) Where this Act disappplies a prohibition on harassment in relation to a specified protected characteristic, the disapplication does not prevent conduct relating to that characteristic from amounting to a detriment for the purposes of discrimination within section 13 because of that characteristic.
- (6) A reference to occupation, in relation to premises, is a reference to lawful occupation.
- (7) The following are members of the executive—
  - (a) a Minister of the Crown;
  - (b) a government department;
  - (c) the Welsh Ministers, the First Minister for Wales or the Counsel General to the Welsh Assembly Government;
  - (d) any part of the Scottish Administration.
- (8) A reference to a breach of an equality clause or rule is a reference to a breach of a term modified by, or included by virtue of, an equality clause or rule.
- (9) A reference to a contravention of this Act does not include a reference to a breach of an equality clause or rule, unless there is express provision to the contrary.
- (10) “Member”, in relation to an occupational pension scheme, means an active member, a deferred member or a pensioner member (within the meaning, in each case, given by section 124 of the Pensions Act 1995).
- (11) “Employer”, “deferred member”, “pension credit member”, “pensionable service”, “pensioner member” and “trustees or managers” each have, in relation to an occupational pension scheme, the meaning given by section 124 of the Pensions Act 1995.
- (12) A reference to the accrual of rights under an occupational pension scheme is to be construed in accordance with that section.
- (13) Nothing in section 28, 32, 84, 90, 95 or 100 is to be regarded as an express exception.

### **213 References to maternity leave, etc.**

- (1) This section applies for the purposes of this Act.
- (2) A reference to a woman on maternity leave is a reference to a woman on—
  - (a) compulsory maternity leave,
  - (b) ordinary maternity leave, or
  - (c) additional maternity leave.
- (3) A reference to a woman on compulsory maternity leave is a reference to a woman absent from work because she satisfies the conditions prescribed for the purposes of section 72(1) of the Employment Rights Act 1996.
- (4) A reference to a woman on ordinary maternity leave is a reference to a woman absent from work because she is exercising the right to ordinary maternity leave.

- (5) A reference to the right to ordinary maternity leave is a reference to the right conferred by section 71(1) of the Employment Rights Act 1996.
- (6) A reference to a woman on additional maternity leave is a reference to a woman absent from work because she is exercising the right to additional maternity leave.
- (7) A reference to the right to additional maternity leave is a reference to the right conferred by section 73(1) of the Employment Rights Act 1996.
- (8) “Additional maternity leave period” has the meaning given in section 73(2) of that Act.

## **214 Index of defined expressions**

Schedule 28 lists the places where expressions used in this Act are defined or otherwise explained.

### *Final provisions*

## **215 Money**

There is to be paid out of money provided by Parliament any increase attributable to this Act in the expenses of a Minister of the Crown.

## **216 Commencement**

- (1) The following provisions come into force on the day on which this Act is passed –
  - (a) section 186(2) (rail vehicle accessibility: compliance);
  - (b) this Part (except sections 202 (civil partnerships on religious premises), 206 (information society services) and 211 (amendments, etc)).
- (2) Part 15 (family property) comes into force on such day as the Lord Chancellor may by order appoint.
- (3) The other provisions of this Act come into force on such day as a Minister of the Crown may by order appoint.

## **217 Extent**

- (1) This Act forms part of the law of England and Wales.
- (2) This Act, apart from section 190 (improvements to let dwelling houses) and Part 15 (family property), forms part of the law of Scotland.
- (3) Each of the following also forms part of the law of Northern Ireland –
  - (a) section 82 (offshore work);
  - (b) section 105(3) and (4) (expiry of Sex Discrimination (Election Candidates) Act 2002);
  - (c) section 199 (abolition of presumption of advancement).

## **218 Short title**

This Act may be cited as the Equality Act 2010.

## SCHEDULES

## SCHEDULE 1

Section 6

## DISABILITY: SUPPLEMENTARY PROVISION

## PART 1

## DETERMINATION OF DISABILITY

*Impairment*

- 1 Regulations may make provision for a condition of a prescribed description to be, or not to be, an impairment.

*Long-term effects*

- 2 (1) The effect of an impairment is long-term if—
  - (a) it has lasted for at least 12 months,
  - (b) it is likely to last for at least 12 months, or
  - (c) it is likely to last for the rest of the life of the person affected.
- (2) If an impairment ceases to have a substantial adverse effect on a person's ability to carry out normal day-to-day activities, it is to be treated as continuing to have that effect if that effect is likely to recur.
- (3) For the purposes of sub-paragraph (2), the likelihood of an effect recurring is to be disregarded in such circumstances as may be prescribed.
- (4) Regulations may prescribe circumstances in which, despite sub-paragraph (1), an effect is to be treated as being, or as not being, long-term.

*Severe disfigurement*

- 3 (1) An impairment which consists of a severe disfigurement is to be treated as having a substantial adverse effect on the ability of the person concerned to carry out normal day-to-day activities.
- (2) Regulations may provide that in prescribed circumstances a severe disfigurement is not to be treated as having that effect.
- (3) The regulations may, in particular, make provision in relation to deliberately acquired disfigurement.

*Substantial adverse effects*

- 4 Regulations may make provision for an effect of a prescribed description on the ability of a person to carry out normal day-to-day activities to be treated as being, or as not being, a substantial adverse effect.

*Effect of medical treatment*

- 5 (1) An impairment is to be treated as having a substantial adverse effect on the ability of the person concerned to carry out normal day-to-day activities if –
- (a) measures are being taken to treat or correct it, and
  - (b) but for that, it would be likely to have that effect.
- (2) “Measures” includes, in particular, medical treatment and the use of a prosthesis or other aid.
- (3) Sub-paragraph (1) does not apply –
- (a) in relation to the impairment of a person’s sight, to the extent that the impairment is, in the person’s case, correctable by spectacles or contact lenses or in such other ways as may be prescribed;
  - (b) in relation to such other impairments as may be prescribed, in such circumstances as are prescribed.

*Certain medical conditions*

- 6 (1) Cancer, HIV infection and multiple sclerosis are each a disability.
- (2) HIV infection is infection by a virus capable of causing the Acquired Immune Deficiency Syndrome.

*Deemed disability*

- 7 (1) Regulations may provide for persons of prescribed descriptions to be treated as having disabilities.
- (2) The regulations may prescribe circumstances in which a person who has a disability is to be treated as no longer having the disability.
- (3) This paragraph does not affect the other provisions of this Schedule.

*Progressive conditions*

- 8 (1) This paragraph applies to a person (P) if –
- (a) P has a progressive condition,
  - (b) as a result of that condition P has an impairment which has (or had) an effect on P’s ability to carry out normal day-to-day activities, but
  - (c) the effect is not (or was not) a substantial adverse effect.
- (2) P is to be taken to have an impairment which has a substantial adverse effect if the condition is likely to result in P having such an impairment.
- (3) Regulations may make provision for a condition of a prescribed description to be treated as being, or as not being, progressive.

*Past disabilities*

- 9 (1) A question as to whether a person had a disability at a particular time (“the relevant time”) is to be determined, for the purposes of section 6, as if the provisions of, or made under, this Act were in force when the act complained of was done had been in force at the relevant time.
- (2) The relevant time may be a time before the coming into force of the provision of this Act to which the question relates.

## PART 2

## GUIDANCE

*Preliminary*

- 10 This Part of this Schedule applies in relation to guidance referred to in section 6(5).

*Examples*

- 11 The guidance may give examples of—
- (a) effects which it would, or would not, be reasonable, in relation to particular activities, to regard as substantial adverse effects;
  - (b) substantial adverse effects which it would, or would not, be reasonable to regard as long-term.

*Adjudicating bodies*

- 12 (1) In determining whether a person is a disabled person, an adjudicating body must take account of such guidance as it thinks is relevant.
- (2) An adjudicating body is—
- (a) a court;
  - (b) a tribunal;
  - (c) a person (other than a court or tribunal) who may decide a claim relating to a contravention of Part 6 (education).

*Representations*

- 13 Before issuing the guidance, the Minister must—
- (a) publish a draft of it;
  - (b) consider any representations made to the Minister about the draft;
  - (c) make such modifications as the Minister thinks appropriate in the light of the representations.

*Parliamentary procedure*

- 14 (1) If the Minister decides to proceed with proposed guidance, a draft of it must be laid before Parliament.
- (2) If, before the end of the 40-day period, either House resolves not to approve the draft, the Minister must take no further steps in relation to the proposed guidance.
- (3) If no such resolution is made before the end of that period, the Minister must issue the guidance in the form of the draft.
- (4) Sub-paragraph (2) does not prevent a new draft of proposed guidance being laid before Parliament.
- (5) The 40-day period—
- (a) begins on the date on which the draft is laid before both Houses (or, if laid before each House on a different date, on the later date);



- (b) does not include a period during which Parliament is prorogued or dissolved;
- (c) does not include a period during which both Houses are adjourned for more than 4 days.

*Commencement*

- 15 The guidance comes into force on the day appointed by order by the Minister.

*Revision and revocation*

- 16 (1) The Minister may –
- (a) revise the whole or part of guidance and re-issue it;
  - (b) by order revoke guidance.
- (2) A reference to guidance includes a reference to guidance which has been revised and re-issued.

SCHEDULE 2

Section 31

SERVICES AND PUBLIC FUNCTIONS: REASONABLE ADJUSTMENTS

*Preliminary*

- 1 This Schedule applies where a duty to make reasonable adjustments is imposed on A by this Part.

*The duty*

- 2 (1) A must comply with the first, second and third requirements.
- (2) For the purposes of this paragraph, the reference in section 20(3), (4) or (5) to a disabled person is to disabled persons generally.
- (3) Section 20 has effect as if, in subsection (4), for “to avoid the disadvantage” there were substituted –
- “(a) to avoid the disadvantage, or
  - (b) to adopt a reasonable alternative method of providing the service or exercising the function.”
- (4) In relation to each requirement, the relevant matter is the provision of the service, or the exercise of the function, by A.
- (5) Being placed at a substantial disadvantage in relation to the exercise of a function means –
- (a) if a benefit is or may be conferred in the exercise of the function, being placed at a substantial disadvantage in relation to the conferment of the benefit, or
  - (b) if a person is or may be subjected to a detriment in the exercise of the function, suffering an unreasonably adverse experience when being subjected to the detriment.



- (6) In relation to the second requirement, a physical feature includes a physical feature brought by or on behalf of A, in the course of providing the service or exercising the function, on to premises other than those that A occupies (as well as including a physical feature in or on premises that A occupies).
- (7) If A is a service-provider, nothing in this paragraph requires A to take a step which would fundamentally alter –
  - (a) the nature of the service, or
  - (b) the nature of A’s trade or profession.
- (8) If A exercises a public function, nothing in this paragraph requires A to take a step which A has no power to take.

*Special provision about transport*

- 3 (1) This paragraph applies where A is concerned with the provision of a service which involves transporting people by land, air or water.
- (2) It is never reasonable for A to have to take a step which would –
  - (a) involve the alteration or removal of a physical feature of a vehicle used in providing the service;
  - (b) affect whether vehicles are provided;
  - (c) affect what vehicles are provided;
  - (d) affect what happens in the vehicle while someone is travelling in it.
- (3) But, for the purpose of complying with the first or third requirement, A may not rely on sub-paragraph (2)(b), (c) or (d) if the vehicle concerned is –
  - (a) a hire-vehicle designed and constructed for the carriage of passengers, comprising more than 8 seats in addition to the driver’s seat and having a maximum mass not exceeding 5 tonnes,
  - (b) a hire-vehicle designed and constructed for the carriage of goods and having a maximum mass not exceeding 3.5 tonnes,
  - (c) a vehicle licensed under section 48 of the Local Government (Miscellaneous Provisions) Act 1976 or section 7 of the Private Hire Vehicles (London) Act 1998 (or under a provision of a local Act corresponding to either of those provisions),
  - (d) a private hire car (within the meaning of section 23 of the Civic Government (Scotland) Act 1982),
  - (e) a public service vehicle (within the meaning given by section 1 of the Public Passenger Vehicles Act 1981),
  - (f) a vehicle built or adapted to carry passengers on a railway or tramway (within the meaning, in each case, of the Transport and Works Act 1992),
  - (g) a taxi,
  - (h) a vehicle deployed to transport the driver and passengers of a vehicle that has broken down or is involved in an accident, or
  - (i) a vehicle deployed on a system using a mode of guided transport (within the meaning of the Transport and Works Act 1992).
- (4) In so far as the second requirement requires A to adopt a reasonable alternative method of providing the service to disabled persons, A may not, for the purpose of complying with the requirement, rely on sub-paragraph (2)(b), (c) or (d) if the vehicle is within sub-paragraph (3)(h).

- (5) A may not, for the purpose of complying with the first, second or third requirement rely on sub-paragraph (2) of this paragraph if A provides the service by way of a hire-vehicle built to carry no more than 8 passengers.
- (6) For the purposes of sub-paragraph (5) in its application to the second requirement, a part of a vehicle is to be regarded as a physical feature if it requires alteration in order to facilitate the provision of—
  - (a) hand controls to enable a disabled person to operate braking and accelerator systems in the vehicle, or
  - (b) facilities for the stowage of a wheelchair.
- (7) For the purposes of sub-paragraph (6)(a), fixed seating and in-built electrical systems are not physical features; and for the purposes of sub-paragraph (6)(b), fixed seating is not a physical feature.
- (8) In the case of a vehicle within sub-paragraph (3), a relevant device is not an auxiliary aid for the purposes of the third requirement.
- (9) A relevant device is a device or structure, or equipment, the installation, operation or maintenance of which would necessitate making a permanent alteration to, or which would have a permanent effect on, the internal or external fabric of the vehicle.
- (10) Regulations may amend this paragraph so as to provide for sub-paragraph (2) not to apply, or to apply only so far as is prescribed, in relation to vehicles of a prescribed description.

#### *Interpretation*

- 4 (1) This paragraph applies for the purposes of paragraph 3.
- (2) A “hire-vehicle” is a vehicle hired (by way of a trade) under a hiring agreement to which section 66 of the Road Traffic Offenders Act 1988 applies.
- (3) A “taxi”, in England and Wales, is a vehicle—
  - (a) licensed under section 37 of the Town Police Clauses Act 1847,
  - (b) licensed under section 6 of the Metropolitan Public Carriage Act 1869, or
  - (c) drawn by one or more persons or animals.
- (4) A “taxi”, in Scotland, is—
  - (a) a hire car engaged, by arrangements made in a public place between the person to be transported (or a person acting on that person’s behalf) and the driver, for a journey starting there and then, or
  - (b) a vehicle drawn by one or more persons or animals.

## SCHEDULE 3

Section 31

## SERVICES AND PUBLIC FUNCTIONS: EXCEPTIONS

## PART 1

## CONSTITUTIONAL MATTERS

*Parliament*

- 1 (1) Section 29 does not apply to the exercise of –
  - (a) a function of Parliament;
  - (b) a function exercisable in connection with proceedings in Parliament.
- (2) Sub-paragraph (1) does not permit anything to be done to or in relation to an individual unless it is done by or in pursuance of a resolution or other deliberation of either House or of a Committee of either House.

*Legislation*

- 2 (1) Section 29 does not apply to preparing, making or considering –
  - (a) an Act of Parliament;
  - (b) a Bill for an Act of Parliament;
  - (c) an Act of the Scottish Parliament;
  - (d) a Bill for an Act of the Scottish Parliament;
  - (e) an Act of the National Assembly for Wales;
  - (f) a Bill for an Act of the National Assembly for Wales.
- (2) Section 29 does not apply to preparing, making, approving or considering –
  - (a) a Measure of the National Assembly for Wales;
  - (b) a proposed Measure of the National Assembly for Wales.
- (3) Section 29 does not apply to preparing, making, confirming, approving or considering an instrument which is made under an enactment by –
  - (a) a Minister of the Crown;
  - (b) the Scottish Ministers or a member of the Scottish Executive;
  - (c) the Welsh Ministers, the First Minister for Wales or the Counsel General to the Welsh Assembly Government.
- (4) Section 29 does not apply to preparing, making, confirming, approving or considering an instrument to which paragraph 6(a) of Schedule 2 to the Synodical Government Measure 1969 (1969 No. 2) (Measures, Canons, Acts of Synod, orders, etc.) applies.
- (5) Section 29 does not apply to anything done in connection with the preparation, making, consideration, approval or confirmation of an instrument made by –
  - (a) Her Majesty in Council;
  - (b) the Privy Council.
- (6) Section 29 does not apply to anything done in connection with the imposition of a requirement or condition which comes within Schedule 22 (statutory provisions).

*Judicial functions*

- 3 (1) Section 29 does not apply to—
- (a) a judicial function;
  - (b) anything done on behalf of, or on the instructions of, a person exercising a judicial function;
  - (c) a decision not to commence or continue criminal proceedings;
  - (d) anything done for the purpose of reaching, or in pursuance of, a decision not to commence or continue criminal proceedings.
- (2) A reference in sub-paragraph (1) to a judicial function includes a reference to a judicial function conferred on a person other than a court or tribunal.

*Armed forces*

- 4 (1) Section 29(6), so far as relating to relevant discrimination, does not apply to anything done for the purpose of ensuring the combat effectiveness of the armed forces.
- (2) “Relevant discrimination” is—
- (a) age discrimination;
  - (b) disability discrimination;
  - (c) gender reassignment discrimination;
  - (d) sex discrimination.

*Security services, etc.*

- 5 Section 29 does not apply to—
- (a) the Security Service;
  - (b) the Secret Intelligence Service;
  - (c) the Government Communications Headquarters;
  - (d) a part of the armed forces which is, in accordance with a requirement of the Secretary of State, assisting the Government Communications Headquarters.

PART 2

EDUCATION

- 6 In its application to a local authority in England and Wales, section 29, so far as relating to age discrimination or religious or belief-related discrimination, does not apply to—
- (a) the exercise of the authority’s functions under section 14 of the Education Act 1996 (provision of schools);
  - (b) the exercise of its function under section 13 of that Act in so far as it relates to a function of its under section 14 of that Act.
- 7 In its application to an education authority, section 29, so far as relating to age discrimination or religious or belief-related discrimination, does not apply to—
- (a) the exercise of the authority’s functions under section 17 of the Education (Scotland) Act 1980 (provision of schools);

- 
- (b) the exercise of its functions under section 1 of that Act, section 2 of the Standards in Scotland’s Schools etc. Act 2000 (asp 6) or section 4 or 5 of the Education (Additional Support for Learning) (Scotland) Act 2004 (asp 4) (general responsibility for education) in so far as it relates to a matter specified in paragraph (a);
    - (c) the exercise of its functions under subsection (1) of section 50 of the Education (Scotland) Act 1980 (education of pupils in exceptional circumstances) in so far as it consists of making arrangements of the description referred to in subsection (2) of that section.
  - 8 (1) In its application to a local authority in England and Wales or an education authority, section 29, so far as relating to sex discrimination, does not apply to the exercise of the authority’s functions in relation to the establishment of a school.
  - (2) But nothing in sub-paragraph (1) is to be taken as disapplying section 29 in relation to the exercise of the authority’s functions under section 14 of the Education Act 1996 or section 17 of the Education (Scotland) Act 1982.
  - 9 Section 29, so far as relating to age discrimination, does not apply in relation to anything done in connection with—
    - (a) the curriculum of a school,
    - (b) admission to a school,
    - (c) transport to or from a school, or
    - (d) the establishment, alteration or closure of schools.
  - 10 (1) Section 29, so far as relating to disability discrimination, does not require a local authority in England or Wales exercising functions under the Education Acts or an education authority exercising relevant functions to remove or alter a physical feature.
  - (2) Relevant functions are functions under—
    - (a) the Education (Scotland) Act 1980,
    - (b) the Education (Scotland) Act 1996,
    - (c) the Standards in Scotland’s Schools etc. Act 2000, or
    - (d) the Education (Additional Support for Learning) (Scotland) Act 2004.
  - 11 Section 29, so far as relating to religious or belief-related discrimination, does not apply in relation to anything done in connection with—
    - (a) the curriculum of a school;
    - (b) admission to a school which has a religious ethos;
    - (c) acts of worship or other religious observance organised by or on behalf of a school (whether or not forming part of the curriculum);
    - (d) the responsible body of a school which has a religious ethos;
    - (e) transport to or from a school;
    - (f) the establishment, alteration or closure of schools.
  - 12 This Part of this Schedule is to be construed in accordance with Chapter 1 of Part 6.

## PART 3

## HEALTH AND CARE

*Blood services*

- 13 (1) A person operating a blood service does not contravene section 29 only by refusing to accept a donation of an individual's blood if—
- (a) the refusal is because of an assessment of the risk to the public, or to the individual, based on clinical, epidemiological or other data obtained from a source on which it is reasonable to rely, and
  - (b) the refusal is reasonable.
- (2) A blood service is a service for the collection and distribution of human blood for the purposes of medical services.
- (3) “Blood” includes blood components.

*Health and safety*

- 14 (1) A service-provider (A) who refuses to provide the service to a pregnant woman does not discriminate against her in contravention of section 29 because she is pregnant if—
- (a) A reasonably believes that providing her with the service would, because she is pregnant, create a risk to her health or safety,
  - (b) A refuses to provide the service to persons with other physical conditions, and
  - (c) the reason for that refusal is that A reasonably believes that providing the service to such persons would create a risk to their health or safety.
- (2) A service-provider (A) who provides, or offers to provide, the service to a pregnant woman on conditions does not discriminate against her in contravention of section 29 because she is pregnant if—
- (a) the conditions are intended to remove or reduce a risk to her health or safety,
  - (b) A reasonably believes that the provision of the service without the conditions would create a risk to her health or safety,
  - (c) A imposes conditions on the provision of the service to persons with other physical conditions, and
  - (d) the reason for the imposition of those conditions is that A reasonably believes that the provision of the service to such persons without those conditions would create a risk to their health or safety.

*Care within the family*

- 15 A person (A) does not contravene section 29 only by participating in arrangements under which (whether or not for reward) A takes into A's home, and treats as members of A's family, persons requiring particular care and attention.



## PART 4

## IMMIGRATION

*Disability*

- 16 (1) This paragraph applies in relation to disability discrimination.
- (2) Section 29 does not apply to—
- (a) a decision within sub-paragraph (3);
  - (b) anything done for the purposes of or in pursuance of a decision within that sub-paragraph.
- (3) A decision is within this sub-paragraph if it is a decision (whether or not taken in accordance with immigration rules) to do any of the following on the ground that doing so is necessary for the public good—
- (a) to refuse entry clearance;
  - (b) to refuse leave to enter or remain in the United Kingdom;
  - (c) to cancel leave to enter or remain in the United Kingdom;
  - (d) to vary leave to enter or remain in the United Kingdom;
  - (e) to refuse an application to vary leave to enter or remain in the United Kingdom.
- (4) Section 29 does not apply to—
- (a) a decision taken, or guidance given, by the Secretary of State in connection with a decision within sub-paragraph (3);
  - (b) a decision taken in accordance with guidance given by the Secretary of State in connection with a decision within that sub-paragraph.

*Nationality and ethnic or national origins*

- 17 (1) This paragraph applies in relation to race discrimination so far as relating to—
- (a) nationality, or
  - (b) ethnic or national origins.
- (2) Section 29 does not apply to anything done by a relevant person in the exercise of functions exercisable by virtue of a relevant enactment.
- (3) A relevant person is—
- (a) a Minister of the Crown acting personally, or
  - (b) a person acting in accordance with a relevant authorisation.
- (4) A relevant authorisation is a requirement imposed or express authorisation given—
- (a) with respect to a particular case or class of case, by a Minister of the Crown acting personally;
  - (b) with respect to a particular class of case, by a relevant enactment or by an instrument made under or by virtue of a relevant enactment.
- (5) The relevant enactments are—
- (a) the Immigration Acts,
  - (b) the Special Immigration Appeals Commission Act 1997,

- (c) a provision made under section 2(2) of the European Communities Act 1972 which relates to immigration or asylum, and
  - (d) a provision of Community law which relates to immigration or asylum.
- (6) The reference in sub-paragraph (5)(a) to the Immigration Acts does not include a reference to—
- (a) sections 28A to 28K of the Immigration Act 1971 (powers of arrest, entry and search, etc.), or
  - (b) section 14 of the Asylum and Immigration (Treatment of Claimants, etc.) Act 2004 (power of arrest).

*Religion or belief*

- 18 (1) This paragraph applies in relation to religious or belief-related discrimination.
- (2) Section 29 does not apply to a decision within sub-paragraph (3) or anything done for the purposes of or in pursuance of a decision within that sub-paragraph.
- (3) A decision is within this sub-paragraph if it is a decision taken in accordance with immigration rules—
- (a) to refuse entry clearance or leave to enter the United Kingdom, or to cancel leave to enter or remain in the United Kingdom, on the grounds that the exclusion of the person from the United Kingdom is conducive to the public good, or
  - (b) to vary leave to enter or remain in the United Kingdom, or to refuse an application to vary leave to enter or remain in the United Kingdom, on the grounds that it is undesirable to permit the person to remain in the United Kingdom.
- (4) Section 29 does not apply to a decision within sub-paragraph (5), or anything done for the purposes of or in pursuance of a decision within that sub-paragraph, if the decision is taken on grounds mentioned in sub-paragraph (6).
- (5) A decision is within this sub-paragraph if it is a decision (whether or not taken in accordance with immigration rules) in connection with an application for entry clearance or for leave to enter or remain in the United Kingdom.
- (6) The grounds referred to in sub-paragraph (4) are—
- (a) the grounds that a person holds an office or post in connection with a religion or belief or provides a service in connection with a religion or belief,
  - (b) the grounds that a religion or belief is not to be treated in the same way as certain other religions or beliefs, or
  - (c) the grounds that the exclusion from the United Kingdom of a person to whom paragraph (a) applies is conducive to the public good.
- (7) Section 29 does not apply to—
- (a) a decision taken, or guidance given, by the Secretary of State in connection with a decision within sub-paragraph (3) or (5);



- (b) a decision taken in accordance with guidance given by the Secretary of State in connection with a decision within either of those sub-paragraphs.

*Interpretation*

- 19 A reference to entry clearance, leave to enter or remain or immigration rules is to be construed in accordance with the Immigration Act 1971.

PART 5

INSURANCE, ETC.

*Services arranged by employer*

- 20 (1) Section 29 does not apply to the provision of a relevant financial service if the provision is in pursuance of arrangements made by an employer for the service-provider to provide the service to the employer's employees, and other persons, as a consequence of the employment.
- (2) "Relevant financial service" means –
- (a) insurance or a related financial service, or
  - (b) a service relating to membership of or benefits under a personal pension scheme (within the meaning given by section 1 of the Pension Schemes Act 1993).

*Disability*

- 21 (1) It is not a contravention of section 29, so far as relating to disability discrimination, to do anything in connection with insurance business if –
- (a) that thing is done by reference to information that is both relevant to the assessment of the risk to be insured and from a source on which it is reasonable to rely, and
  - (b) it is reasonable to do that thing.
- (2) "Insurance business" means business which consists of effecting or carrying out contracts of insurance; and that definition is to be read with –
- (a) section 22 of the Financial Services and Markets Act 2000,
  - (b) any relevant order under that Act, and
  - (c) Schedule 2 to that Act.

*Sex, gender reassignment, pregnancy and maternity*

- 22 (1) It is not a contravention of section 29, so far as relating to relevant discrimination, to do anything in relation to an annuity, life insurance policy, accident insurance policy or similar matter involving the assessment of risk if –
- (a) that thing is done by reference to actuarial or other data from a source on which it is reasonable to rely, and
  - (b) it is reasonable to do that thing.
- (2) In the case of a contract of insurance, or a contract for related financial services, entered into before 6 April 2008, sub-paragraph (1) applies only in relation to differences in premiums and benefits that are applicable to a person under the contract.

- (3) In the case of a contract of insurance, or a contract for related financial services, entered into on or after 6 April 2008, sub-paragraph (1) applies only in relation to differences in premiums and benefits if –
- (a) the use of sex as a factor in the assessment of risk is based on relevant and accurate actuarial and statistical data,
  - (b) the data are compiled, published (whether in full or in summary form) and regularly updated in accordance with guidance issued by the Treasury,
  - (c) the differences are proportionate having regard to the data, and
  - (d) the differences do not result from costs related to pregnancy or to a woman's having given birth in the period of 26 weeks ending on the day on which the thing in question is done.
- (4) "Relevant discrimination" is –
- (a) gender reassignment discrimination;
  - (b) pregnancy and maternity discrimination;
  - (c) sex discrimination.
- (5) For the purposes of the application of sub-paragraph (3) to gender reassignment discrimination by virtue of section 13, that section has effect as if in subsection (1), after "others" there were inserted "of B's sex".
- (6) In the application of sub-paragraph (3) to a contract entered into before 22 December 2008, paragraph (d) is to be ignored.

*Existing insurance policies*

- 23 (1) It is not a contravention of section 29, so far as relating to relevant discrimination, to do anything in connection with insurance business in relation to an existing insurance policy.
- (2) "Relevant discrimination" is –
- (a) age discrimination;
  - (b) disability discrimination;
  - (c) gender reassignment discrimination;
  - (d) pregnancy and maternity discrimination;
  - (e) race discrimination;
  - (f) religious or belief-related discrimination;
  - (g) sex discrimination;
  - (h) sexual orientation discrimination.
- (3) An existing insurance policy is a policy of insurance entered into before the date on which this paragraph comes into force.
- (4) Sub-paragraph (1) does not apply where an existing insurance policy was renewed, or the terms of such a policy were reviewed, on or after the date on which this paragraph comes into force.
- (5) A review of an existing insurance policy which was part of, or incidental to, a general reassessment by the service-provider of the pricing structure for a group of policies is not a review for the purposes of sub-paragraph (4).
- (6) "Insurance business" has the meaning given in paragraph 21.

## PART 6

## MARRIAGE

*Gender reassignment: England and Wales*

- 24 (1) A person does not contravene section 29, so far as relating to gender reassignment discrimination, only because of anything done in reliance on section 5B of the Marriage Act 1949 (solemnisation of marriages involving person of acquired gender).
- (2) A person (A) whose consent to the solemnisation of the marriage of a person (B) is required under section 44(1) of the Marriage Act 1949 (solemnisation in registered building) does not contravene section 29, so far as relating to gender reassignment discrimination, by refusing to consent if A reasonably believes that B's gender has become the acquired gender under the Gender Recognition Act 2004.
- (3) Sub-paragraph (4) applies to a person (A) who may, in a case that comes within the Marriage Act 1949 (other than the case mentioned in sub-paragraph (1)), solemnise marriages according to a form, rite or ceremony of a body of persons who meet for religious worship.
- (4) A does not contravene section 29, so far as relating to gender reassignment discrimination, by refusing to solemnise, in accordance with a form, rite or ceremony as described in sub-paragraph (3), the marriage of a person (B) if A reasonably believes that B's gender has become the acquired gender under the Gender Recognition Act 2004.

*Gender reassignment: Scotland*

- 25 (1) An approved celebrant (A) does not contravene section 29, so far as relating to gender reassignment discrimination, only by refusing to solemnise the marriage of a person (B) if A reasonably believes that B's gender has become the acquired gender under the Gender Recognition Act 2004.
- (2) In sub-paragraph (1) "approved celebrant" has the meaning given in section 8(2)(a) of the Marriage (Scotland) Act 1977 (persons who may solemnise marriage).

## PART 7

## SEPARATE AND SINGLE SERVICES

*Separate services for the sexes*

- 26 (1) A person does not contravene section 29, so far as relating to sex discrimination, by providing separate services for persons of each sex if—
- (a) a joint service for persons of both sexes would be less effective, and
  - (b) the limited provision is a proportionate means of achieving a legitimate aim.
- (2) A person does not contravene section 29, so far as relating to sex discrimination, by providing separate services differently for persons of each sex if—
- (a) a joint service for persons of both sexes would be less effective,

- (b) the extent to which the service is required by one sex makes it not reasonably practicable to provide the service otherwise than as a separate service provided differently for each sex, and
  - (c) the limited provision is a proportionate means of achieving a legitimate aim.
- (3) This paragraph applies to a person exercising a public function in relation to the provision of a service as it applies to the person providing the service.

*Single-sex services*

- 27 (1) A person does not contravene section 29, so far as relating to sex discrimination, by providing a service only to persons of one sex if—
- (a) any of the conditions in sub-paragraphs (2) to (7) is satisfied, and
  - (b) the limited provision is a proportionate means of achieving a legitimate aim.
- (2) The condition is that only persons of that sex have need of the service.
- (3) The condition is that—
- (a) the service is also provided jointly for persons of both sexes, and
  - (b) the service would be insufficiently effective were it only to be provided jointly.
- (4) The condition is that—
- (a) a joint service for persons of both sexes would be less effective, and
  - (b) the extent to which the service is required by persons of each sex makes it not reasonably practicable to provide separate services.
- (5) The condition is that the service is provided at a place which is, or is part of—
- (a) a hospital, or
  - (b) another establishment for persons requiring special care, supervision or attention.
- (6) The condition is that—
- (a) the service is provided for, or is likely to be used by, two or more persons at the same time, and
  - (b) the circumstances are such that a person of one sex might reasonably object to the presence of a person of the opposite sex.
- (7) The condition is that—
- (a) there is likely to be physical contact between a person (A) to whom the service is provided and another person (B), and
  - (b) B might reasonably object if A were not of the same sex as B.
- (8) This paragraph applies to a person exercising a public function in relation to the provision of a service as it applies to the person providing the service.

*Gender reassignment*

- 28 (1) A person does not contravene section 29, so far as relating to gender reassignment discrimination, only because of anything done in relation to a matter within sub-paragraph (2) if the conduct in question is a proportionate means of achieving a legitimate aim.

- (2) The matters are—
- (a) the provision of separate services for persons of each sex;
  - (b) the provision of separate services differently for persons of each sex;
  - (c) the provision of a service only to persons of one sex.

*Services relating to religion*

- 29 (1) A minister does not contravene section 29, so far as relating to sex discrimination, by providing a service only to persons of one sex or separate services for persons of each sex, if—
- (a) the service is provided for the purposes of an organised religion,
  - (b) it is provided at a place which is (permanently or for the time being) occupied or used for those purposes, and
  - (c) the limited provision of the service is necessary in order to comply with the doctrines of the religion or is for the purpose of avoiding conflict with the strongly held religious convictions of a significant number of the religion's followers.
- (2) The reference to a minister is a reference to a minister of religion, or other person, who—
- (a) performs functions in connection with the religion, and
  - (b) holds an office or appointment in, or is accredited, approved or recognised for purposes of, a relevant organisation in relation to the religion.
- (3) An organisation is a relevant organisation in relation to a religion if its purpose is—
- (a) to practise the religion,
  - (b) to advance the religion,
  - (c) to teach the practice or principles of the religion,
  - (d) to enable persons of the religion to receive benefits, or to engage in activities, within the framework of that religion, or
  - (e) to foster or maintain good relations between persons of different religions.
- (4) But an organisation is not a relevant organisation in relation to a religion if its sole or main purpose is commercial.

*Services generally provided only for persons who share a protected characteristic*

- 30 If a service is generally provided only for persons who share a protected characteristic, a person (A) who normally provides the service for persons who share that characteristic does not contravene section 29(1) or (2)—
- (a) by insisting on providing the service in the way A normally provides it, or
  - (b) if A reasonably thinks it is impracticable to provide the service to persons who do not share that characteristic, by refusing to provide the service.

## PART 8

## TELEVISION, RADIO AND ON-LINE BROADCASTING AND DISTRIBUTION

- 31 (1) Section 29 does not apply to the provision of a content service (within the meaning given by section 32(7) of the Communications Act 2003).
- (2) Sub-paragraph (1) does not apply to the provision of an electronic communications network, electronic communications service or associated facility (each of which has the same meaning as in that Act).

## PART 9

## TRANSPORT

*Application to disability*

- 32 This Part of this Schedule applies in relation to disability discrimination.

*Transport by air*

- 33 (1) Section 29 does not apply to—
- (a) transporting people by air;
  - (b) a service provided on a vehicle for transporting people by air.
- (2) Section 29 does not apply to anything governed by Regulation (EC) No 1107/2006 of the European Parliament and of the Council of 5 July 2006 concerning the rights of disabled persons and persons with reduced mobility when travelling by air.

*Transport by land*

- 34 (1) Section 29 does not apply to transporting people by land, unless the vehicle concerned is—
- (a) a hire-vehicle designed and constructed for the carriage of passengers and comprising no more than 8 seats in addition to the driver's seat,
  - (b) a hire-vehicle designed and constructed for the carriage of passengers, comprising more than 8 seats in addition to the driver's seat and having a maximum mass not exceeding 5 tonnes,
  - (c) a hire-vehicle designed and constructed for the carriage of goods and having a maximum mass not exceeding 3.5 tonnes,
  - (d) a vehicle licensed under section 48 of the Local Government (Miscellaneous Provisions) Act 1976 or section 7 of the Private Hire Vehicles (London) Act 1998 (or under a provision of a local Act corresponding to either of those provisions),
  - (e) a private hire car (within the meaning of section 23 of the Civic Government (Scotland) Act 1982),
  - (f) a public service vehicle (within the meaning given by section 1 of the Public Passenger Vehicles Act 1981),
  - (g) a vehicle built or adapted to carry passengers on a railway or tramway (within the meaning, in each case, of the Transport and Works Act 1992),
  - (h) a taxi,



- (i) a vehicle deployed to transport the driver and passengers of a vehicle that has broken down or is involved in an accident, or
  - (j) a vehicle deployed on a system using a mode of guided transport (within the meaning of the Transport and Works Act 1992).
- (2) Paragraph 4 of Schedule 2 applies for the purposes of this paragraph as it applies for the purposes of paragraph 3 of that Schedule.

## PART 10

## SUPPLEMENTARY

*Power to amend*

- 35 (1) A Minister of the Crown may by order amend this Schedule –
- (a) so as to add, vary or omit an exception to section 29, so far as relating to disability, religion or belief or sexual orientation;
  - (b) so as to add, vary or omit an exception to section 29(6), so far as relating to gender reassignment, pregnancy and maternity, race or sex.
- (2) But provision by virtue of sub-paragraph (1) may not amend this Schedule –
- (a) so as to omit an exception in paragraph 1, 2 or 3;
  - (b) so as to reduce the extent to which an exception in paragraph 1, 2 or 3 applies.
- (3) For the purposes of an order under sub-paragraph (1)(a), so far as relating to disability, which makes provision in relation to transport by air, it does not matter whether the transport is within or outside the United Kingdom.
- (4) Before making an order under this paragraph the Minister must consult the Commission.
- (5) Nothing in this paragraph affects the application of any other provision of this Act to conduct outside England and Wales or Scotland.

## SCHEDULE 4

Section 38

## PREMISES: REASONABLE ADJUSTMENTS

*Preliminary*

- 1 This Schedule applies where a duty to make reasonable adjustments is imposed on A by this Part.

*The duty in relation to let premises*

- 2 (1) This paragraph applies where A is a controller of let premises.
- (2) A must comply with the first and third requirements.
- (3) For the purposes of this paragraph, the reference in section 20(3) to a provision, criterion or practice of A's includes a reference to a term of the letting.

- (4) For those purposes, the reference in section 20(3) or (5) to a disabled person is a reference to a disabled person who –
  - (a) is a tenant of the premises, or
  - (b) is otherwise entitled to occupy them.
- (5) In relation to each requirement, the relevant matters are –
  - (a) the enjoyment of the premises;
  - (b) the use of a benefit or facility, entitlement to which arises as a result of the letting.
- (6) Sub-paragraph (2) applies only if A receives a request from or on behalf of the tenant or a person entitled to occupy the premises to take steps to avoid the disadvantage or provide the auxiliary aid.
- (7) If a term of the letting that prohibits the tenant from making alterations puts the disabled person at the disadvantage referred to in the first requirement, A is required to change the term only so far as is necessary to enable the tenant to make alterations to the let premises so as to avoid the disadvantage.
- (8) It is never reasonable for A to have to take a step which would involve the removal or alteration of a physical feature.
- (9) For the purposes of this paragraph, physical features do not include furniture, furnishings, materials, equipment or other chattels in or on the premises; and none of the following is an alteration of a physical feature –
  - (a) the replacement or provision of a sign or notice;
  - (b) the replacement of a tap or door handle;
  - (c) the replacement, provision or adaptation of a door bell or door entry system;
  - (d) changes to the colour of a wall, door or any other surface.
- (10) The terms of a letting include the terms of an agreement relating to it.

*The duty in relation to premises to let*

- 3 (1) This paragraph applies where A is a controller of premises to let.
- (2) A must comply with the first and third requirements.
- (3) For the purposes of this paragraph, the reference in section 20(3) or (5) to a disabled person is a reference to a disabled person who is considering taking a letting of the premises.
- (4) In relation to each requirement, the relevant matter is becoming a tenant of the premises.
- (5) Sub-paragraph (2) applies only if A receives a request by or on behalf of a disabled person within sub-paragraph (3) for A to take steps to avoid the disadvantage or provide the auxiliary aid.
- (6) Nothing in this paragraph requires A to take a step which would involve the removal or alteration of a physical feature.
- (7) Sub-paragraph (9) of paragraph 2 applies for the purposes of this paragraph as it applies for the purposes of that paragraph.



*The duty in relation to commonhold units*

- 4 (1) This paragraph applies where A is a commonhold association; and the reference to a commonhold association is a reference to the association in its capacity as the person who manages a commonhold unit.
- (2) A must comply with the first and third requirements.
- (3) For the purposes of this paragraph, the reference in section 20(3) to a provision, criterion or practice of A's includes a reference to—
- (a) a term of the commonhold community statement, or
  - (b) any other term applicable by virtue of the transfer of the unit to the unit-holder.
- (4) For those purposes, the reference in section 20(3) or (5) to a disabled person is a reference to a disabled person who—
- (a) is the unit-holder, or
  - (b) is otherwise entitled to occupy the unit.
- (5) In relation to each requirement, the relevant matters are—
- (a) the enjoyment of the unit;
  - (b) the use of a benefit or facility, entitlement to which arises as a result of a term within sub-paragraph (3)(a) or (b).
- (6) Sub-paragraph (2) applies only if A receives a request from or on behalf of the unit-holder or a person entitled to occupy the unit to take steps to avoid the disadvantage or provide the auxiliary aid.
- (7) If a term within sub-paragraph (3)(a) or (b) that prohibits the unit-holder from making alterations puts the disabled person at the disadvantage referred to in the first requirement, A is required to change the term only so far as is necessary to enable the unit-holder to make alterations to the unit so as to avoid the disadvantage.
- (8) It is never reasonable for A to have to take a step which would involve the removal or alteration of a physical feature; and sub-paragraph (9) of paragraph 2 applies in relation to a commonhold unit as it applies in relation to let premises.

*The duty in relation to common parts*

- 5 (1) This paragraph applies where A is a responsible person in relation to common parts.
- (2) A must comply with the second requirement.
- (3) For the purposes of this paragraph, the reference in section 20(4) to a physical feature is a reference to a physical feature of the common parts.
- (4) For those purposes, the reference in section 20(4) to a disabled person is a reference to a disabled person who—
- (a) is a tenant of the premises,
  - (b) is a unit-holder, or
  - (c) is otherwise entitled to occupy the premises,
- and uses or intends to use the premises as the person's only or main home.

- (5) In relation to the second requirement, the relevant matter is the use of the common parts.
- (6) Sub-paragraph (2) applies only if –
  - (a) A receives a request by or on behalf of a disabled person within sub-paragraph (4) for A to take steps to avoid the disadvantage, and
  - (b) the steps requested are likely to avoid or reduce the disadvantage.

*Consultation on adjustments relating to common parts*

- 6 (1) In deciding whether it is reasonable to take a step for the purposes of paragraph 5, A must consult all persons A thinks would be affected by the step.
- (2) The consultation must be carried out within a reasonable period of the request being made.
- (3) A is not required to have regard to a view expressed against taking a step in so far as A reasonably believes that the view is expressed because of the disabled person's disability.
- (4) Nothing in this paragraph affects anything a commonhold association is required to do pursuant to Part 1 of the Commonhold and Leasehold Reform Act 2002.

*Agreement on adjustments relating to common parts*

- 7 (1) If A decides that it is reasonable to take a step for the purposes of paragraph 5, A and the disabled person must agree in writing the rights and responsibilities of each of them in relation to the step.
- (2) An agreement under this paragraph must, in particular, make provision as to the responsibilities of the parties in relation to –
  - (a) the costs of any work to be undertaken;
  - (b) other costs arising from the work;
  - (c) the restoration of the common parts to their former condition if the relevant disabled person stops living in the premises.
- (3) It is always reasonable before the agreement is made for A to insist that the agreement should require the disabled person to pay –
  - (a) the costs referred to in paragraphs (a) and (b) of sub-paragraph (2), and
  - (b) the costs of the restoration referred to in paragraph (c) of that sub-paragraph.
- (4) If an agreement under this paragraph is made, A's obligations under the agreement become part of A's interest in the common parts and pass on subsequent disposals accordingly.
- (5) Regulations may require a party to an agreement under this paragraph to provide, in prescribed circumstances, prescribed information about the agreement to persons of a prescribed description.
- (6) The regulations may require the information to be provided in a prescribed form.

- (7) Regulations may make provision as to circumstances in which an agreement under this paragraph is to cease to have effect, in so far as the agreement does not itself make provision for termination.

*Victimisation*

- 8 (1) This paragraph applies where the relevant disabled person comes within paragraph 2(4)(b), 4(4)(b) or 5(4)(c).
- (2) A must not, because of costs incurred in connection with taking steps to comply with a requirement imposed for the purposes of paragraph 2, 4 or 5, subject to a detriment –
- (a) a tenant of the premises, or
  - (b) the unit-holder.

*Regulations*

- 9 (1) This paragraph applies for the purposes of section 36 and this Schedule.
- (2) Regulations may make provision as to –
- (a) circumstances in which premises are to be treated as let, or as not let, to a person;
  - (b) circumstances in which premises are to be treated as being, or as not being, to let;
  - (c) who is to be treated as being, or as not being, a person entitled to occupy premises otherwise than as tenant or unit-holder;
  - (d) who is to be treated as being, or as not being, a person by whom premises are let;
  - (e) who is to be treated as having, or as not having, premises to let;
  - (f) who is to be treated as being, or as not being, a manager of premises.
- (3) Provision made by virtue of this paragraph may amend this Schedule.

## SCHEDULE 5

Section 38

## PREMISES: EXCEPTIONS

*Owner-occupier*

- 1 (1) This paragraph applies to the private disposal of premises by an owner-occupier.
- (2) A disposal is a private disposal only if the owner-occupier does not –
- (a) use the services of an estate agent for the purpose of disposing of the premises, or
  - (b) publish (or cause to be published) an advertisement in connection with their disposal.
- (3) Section 33(1) applies only in so far as it relates to race.
- (4) Section 34(1) does not apply in so far as it relates to –
- (a) religion or belief, or
  - (b) sexual orientation.

- (5) In this paragraph –  
“estate agent” means a person who, by way of profession or trade, provides services for the purpose of –  
(a) finding premises for persons seeking them, or  
(b) assisting in the disposal of premises;  
“owner-occupier” means a person who –  
(a) owns an estate or interest in premises, and  
(b) occupies the whole of them.
- 2 (1) Section 36(1)(a) does not apply if –  
(a) the premises are, or have been, the only or main home of a person by whom they are let, and  
(b) since entering into the letting, neither that person nor any other by whom they are let has used a manager for managing the premises.
- (2) A manager is a person who, by profession or trade, manages let premises.
- (3) Section 36(1)(b) does not apply if –  
(a) the premises are, or have been, the only or main home of a person who has them to let, and  
(b) neither that person nor any other who has the premises to let uses the services of an estate agent for letting the premises.
- (4) “Estate agent” has the meaning given in paragraph 1.

*Small premises*

- 3 (1) This paragraph applies to anything done by a person in relation to the disposal, occupation or management of part of small premises if –  
(a) the person or a relative of that person resides, and intends to continue to reside, in another part of the premises, and  
(b) the premises include parts (other than storage areas and means of access) shared with residents of the premises who are not members of the same household as the resident mentioned in paragraph (a).
- (2) Sections 33(1), 34(1) and 35(1) apply only in so far as they relate to race.
- (3) Premises are small if –  
(a) the only other persons occupying the accommodation occupied by the resident mentioned in sub-paragraph (1)(a) are members of the same household,  
(b) the premises also include accommodation for at least one other household,  
(c) the accommodation for each of those other households is let, or available for letting, on a separate tenancy or similar agreement, and  
(d) the premises are not normally sufficient to accommodate more than two other households.
- (4) Premises are also small if they are not normally sufficient to provide residential accommodation for more than six persons (in addition to the resident mentioned in sub-paragraph (1)(a) and members of the same household).
- (5) In this paragraph, “relative” means –  
(a) spouse or civil partner,

- (b) unmarried partner,
  - (c) parent or grandparent,
  - (d) child or grandchild (whether or not legitimate),
  - (e) the spouse, civil partner or unmarried partner of a child or grandchild,
  - (f) brother or sister (whether of full blood or half-blood), or
  - (g) a relative within paragraph (c), (d), (e) or (f) whose relationship arises as a result of marriage or civil partnership.
- (6) In sub-paragraph (5), a reference to an unmarried partner is a reference to the other member of a couple consisting of—
- (a) a man and a woman who are not married to each other but are living together as husband and wife, or
  - (b) two people of the same sex who are not civil partners of each other but are living together as if they were.
- 4 (1) Section 36(1) does not apply if—
- (a) the premises in question are small premises,
  - (b) the relevant person or a relative of that person resides, and intends to continue to reside, in another part of the premises, and
  - (c) the premises include parts (other than storage areas and means of access) shared with residents of the premises who are not members of the same household as the resident mentioned in paragraph (b).
- (2) The relevant person is the person who, for the purposes of section 36(1), is—
- (a) the controller of the premises, or
  - (b) the responsible person in relation to the common parts to which the premises relate.
- (3) “Small premises” and “relative” have the same meaning as in paragraph 3.
- 5 A Minister of the Crown may by order amend paragraph 3 or 4.

## SCHEDULE 6

Section 52

## OFFICE-HOLDERS: EXCLUDED OFFICES

*Work to which other provisions apply*

- 1 (1) An office or post is not a personal or public office in so far as one or more of the provisions mentioned in sub-paragraph (2)—
- (a) applies in relation to the office or post, or
  - (b) would apply in relation to the office or post but for the operation of some other provision of this Act.
- (2) Those provisions are—
- (a) section 39 (employment);
  - (b) section 41 (contract work);
  - (c) section 44 (partnerships).
  - (d) section 45 (LLPs);
  - (e) section 47 (barristers);
  - (f) section 48 (advocates);

- (g) section 55 (employment services) so far as applying to the provision of work experience within section 56(2)(a) or arrangements within section 56(2)(c) for such provision.

*Political offices*

- 2 (1) An office or post is not a personal or public office if it is a political office.  
(2) A political office is an office or post set out in the second column of the following Table—

<i>Political setting</i>	<i>Office or post</i>
Houses of Parliament	<p>An office of the House of Commons held by a member of that House</p> <p>An office of the House of Lords held by a member of that House</p> <p>A Ministerial office within the meaning of section 2 of the House of Commons Disqualification Act 1975</p> <p>The office of the Leader of the Opposition within the meaning of the Ministerial and other Salaries Act 1975</p> <p>The office of the Chief Opposition Whip, or of an Assistant Opposition Whip, within the meaning of that Act</p>
Scottish Parliament	<p>An office of the Scottish Parliament held by a member of the Parliament</p> <p>The office of a member of the Scottish Executive</p> <p>The office of a junior Scottish Minister</p>
National Assembly for Wales	<p>An office of the National Assembly for Wales held by a member of the Assembly</p> <p>The office of a member of the Welsh Assembly Government</p>
Local government in England (outside London)	<p>An office of a county council, district council or parish council in England held by a member of the council</p> <p>An office of the Council of the Isles of Scilly held by a member of the Council</p>
Local government in London	<p>An office of the Greater London Authority held by the Mayor of London or a member of the London Assembly</p>

<i>Political setting</i>	<i>Office or post</i>
	An office of a London borough council held by a member of the council
	An office of the Common Council of the City of London held by a member of the Council
Local government in Wales	An office of a county council, county borough council or community council in Wales held by a member of the council
Local government in Scotland	An office of a council constituted under section 2 of the Local Government etc. (Scotland) Act 1994 held by a member of the council
	An office of a council established under section 51 of the Local Government (Scotland) Act 1973 held by a member of the council
Political parties	An office of a registered political party

- (3) The reference to a registered political party is a reference to a party registered in the Great Britain register under Part 2 of the Political Parties, Elections and Referendums Act 2000.

*Honours etc.*

- 3 A life peerage (within the meaning of the Life Peerages Act 1958), or any other dignity or honour conferred by the Crown, is not a personal or public office.

## SCHEDULE 7

Section 80

### EQUALITY OF TERMS: EXCEPTIONS

#### PART 1

#### TERMS OF WORK

*Compliance with laws regulating employment of women, etc.*

- 1 Neither a sex equality clause nor a maternity equality clause has effect in relation to terms of work affected by compliance with laws regulating –
- (a) the employment of women;
  - (b) the appointment of women to personal or public offices.



*Pregnancy, etc.*

- 2 A sex equality clause does not have effect in relation to terms of work affording special treatment to women in connection with pregnancy or childbirth.

## PART 2

## OCCUPATIONAL PENSION SCHEMES

*Preliminary*

- 3 (1) A sex equality rule does not have effect in relation to a difference as between men and women in the effect of a relevant matter if the difference is permitted by or by virtue of this Part of this Schedule.
- (2) “Relevant matter” has the meaning given in section 67.

*State retirement pensions*

- 4 (1) This paragraph applies where a man and a woman are eligible, in such circumstances as may be prescribed, to receive different amounts by way of pension.
- (2) The difference is permitted if, in prescribed circumstances, it is attributable only to differences between men and women in the retirement benefits to which, in prescribed circumstances, the man and woman are or would be entitled.
- (3) “Retirement benefits” are benefits under sections 43 to 55 of the Social Security Contributions and Benefits Act 1992 (state retirement pensions).

*Actuarial factors*

- 5 (1) A difference as between men and women is permitted if it consists of applying to the calculation of the employer’s contributions to an occupational pension scheme actuarial factors which—
- (a) differ for men and women, and
  - (b) are of such description as may be prescribed.
- (2) A difference as between men and women is permitted if it consists of applying to the determination of benefits of such description as may be prescribed actuarial factors which differ for men and women.

*Power to amend*

- 6 (1) Regulations may amend this Part of this Schedule so as to add, vary or omit provision about cases where a difference as between men and women in the effect of a relevant matter is permitted.
- (2) The regulations may make provision about pensionable service before the date on which they come into force (but not about pensionable service before 17 May 1990).



## SCHEDULE 8

Section 83

## WORK: REASONABLE ADJUSTMENTS

## PART 1

## INTRODUCTORY

*Preliminary*

- 1 This Schedule applies where a duty to make reasonable adjustments is imposed on A by this Part of this Act.

*The duty*

- 2 (1) A must comply with the first, second and third requirements.
- (2) For the purposes of this paragraph—
- (a) the reference in section 20(3) to a provision, criterion or practice is a reference to a provision, criterion or practice applied by or on behalf of A;
  - (b) the reference in section 20(4) to a physical feature is a reference to a physical feature of premises occupied by A;
  - (c) the reference in section 20(3), (4) or (5) to a disabled person is to an interested disabled person.
- (3) In relation to the first and third requirements, a relevant matter is any matter specified in the first column of the applicable table in Part 2 of this Schedule.
- (4) In relation to the second requirement, a relevant matter is—
- (a) a matter specified in the second entry of the first column of the applicable table in Part 2 of this Schedule, or
  - (b) where there is only one entry in a column, a matter specified there.
- (5) If two or more persons are subject to a duty to make reasonable adjustments in relation to the same interested disabled person, each of them must comply with the duty so far as it is reasonable for each of them to do so.
- 3 (1) This paragraph applies if a duty to make reasonable adjustments is imposed on A by section 55 (except where the employment service which A provides is the provision of vocational training within the meaning given by section 56(6)(b)).
- (2) The reference in section 20(3), (4) and (5) to a disabled person is a reference to an interested disabled person.
- (3) In relation to each requirement, the relevant matter is the employment service which A provides.
- (4) Sub-paragraph (5) of paragraph 2 applies for the purposes of this paragraph as it applies for the purposes of that paragraph.

## PART 2

## INTERESTED DISABLED PERSON

*Preliminary*

- 4 An interested disabled person is a disabled person who, in relation to a relevant matter, is of a description specified in the second column of the applicable table in this Part of this Schedule.

*Employers (see section 39)*

- 5 (1) This paragraph applies where A is an employer.

<i>Relevant matter</i>	<i>Description of disabled person</i>
Deciding to whom to offer employment.	A person who is, or has notified A that the person may be, an applicant for the employment.
Employment by A.	An applicant for employment by A. An employee of A's.

- (2) Where A is the employer of a disabled contract worker (B), A must comply with the first, second and third requirements on each occasion when B is supplied to a principal to do contract work.
- (3) In relation to the first requirement (as it applies for the purposes of sub-paragraph (2))—
- (a) the reference in section 20(3) to a provision, criterion or practice is a reference to a provision, criterion or practice applied by or on behalf of all or most of the principals to whom B is or might be supplied,
  - (b) the reference to being put at a substantial disadvantage is a reference to being likely to be put at a substantial disadvantage that is the same or similar in the case of each of the principals referred to in paragraph (a), and
  - (c) the requirement imposed on A is a requirement to take such steps as it would be reasonable for A to have to take if the provision, criterion or practice were applied by or on behalf of A.
- (4) In relation to the second requirement (as it applies for the purposes of sub-paragraph (2))—
- (a) the reference in section 20(4) to a physical feature is a reference to a physical feature of premises occupied by each of the principals referred to in sub-paragraph (3)(a),
  - (b) the reference to being put at a substantial disadvantage is a reference to being likely to be put at a substantial disadvantage that is the same or similar in the case of each of those principals, and
  - (c) the requirement imposed on A is a requirement to take such steps as it would be reasonable for A to have to take if the premises were occupied by A.

- (5) In relation to the third requirement (as it applies for the purposes of sub-paragraph (2)) –
- (a) the reference in section 20(5) to being put at a substantial disadvantage is a reference to being likely to be put at a substantial disadvantage that is the same or similar in the case of each of the principals referred to in sub-paragraph (3)(a), and
  - (b) the requirement imposed on A is a requirement to take such steps as it would be reasonable for A to have to take if A were the person to whom B was supplied.

*Principals in contract work (see section 41)*

- 6 (1) This paragraph applies where A is a principal.

<i>Relevant matter</i>	<i>Description of disabled person</i>
Contract work that A may make available.	A person who is, or has notified A that the person may be, an applicant to do the work.
Contract work that A makes available.	A person who is supplied to do the work.

- (2) A is not required to do anything that a disabled person's employer is required to do by virtue of paragraph 5.

*Partnerships (see section 44)*

- 7 (1) This paragraph applies where A is a firm or a proposed firm.

<i>Relevant matter</i>	<i>Description of disabled person</i>
Deciding to whom to offer a position as a partner.	A person who is, or has notified A that the person may be, a candidate for the position.
A position as a partner.	A candidate for the position.  The partner who holds the position.

- (2) Where a firm or proposed firm (A) is required by this Schedule to take a step in relation to an interested disabled person (B) –
- (a) the cost of taking the step is to be treated as an expense of A;
  - (b) the extent to which B should (if B is or becomes a partner) bear the cost is not to exceed such amount as is reasonable (having regard in particular to B's entitlement to share in A's profits).

*LLPs (see section 45)*

- 8 (1) This paragraph applies where A is an LLP or a proposed LLP.

<i>Relevant matter</i>	<i>Description of disabled person</i>
Deciding to whom to offer a position as a member.	A person who is, or has notified A that the person may be, a candidate for the position.
A position as a member.	A candidate for the position.  The member who holds the position.

- (2) Where an LLP or proposed LLP (A) is required by this Schedule to take a step in relation to an interested disabled person (B) –
- (a) the cost of taking the step is to be treated as an expense of A;
  - (b) the extent to which B should (if B is or becomes a member) bear the cost is not to exceed such amount as is reasonable (having regard in particular to B's entitlement to share in A's profits).

*Barristers and their clerks (see section 47)*

- 9 This paragraph applies where A is a barrister or barrister's clerk.

<i>Relevant matter</i>	<i>Description of disabled person</i>
Deciding to whom to offer a pupillage or tenancy.	A person who is, or has notified A that the person may be, an applicant for the pupillage or tenancy.
A pupillage or tenancy.	An applicant for the pupillage or tenancy.  The pupil or tenant.

*Advocates and their clerks (see section 48)*

- 10 This paragraph applies where A is an advocate or advocate's clerk.

<i>Relevant matter</i>	<i>Description of disabled person</i>
Deciding who to offer to take as a devil or to whom to offer membership of a stable.	A person who applies, or has notified A that the person may apply, to be taken as a devil or to become a member of the stable.
The relationship with a devil or membership of a stable.	An applicant to be taken as a devil or to become a member of the stable.  The devil or member.

*Persons making appointments to offices etc. (see sections 49 to 51)*

- 11 This paragraph applies where A is a person who has the power to make an appointment to a personal or public office.

<i>Relevant matter</i>	<i>Description of disabled person</i>
Deciding to whom to offer the appointment.	A person who is, or has notified A that the person may be, seeking the appointment.  A person who is being considered for the appointment.
Appointment to the office.	A person who is seeking, or being considered for, appointment to the office.

- 12 This paragraph applies where A is a relevant person in relation to a personal or public office.

<i>Relevant matter</i>	<i>Description of disabled person</i>
Appointment to the office.	A person appointed to the office.

- 13 This paragraph applies where A is a person who has the power to make a recommendation for, or give approval to, an appointment to a public office.

<i>Relevant matter</i>	<i>Description of disabled person</i>
Deciding who to recommend or approve for appointment to the office.	A person who is, or has notified A that the person may be, seeking recommendation or approval for appointment to the office.  A person who is being considered for recommendation or approval for appointment to the office.
An appointment to the office.	A person who is seeking, or being considered for, appointment to the office in question.

- 14 In relation to the second requirement in a case within paragraph 11, 12 or 13, the reference in paragraph 2(2)(b) to premises occupied by A is to be read as a reference to premises—
- (a) under the control of A, and
  - (b) at or from which the functions of the office concerned are performed.

*Qualifications bodies (see section 53)*

15 (1) This paragraph applies where A is a qualifications body.

<i>Relevant matter</i>	<i>Description of disabled person</i>
Deciding upon whom to confer a relevant qualification.	A person who is, or has notified A that the person may be, an applicant for the conferment of the qualification.
Conferment by the body of a relevant qualification.	An applicant for the conferment of the qualification.  A person who holds the qualification.

(2) A provision, criterion or practice does not include the application of a competence standard.

*Employment service-providers (see section 55)*

16 This paragraph applies where –

- (a) A is an employment service-provider, and
- (b) the employment service which A provides is vocational training within the meaning given by section 56(6)(b).

<i>Relevant matter</i>	<i>Description of disabled person</i>
Deciding to whom to offer to provide the service.	A person who is, or has notified A that the person may be, an applicant for the provision of the service.
Provision by A of the service.	A person who applies to A for the provision of the service.  A person to whom A provides the service.

*Trade organisations (see section 57)*

17 This paragraph applies where A is a trade organisation.

<i>Relevant matter</i>	<i>Description of disabled person</i>
Deciding to whom to offer membership of the organisation.	A person who is, or has notified A that the person may be, an applicant for membership.
Membership of the organisation.	An applicant for membership.  A member.

*Local authorities (see section 58)*

18 (1) This paragraph applies where A is a local authority.

<i>Relevant matter</i>	<i>Description of disabled person</i>
A member's carrying-out of official business.	The member.

(2) Regulations may, for the purposes of a case within this paragraph, make provision –

- (a) as to circumstances in which a provision, criterion or practice is, or is not, to be taken to put a disabled person at the disadvantage referred to in the first requirement;
- (b) as to circumstances in which a physical feature is, or is not, to be taken to put a disabled person at the disadvantage referred to in the second requirement;
- (c) as to circumstances in which it is, or in which it is not, reasonable for a local authority to be required to take steps of a prescribed description;
- (d) as to steps which it is always, or which it is never, reasonable for a local authority to take.

*Occupational pensions (see section 61)*

19 This paragraph applies where A is, in relation to an occupational pension scheme, a responsible person within the meaning of section 61.

<i>Relevant matter</i>	<i>Description of disabled person</i>
Carrying out A's functions in relation to the scheme.	A person who is or may be a member of the scheme.

### PART 3

#### LIMITATIONS ON THE DUTY

*Lack of knowledge of disability, etc.*

20 (1) A is not subject to a duty to make reasonable adjustments if A does not know, and could not reasonably be expected to know –

- (a) in the case of an applicant or potential applicant, that an interested disabled person is or may be an applicant for the work in question;
- (b) in any other case referred to in this Part of this Schedule, that an interested disabled person has a disability and is likely to be placed at the disadvantage referred to in the first, second or third requirement.

(2) An applicant is, in relation to the description of A specified in the first column of the table, a person of a description specified in the second column (and the reference to a potential applicant is to be construed accordingly).

<i>Description of A</i>	<i>Applicant</i>
An employer	An applicant for employment
A firm or proposed firm	A candidate for a position as a partner
An LLP or proposed LLP	A candidate for a position as a member
A barrister or barrister's clerk	An applicant for a pupillage or tenancy
An advocate or advocate's clerk	An applicant for being taken as an advocate's devil or for becoming a member of a stable
A relevant person in relation to a personal or public office	A person who is seeking appointment to, or recommendation or approval for appointment to, the office
A qualifications body	An applicant for the conferment of a relevant qualification
An employment service-provider	An applicant for the provision of an employment service
A trade organisation	An applicant for membership

- (3) If the duty to make reasonable adjustments is imposed on A by section 55, this paragraph applies only in so far as the employment service which A provides is vocational training within the meaning given by section 56(6)(b).

SCHEDULE 9

Section 83

WORK: EXCEPTIONS

PART 1

OCCUPATIONAL REQUIREMENTS

*General*

- 1 (1) A person (A) does not contravene a provision mentioned in sub-paragraph (2) by applying in relation to work a requirement to have a particular protected characteristic, if A shows that, having regard to the nature or context of the work—
- (a) it is an occupational requirement,
  - (b) the application of the requirement is a proportionate means of achieving a legitimate aim, and
  - (c) the person to whom A applies the requirement does not meet it (or A has reasonable grounds for not being satisfied that the person meets it).
- (2) The provisions are—



- (a) section 39(1)(a) or (c) or (2)(b) or (c);
  - (b) section 41(1)(b);
  - (c) section 44(1)(a) or (c) or (2)(b) or (c);
  - (d) section 45(1)(a) or (c) or (2)(b) or (c);
  - (e) section 49(3)(a) or (c) or (6)(b) or (c);
  - (f) section 50(3)(a) or (c) or (6)(b) or (c);
  - (g) section 51(1).
- (3) The references in sub-paragraph (1) to a requirement to have a protected characteristic are to be read –
- (a) in the case of gender reassignment, as references to a requirement not to be a transsexual person (and section 7(3) is accordingly to be ignored);
  - (b) in the case of marriage and civil partnership, as references to a requirement not to be married or a civil partner (and section 8(2) is accordingly to be ignored).
- (4) In the case of a requirement to be of a particular sex, sub-paragraph (1) has effect as if in paragraph (c), the words from “(or” to the end were omitted.

*Religious requirements relating to sex, marriage etc., sexual orientation*

- 2 (1) A person (A) does not contravene a provision mentioned in sub-paragraph (2) by applying in relation to employment a requirement to which sub-paragraph (4) applies if A shows that –
- (a) the employment is for the purposes of an organised religion,
  - (b) the application of the requirement engages the compliance or non-conflict principle, and
  - (c) the person to whom A applies the requirement does not meet it (or A has reasonable grounds for not being satisfied that the person meets it).
- (2) The provisions are –
- (a) section 39(1)(a) or (c) or (2)(b) or (c);
  - (b) section 49(3)(a) or (c) or (6)(b) or (c);
  - (c) section 50(3)(a) or (c) or (6)(b) or (c);
  - (d) section 51(1).
- (3) A person does not contravene section 53(1) or (2)(a) or (b) by applying in relation to a relevant qualification (within the meaning of that section) a requirement to which sub-paragraph (4) applies if the person shows that –
- (a) the qualification is for the purposes of employment mentioned in sub-paragraph (1)(a), and
  - (b) the application of the requirement engages the compliance or non-conflict principle.
- (4) This sub-paragraph applies to –
- (a) a requirement to be of a particular sex;
  - (b) a requirement not to be a transsexual person;
  - (c) a requirement not to be married or a civil partner;
  - (d) a requirement not to be married to, or the civil partner of, a person who has a living former spouse or civil partner;

- (e) a requirement relating to circumstances in which a marriage or civil partnership came to an end;
  - (f) a requirement related to sexual orientation.
- (5) The application of a requirement engages the compliance principle if the requirement is applied so as to comply with the doctrines of the religion.
- (6) The application of a requirement engages the non-conflict principle if, because of the nature or context of the employment, the requirement is applied so as to avoid conflicting with the strongly held religious convictions of a significant number of the religion's followers.
- (7) A reference to employment includes a reference to an appointment to a personal or public office.
- (8) In the case of a requirement within sub-paragraph (4)(a), sub-paragraph (1) has effect as if in paragraph (c) the words from “(or)” to the end were omitted.

*Other requirements relating to religion or belief*

- 3 A person (A) with an ethos based on religion or belief does not contravene a provision mentioned in paragraph 1(2) by applying in relation to work a requirement to be of a particular religion or belief if A shows that, having regard to that ethos and to the nature or context of the work—
- (a) it is an occupational requirement,
  - (b) the application of the requirement is a proportionate means of achieving a legitimate aim, and
  - (c) the person to whom A applies the requirement does not meet it (or A has reasonable grounds for not being satisfied that the person meets it).

*Armed forces*

- 4 (1) A person does not contravene section 39(1)(a) or (c) or (2)(b) by applying in relation to service in the armed forces a relevant requirement if the person shows that the application is a proportionate means of ensuring the combat effectiveness of the armed forces.
- (2) A relevant requirement is—
- (a) a requirement to be a man;
  - (b) a requirement not to be a transsexual person.
- (3) This Part of this Act, so far as relating to age or disability, does not apply to service in the armed forces; and section 55, so far as relating to disability, does not apply to work experience in the armed forces.

*Employment services*

- 5 (1) A person (A) does not contravene section 55(1) or (2) if A shows that A's treatment of another person relates only to work the offer of which could be refused to that other person in reliance on paragraph 1, 2, 3 or 4.
- (2) A person (A) does not contravene section 55(1) or (2) if A shows that A's treatment of another person relates only to training for work of a description mentioned in sub-paragraph (1).
- (3) A person (A) does not contravene section 55(1) or (2) if A shows that—

- (a) A acted in reliance on a statement made to A by a person with the power to offer the work in question to the effect that, by virtue of sub-paragraph (1) or (2), A's action would be lawful, and
  - (b) it was reasonable for A to rely on the statement.
- (4) A person commits an offence by knowingly or recklessly making a statement such as is mentioned in sub-paragraph (3)(a) which in a material respect is false or misleading.
- (5) A person guilty of an offence under sub-paragraph (4) is liable on summary conviction to a fine not exceeding level 5 on the standard scale.

### *Interpretation*

- 6 (1) This paragraph applies for the purposes of this Part of this Schedule.
- (2) A reference to contravening a provision of this Act is a reference to contravening that provision by virtue of section 13.
- (3) A reference to work is a reference to employment, contract work, a position as a partner or as a member of an LLP, or an appointment to a personal or public office.
- (4) A reference to a person includes a reference to an organisation.
- (5) A reference to section 39(2)(b), 44(2)(b), 45(2)(b), 49(6)(b) or 50(6)(b) is to be read as a reference to that provision with the omission of the words “or for receiving any other benefit, facility or service”.
- (6) A reference to section 39(2)(c), 44(2)(c), 45(2)(c), 49(6)(c), 50(6)(c), 53(2)(a) or 55(2)(c) (dismissal, etc.) does not include a reference to that provision so far as relating to sex.
- (7) The reference to paragraph (b) of section 41(1), so far as relating to sex, is to be read as if that paragraph read –
- “(b) by not allowing the worker to do the work.”

## PART 2

### EXCEPTIONS RELATING TO AGE

#### *Preliminary*

- 7 For the purposes of this Part of this Schedule, a reference to an age contravention is a reference to a contravention of this Part of this Act, so far as relating to age.

#### *Retirement*

- 8 (1) It is not an age contravention to dismiss a relevant worker at or over the age of 65 if the reason for the dismissal is retirement.
- (2) Each of the following is a relevant worker –
- (a) an employee within the meaning of section 230(1) of the Employment Rights Act 1996;
  - (b) a person in Crown employment;
  - (c) a relevant member of the House of Commons staff;

- (d) a relevant member of the House of Lords staff.
- (3) Retirement is a reason for dismissal only if it is a reason for dismissal by virtue of Part 10 of the Employment Rights Act 1996.

*Applicants at or approaching retirement age*

- 9 (1) A person does not contravene section 39(1)(a) or (c), so far as relating to age, in a case where the other person –
- (a) has attained the age limit, or would have attained it before the end of six months beginning with the date on which the application for the employment had to be made, and
  - (b) would, if recruited for the employment, be a relevant worker within the meaning of paragraph 8.
- (2) The age limit is whichever is the greater of –
- (a) the age of 65, and
  - (b) the normal retirement age in the case of the employment concerned.
- (3) The reference to the normal retirement age is to be construed in accordance with section 98ZH of the Employment Rights Act 1996.

*Benefits based on length of service*

- 10 (1) It is not an age contravention for a person (A) to put a person (B) at a disadvantage when compared with another (C), in relation to the provision of a benefit, facility or service in so far as the disadvantage is because B has a shorter period of service than C.
- (2) If B's period of service exceeds 5 years, A may rely on sub-paragraph (1) only if A reasonably believes that doing so fulfils a business need.
- (3) A person's period of service is whichever of the following A chooses –
- (a) the period for which the person has been working for A at or above a level (assessed by reference to the demands made on the person) that A reasonably regards as appropriate for the purposes of this paragraph, or
  - (b) the period for which the person has been working for A at any level.
- (4) The period for which a person has been working for A must be based on the number of weeks during the whole or part of which the person has worked for A.
- (5) But for that purpose A may, so far as is reasonable, discount –
- (a) periods of absence;
  - (b) periods that A reasonably regards as related to periods of absence.
- (6) For the purposes of sub-paragraph (3)(b), a person is to be treated as having worked for A during any period in which the person worked for a person other than A if –
- (a) that period counts as a period of employment with A as a result of section 218 of the Employment Rights Act 1996, or
  - (b) if sub-paragraph (a) does not apply, that period is treated as a period of employment by an enactment pursuant to which the person's employment was transferred to A.

- (7) For the purposes of this paragraph, the reference to a benefit, facility or service does not include a reference to a benefit, facility or service which may be provided only by virtue of a person's ceasing to work.

*The national minimum wage: young workers*

- 11 (1) It is not an age contravention for a person to pay a young worker (A) at a lower rate than that at which the person pays an older worker (B) if –
- (a) the hourly rate for the national minimum wage for a person of A's age is lower than that for a person of B's age, and
  - (b) the rate at which A is paid is below the single hourly rate.
- (2) A young worker is a person who qualifies for the national minimum wage at a lower rate than the single hourly rate; and an older worker is a person who qualifies for the national minimum wage at a higher rate than that at which the young worker qualifies for it.
- (3) The single hourly rate is the rate prescribed under section 1(3) of the National Minimum Wage Act 1998.

*The national minimum wage: apprentices*

- 12 (1) It is not an age contravention for a person to pay an apprentice who does not qualify for the national minimum wage at a lower rate than the person pays an apprentice who does.
- (2) An apprentice is a person who –
- (a) is employed under a contract of apprenticeship, or
  - (b) as a result of provision made by virtue of section 3(2)(a) of the National Minimum Wage Act 1998 (persons not qualifying), is treated as employed under a contract of apprenticeship.

*Redundancy*

- 13 (1) It is not an age contravention for a person to give a qualifying employee an enhanced redundancy payment of an amount less than that of an enhanced redundancy payment which the person gives to another qualifying employee, if each amount is calculated on the same basis.
- (2) It is not an age contravention to give enhanced redundancy payments only to those who are qualifying employees by virtue of sub-paragraph (3)(a) or (b).
- (3) A person is a qualifying employee if the person –
- (a) is entitled to a redundancy payment as a result of section 135 of the Employment Rights Act 1996,
  - (b) agrees to the termination of the employment in circumstances where the person would, if dismissed, have been so entitled,
  - (c) would have been so entitled but for section 155 of that Act (requirement for two years' continuous employment), or
  - (d) agrees to the termination of the employment in circumstances where the person would, if dismissed, have been so entitled but for that section.

- (4) An enhanced redundancy payment is a payment the amount of which is, subject to sub-paragraphs (5) and (6), calculated in accordance with section 162(1) to (3) of the Employment Rights Act 1996.
- (5) A person making a calculation for the purposes of sub-paragraph (4) –
  - (a) may treat a week’s pay as not being subject to a maximum amount;
  - (b) may treat a week’s pay as being subject to a maximum amount above that for the time being specified in section 227(1) of the Employment Rights Act 1996;
  - (c) may multiply the appropriate amount for each year of employment by a figure of more than one.
- (6) Having made a calculation for the purposes of sub-paragraph (4) (whether or not in reliance on sub-paragraph (5)), a person may multiply the amount calculated by a figure of more than one.
- (7) In sub-paragraph (5), “the appropriate amount” has the meaning given in section 162 of the Employment Rights Act 1996, and “a week’s pay” is to be read with Chapter 2 of Part 14 of that Act.
- (8) For the purposes of sub-paragraphs (4) to (6), the reference to “the relevant date” in subsection (1)(a) of section 162 of that Act is, in the case of a person who is a qualifying employee by virtue of sub-paragraph (3)(b) or (d), to be read as reference to the date of the termination of the employment.

#### *Life assurance*

- 14 (1) This paragraph applies if a person (A) takes early retirement because of ill health.
- (2) It is not an age contravention to provide A with life assurance cover for the period starting when A retires and ending –
  - (a) if there is a normal retirement age, when A attains the normal retirement age;
  - (b) in any other case, when A attains the age of 65.
- (3) The normal retirement age in relation to A is the age at which, when A retires, persons holding comparable positions in the same undertaking are normally required to retire.

#### *Child care*

- 15 (1) A person does not contravene a relevant provision, so far as relating to age, only by providing, or making arrangements for or facilitating the provision of, care for children of a particular age group.
- (2) The relevant provisions are –
  - (a) section 39(2)(b);
  - (b) section 41(1)(c);
  - (c) section 44(2)(b);
  - (d) section 45(2)(b);
  - (e) section 47(2)(b);
  - (f) section 48(2)(b);
  - (g) section 49(6)(b);
  - (h) section 50(6)(b);



- (i) section 57(2)(a);
  - (j) section 58(3)(a).
- (3) Facilitating the provision of care for a child includes –
- (a) paying for some or all of the cost of the provision;
  - (b) helping a parent of the child to find a suitable person to provide care for the child;
  - (c) enabling a parent of the child to spend more time providing care for the child or otherwise assisting the parent with respect to the care that the parent provides for the child.
- (4) A child is a person who has not attained the age of 17.
- (5) A reference to care includes a reference to supervision.

*Contributions to personal pension schemes*

- 16 (1) A Minister of the Crown may by order provide that it is not an age contravention for an employer to maintain or use, with respect to contributions to personal pension schemes, practices, actions or decisions relating to age which are of a specified description.
- (2) An order authorising the use of practices, actions or decisions which are not in use before the order comes into force must not be made unless the Minister consults such persons as the Minister thinks appropriate.
- (3) “Personal pension scheme” has the meaning given in section 1 of the Pension Schemes Act 1993; and “employer”, in relation to a personal pension scheme, has the meaning given in section 318(1) of the Pensions Act 2004.

PART 3

OTHER EXCEPTIONS

*Non-contractual payments to women on maternity leave*

- 17 (1) A person does not contravene section 39(1)(b) or (2), so far as relating to pregnancy and maternity, by depriving a woman who is on maternity leave of any benefit from the terms of her employment relating to pay.
- (2) The reference in sub-paragraph (1) to benefit from the terms of a woman’s employment relating to pay does not include a reference to –
- (a) maternity-related pay (including maternity-related pay that is increase-related),
  - (b) pay (including increase-related pay) in respect of times when she is not on maternity leave, or
  - (c) pay by way of bonus in respect of times when she is on compulsory maternity leave.
- (3) For the purposes of sub-paragraph (2), pay is increase-related in so far as it is to be calculated by reference to increases in pay that the woman would have received had she not been on maternity leave.
- (4) A reference to terms of her employment is a reference to terms of her employment that are not in her contract of employment, her contract of apprenticeship or her contract to do work personally.

- (5) “Pay” means benefits –
- (a) that consist of the payment of money to an employee by way of wages or salary, and
  - (b) that are not benefits whose provision is regulated by the contract referred to in sub-paragraph (4).
- (6) “Maternity-related pay” means pay to which a woman is entitled –
- (a) as a result of being pregnant, or
  - (b) in respect of times when she is on maternity leave.

*Benefits dependent on marital status, etc.*

- 18 (1) A person does not contravene this Part of this Act, so far as relating to sexual orientation, by doing anything which prevents or restricts a person who is not married from having access to a benefit, facility or service –
- (a) the right to which accrued before 5 December 2005 (the day on which section 1 of the Civil Partnership Act 2004 came into force), or
  - (b) which is payable in respect of periods of service before that date.
- (2) A person does not contravene this Part of this Act, so far as relating to sexual orientation, by providing married persons and civil partners (to the exclusion of all other persons) with access to a benefit, facility or service.

*Provision of services etc. to the public*

- 19 (1) A does not contravene a provision mentioned in sub-paragraph (2) in relation to the provision of a benefit, facility or service to B if A is concerned with the provision (for payment or not) of a benefit, facility or service of the same description to the public.
- (2) The provisions are –
- (a) section 39(2) and (4);
  - (b) section 41(1) and (3);
  - (c) sections 44(2) and (6) and 45(2) and (6);
  - (d) sections 49(6) and (8) and 50(6), (7), (9) and (10).
- (3) Sub-paragraph (1) does not apply if –
- (a) the provision by A to the public differs in a material respect from the provision by A to comparable persons,
  - (b) the provision to B is regulated by B’s terms, or
  - (c) the benefit, facility or service relates to training.
- (4) “Comparable persons” means –
- (a) in relation to section 39(2) or (4), the other employees;
  - (b) in relation to section 41(1) or (3), the other contract workers supplied to the principal;
  - (c) in relation to section 44(2) or (6), the other partners of the firm;
  - (d) in relation to section 45(2) or (6), the other members of the LLP;
  - (e) in relation to section 49(6) or (8) or 50(6), (7), (9) or (10), persons holding offices or posts not materially different from that held by B.
- (5) “B’s terms” means –
- (a) the terms of B’s employment,
  - (b) the terms on which the principal allows B to do the contract work,



- (c) the terms on which B has the position as a partner or member, or
  - (d) the terms of B's appointment to the office.
- (6) A reference to the public includes a reference to a section of the public which includes B.

*Insurance contracts, etc.*

- 20 (1) It is not a contravention of this Part of this Act, so far as relating to relevant discrimination, to do anything in relation to an annuity, life insurance policy, accident insurance policy or similar matter involving the assessment of risk if—
- (a) that thing is done by reference to actuarial or other data from a source on which it is reasonable to rely, and
  - (b) it is reasonable to do it.
- (2) “Relevant discrimination” is—
- (a) gender reassignment discrimination;
  - (b) marriage and civil partnership discrimination;
  - (c) pregnancy and maternity discrimination;
  - (d) sex discrimination.

SCHEDULE 10

Section 88

ACCESSIBILITY FOR DISABLED PUPILS

*Accessibility strategies*

- 1 (1) A local authority in England and Wales must, in relation to schools for which it is the responsible body, prepare—
- (a) an accessibility strategy;
  - (b) further such strategies at such times as may be prescribed.
- (2) An accessibility strategy is a strategy for, over a prescribed period—
- (a) increasing the extent to which disabled pupils can participate in the schools' curriculums;
  - (b) improving the physical environment of the schools for the purpose of increasing the extent to which disabled pupils are able to take advantage of education and benefits, facilities or services provided or offered by the schools;
  - (c) improving the delivery to disabled pupils of information which is readily accessible to pupils who are not disabled.
- (3) The delivery in sub-paragraph (2)(c) must be—
- (a) within a reasonable time;
  - (b) in ways which are determined after taking account of the pupils' disabilities and any preferences expressed by them or their parents.
- (4) An accessibility strategy must be in writing.
- (5) A local authority must keep its accessibility strategy under review during the period to which it relates and, if necessary, revise it.

- 
- (6) A local authority must implement its accessibility strategy.
- 2 (1) In preparing its accessibility strategy, a local authority must have regard to—
- (a) the need to allocate adequate resources for implementing the strategy;
  - (b) guidance as to the matters mentioned in sub-paragraph (3).
- (2) The authority must also have regard to guidance as to compliance with paragraph 1(5).
- (3) The matters are—
- (a) the content of an accessibility strategy;
  - (b) the form in which it is to be produced;
  - (c) persons to be consulted in its preparation.
- (4) Guidance may be issued—
- (a) for England, by a Minister of the Crown;
  - (b) for Wales, by the Welsh Ministers.
- (5) A local authority must, if asked, make a copy of its accessibility strategy available for inspection at such reasonable times as it decides.
- (6) A local authority in England must, if asked by a Minister of the Crown, give the Minister a copy of its accessibility strategy.
- (7) A local authority in Wales must, if asked by the Welsh Ministers, give them a copy of its accessibility strategy.

#### *Accessibility plans*

- 3 (1) The responsible body of a school in England and Wales must prepare—
- (a) an accessibility plan;
  - (b) further such plans at such times as may be prescribed.
- (2) An accessibility plan is a plan for, over a prescribed period—
- (a) increasing the extent to which disabled pupils can participate in the school's curriculum,
  - (b) improving the physical environment of the school for the purpose of increasing the extent to which disabled pupils are able to take advantage of education and benefits, facilities or services provided or offered by the school, and
  - (c) improving the delivery to disabled pupils of information which is readily accessible to pupils who are not disabled.
- (3) The delivery in sub-paragraph (2)(c) must be—
- (a) within a reasonable time;
  - (b) in ways which are determined after taking account of the pupils' disabilities and any preferences expressed by them or their parents.
- (4) An accessibility plan must be in writing.
- (5) The responsible body must keep its accessibility plan under review during the period to which it relates and, if necessary, revise it.
- (6) The responsible body must implement its accessibility plan.

- (7) A relevant inspection may extend to the performance by the responsible body of its functions in relation to the preparation, publication, review, revision and implementation of its accessibility plan.
  - (8) A relevant inspection is an inspection under –
    - (a) Part 1 of the Education Act 2005, or
    - (b) Chapter 1 of Part 4 of the Education and Skills Act 2008 (regulation and inspection of independent education provision in England).
- 4
- (1) In preparing an accessibility plan, the responsible body must have regard to the need to allocate adequate resources for implementing the plan.
  - (2) The proprietor of an independent educational institution (other than an Academy) must, if asked, make a copy of the school's accessibility plan available for inspection at such reasonable times as the proprietor decides.
  - (3) The proprietor of an independent educational institution in England (other than an Academy) must, if asked by a Minister of the Crown, give the Minister a copy of the school's accessibility plan.
  - (4) The proprietor of an independent school in Wales (other than an Academy) must, if asked by the Welsh Ministers, give them a copy of the school's accessibility plan.

*Power of direction*

- 5
- (1) This sub-paragraph applies if the appropriate authority is satisfied (whether or not on a complaint) that a responsible body –
    - (a) has acted or is proposing to act unreasonably in the discharge of a duty under this Schedule, or
    - (b) has failed to discharge such a duty.
  - (2) This sub-paragraph applies if the appropriate authority is satisfied (whether or not on a complaint) that a responsible body of a school specified in sub-paragraph (3) –
    - (a) has acted or is proposing to act unreasonably in the discharge of a duty the body has in relation to the provision to the authority of copies of the body's accessibility plan or the inspection of that plan, or
    - (b) has failed to discharge the duty.
  - (3) The schools are –
    - (a) schools approved under section 342 of the Education Act 1996 (non-maintained special schools);
    - (b) Academies.
  - (4) This sub-paragraph applies if a Tribunal has made an order under paragraph 5 of Schedule 17 and the appropriate authority is satisfied (whether or not on a complaint) that the responsible body concerned –
    - (a) has acted or is proposing to act unreasonably in complying with the order, or
    - (b) has failed to comply with the order.
  - (5) If sub-paragraph (1), (2) or (4) applies, the appropriate authority may give a responsible body such directions as the authority thinks expedient as to –
    - (a) the discharge by the body of the duty, or

- (b) compliance by the body with the order.
- (6) A direction may be given in relation to sub-paragraph (1) or (2) even if the performance of the duty is contingent on the opinion of the responsible body.
- (7) A direction may not, unless sub-paragraph (8) applies, be given to the responsible body of a school in England in respect of a matter –
- (a) that has been complained about to a Local Commissioner in accordance with Chapter 2 of Part 10 of the Apprenticeships, Skills, Children and Learning Act 2009 (parental complaints against governing bodies etc.), or
  - (b) that the appropriate authority thinks could have been so complained about.
- (8) This sub-paragraph applies if –
- (a) the Local Commissioner has made a recommendation to the responsible body under section 211(4) of the Apprenticeships, Skills, Children and Learning Act 2009 (statement following investigation) in respect of the matter, and
  - (b) the responsible body has not complied with the recommendation.
- (9) A direction –
- (a) may be varied or revoked by the appropriate authority;
  - (b) may be enforced, on the application of the appropriate authority, by a mandatory order obtained in accordance with section 31 of the Senior Courts Act 1981.
- (10) The appropriate authority is –
- (a) in relation to the responsible body of a school in England, the Secretary of State;
  - (b) in relation to the responsible body of a school in Wales, the Welsh Ministers.

### *Supplementary*

- 6 (1) This paragraph applies for the purposes of this Schedule.
- (2) Regulations may prescribe services which are, or are not, to be regarded as being –
- (a) education;
  - (b) a benefit, facility or service.
- (3) The power to make regulations is exercisable by –
- (a) in relation to England, a Minister of the Crown;
  - (b) in relation to Wales, the Welsh Ministers.
- (4) “Disabled pupil” includes a disabled person who may be admitted to the school as a pupil.
- (5) “Responsible body” means –
- (a) in relation to a maintained school or a maintained nursery school, the local authority or governing body;
  - (b) in relation to a pupil referral unit, the local authority;
  - (c) in relation to an independent educational institution, the proprietor;

- (d) in relation to a special school not maintained by a local authority, the proprietor.
- (6) “Governing body”, in relation to a maintained school, means the body corporate (constituted in accordance with regulations under section 19 of the Education Act 2002) which the school has as a result of that section.
- (7) “Maintained school” has the meaning given in section 20 of the School Standards and Framework Act 1998; and “maintained nursery school” has the meaning given in section 22 of that Act.

## SCHEDULE 11

Section 89

## SCHOOLS: EXCEPTIONS

## PART 1

## SEX DISCRIMINATION

*Admission to single-sex schools*

- 1 (1) Section 85(1), so far as relating to sex, does not apply in relation to a single-sex school.
- (2) A single-sex school is a school which –
- (a) admits pupils of one sex only, or
  - (b) on the basis of the assumption in sub-paragraph (3), would be taken to admit pupils of one sex only.
- (3) That assumption is that pupils of the opposite sex are to be disregarded if –
- (a) their admission to the school is exceptional, or
  - (b) their numbers are comparatively small and their admission is confined to particular courses or classes.
- (4) In the case of a school which is a single-sex school by virtue of sub-paragraph (3)(b), section 85(2)(a) to (d), so far as relating to sex, does not prohibit confining pupils of the same sex to particular courses or classes.

*Single-sex boarding at schools*

- 2 (1) Section 85(1), so far as relating to sex, does not apply in relation to admission as a boarder to a school to which this paragraph applies.
- (2) Section 85(2)(a) to (d), so far as relating to sex, does not apply in relation to boarding facilities at a school to which this paragraph applies.
- (3) This paragraph applies to a school (other than a single-sex school) which has some pupils as boarders and others as non-boarders and which –
- (a) admits as boarders pupils of one sex only, or
  - (b) on the basis of the assumption in sub-paragraph (4), would be taken to admit as boarders pupils of one sex only.
- (4) That assumption is that pupils of the opposite sex admitted as boarders are to be disregarded if their numbers are small compared to the numbers of other pupils admitted as boarders.

*Single-sex schools turning co-educational*

- 3 (1) If the responsible body of a single-sex school decides to alter its admissions arrangements so that the school will cease to be a single-sex school, the body may apply for a transitional exemption order in relation to the school.
- (2) If the responsible body of a school to which paragraph 2 applies decides to alter its admissions arrangements so that the school will cease to be one to which that paragraph applies, the body may apply for a transitional exemption order in relation to the school.
- (3) A transitional exemption order in relation to a school is an order which, during the period specified in the order as the transitional period, authorises –
- (a) sex discrimination by the responsible body of the school in the arrangements it makes for deciding who is offered admission as a pupil;
  - (b) the responsible body, in the circumstances specified in the order, not to admit a person as a pupil because of the person's sex.
- (4) Paragraph 4 applies in relation to the making of transitional exemption orders.
- (5) The responsible body of a school does not contravene this Act, so far as relating to sex discrimination, if –
- (a) in accordance with a transitional exemption order, or
  - (b) pending the determination of an application for a transitional exemption order in relation to the school,
- it does not admit a person as a pupil because of the person's sex.
- 4 (1) In the case of a maintained school within the meaning given by section 32 of the Education and Inspections Act 2006, a transitional exemption order may be made in accordance with such provision as is made in regulations under section 21 of that Act (orders made by local authority or adjudicator in relation to schools in England).
- (2) In the case of a school in Wales maintained by a local authority, a transitional exemption order may be made in accordance with paragraph 22 of Schedule 6, or paragraph 17 of Schedule 7, to the School Standards and Framework Act 1998 (orders made by Welsh Ministers).
- (3) In the case of a school in Scotland managed by an education authority or in respect of which the managers are for the time being receiving grants under section 73(c) or (d) of the Education (Scotland) Act 1980 –
- (a) the responsible body may submit to the Scottish Ministers an application for the making of a transitional exemption order, and
  - (b) the Scottish Ministers may make the order.
- (4) Where, under section 113A of the Learning and Skills Act 2000, the Learning and Skills Council for England make proposals to the Secretary of State for an alteration in the admissions arrangements of a single-sex school or a school to which paragraph 2 applies –
- (a) the making of the proposals is to be treated as an application to the Secretary of State for the making of a transitional exemption order, and
  - (b) the Secretary of State may make the order.



- (5) Where proposals are made to the Welsh Ministers under section 113A of the Learning and Skills Act 2000 for an alteration in the admissions arrangements of a single-sex school or a school to which paragraph 2 applies –
- (a) the making of the proposals is to be treated as an application to the Welsh Ministers for the making of a transitional exemption order, and
  - (b) the Welsh Ministers may make the order.
- (6) In the case of a school in England or Wales not coming within sub-paragraph (1), (2), (4) or (5) or an independent school in Scotland –
- (a) the responsible body may submit to the Commission an application for the making of a transitional exemption order, and
  - (b) the Commission may make the order.
- (7) An application under sub-paragraph (6) must specify –
- (a) the period proposed by the responsible body as the transitional period to be specified in the order,
  - (b) the stages within that period by which the body proposes to move to the position where section 85(1)(a) and (c), so far as relating to sex, is complied with, and
  - (c) any other matters relevant to the terms and operation of the order applied for.
- (8) The Commission must not make an order on an application under sub-paragraph (6) unless satisfied that the terms of the application are reasonable, having regard to –
- (a) the nature of the school’s premises,
  - (b) the accommodation, equipment and facilities available, and
  - (c) the responsible body’s financial resources.

## PART 2

### RELIGIOUS OR BELIEF-RELATED DISCRIMINATION

*School with religious character etc.*

- 5 Section 85(1) and (2)(a) to (d), so far as relating to religion or belief, does not apply in relation to –
- (a) a school designated under section 69(3) of the School Standards and Framework Act 1998 (foundation or voluntary school with religious character);
  - (b) a school listed in the register of independent schools for England or for Wales, if the school’s entry in the register records that the school has a religious ethos;
  - (c) a school transferred to an education authority under section 16 of the Education (Scotland) Act 1980 (transfer of certain schools to education authorities) which is conducted in the interest of a church or denominational body;
  - (d) a school provided by an education authority under section 17(2) of that Act (denominational schools);
  - (e) a grant-aided school (within the meaning of that Act) which is conducted in the interest of a church or denominational body;

- (f) a school registered in the register of independent schools for Scotland if the school admits only pupils who belong, or whose parents belong, to one or more particular denominations;
- (g) a school registered in that register if the school is conducted in the interest of a church or denominational body.

*Curriculum, worship, etc.*

- 6 Section 85(2)(a) to (d), so far as relating to religion or belief, does not apply in relation to anything done in connection with acts of worship or other religious observance organised by or on behalf of a school (whether or not forming part of the curriculum).

*Power to amend*

- 7 (1) A Minister of the Crown may by order amend this Part of this Schedule –
- (a) so as to add, vary or omit an exception to section 85;
  - (b) so as to make provision about the construction or application of section 19(2)(d) in relation to section 85.
- (2) The power under sub-paragraph (1) is exercisable only in relation to religious or belief-related discrimination.
- (3) Before making an order under this paragraph the Minister must consult –
- (a) the Welsh Ministers,
  - (b) the Scottish Ministers, and
  - (c) such other persons as the Minister thinks appropriate.

PART 3

DISABILITY DISCRIMINATION

*Permitted form of selection*

- 8 (1) A person does not contravene section 85(1), so far as relating to disability, only by applying a permitted form of selection.
- (2) In relation to England and Wales, a permitted form of selection is –
- (a) in the case of a maintained school which is not designated as a grammar school under section 104 of the School Standards and Framework Act 1998, a form of selection mentioned in section 99(2) or (4) of that Act;
  - (b) in the case of a maintained school which is so designated, its selective admission arrangements (within the meaning of section 104 of that Act);
  - (c) in the case of an independent educational institution, arrangements which provide for some or all of its pupils to be selected by reference to general or special ability or aptitude, with a view to admitting only pupils of high ability or aptitude.
- (3) In relation to Scotland, a permitted form of selection is –
- (a) in the case of a school managed by an education authority, arrangements approved by the Scottish Ministers for the selection of pupils for admission;



- (b) in the case of an independent school, arrangements which provide for some or all of its pupils to be selected by reference to general or special ability or aptitude, with a view to admitting only pupils of high ability or aptitude.
- (4) “Maintained school” has the meaning given in section 22 of the School Standards and Framework Act 1998.

## SCHEDULE 12

Section 94

## FURTHER AND HIGHER EDUCATION EXCEPTIONS

## PART 1

## SINGLE-SEX INSTITUTIONS, ETC.

*Admission to single-sex institutions*

- 1 (1) Section 91(1), so far as relating to sex, does not apply in relation to a single-sex institution.
- (2) A single-sex institution is an institution to which section 91 applies, which—
  - (a) admits students of one sex only, or
  - (b) on the basis of the assumption in sub-paragraph (3), would be taken to admit students of one sex only.
- (3) That assumption is that students of the opposite sex are to be disregarded if—
  - (a) their admission to the institution is exceptional, or
  - (b) their numbers are comparatively small and their admission is confined to particular courses or classes.
- (4) In the case of an institution which is a single-sex institution by virtue of sub-paragraph (3)(b), section 91(2)(a) to (d), so far as relating to sex, does not prohibit confining students of the same sex to particular courses or classes.

*Single-sex institutions turning co-educational*

- 2 (1) If the responsible body of a single-sex institution decides to alter its admissions arrangements so that the institution will cease to be a single-sex institution, the body may apply for a transitional exemption order in relation to the institution.
- (2) A transitional exemption order relating to an institution is an order which, during the period specified in the order as the transitional period, authorises—
  - (a) sex discrimination by the responsible body of the institution in the arrangements it makes for deciding who is offered admission as a student;
  - (b) the responsible body, in the circumstances specified in the order, not to admit a person as a student because of the person’s sex.
- (3) Paragraph 3 applies in relation to the making of a transitional exemption order.

- 
- (4) The responsible body of an institution does not contravene this Act, so far as relating to sex discrimination, if –
- (a) in accordance with a transitional exemption order, or
  - (b) pending the determination of an application for a transitional exemption order in relation to the institution,
- it does not admit a person as a student because of the person's sex.
- (5) The responsible body of an institution does not contravene this Act, so far as relating to sex discrimination, if –
- (a) in accordance with a transitional exemption order, or
  - (b) pending the determination of an application for a transitional exemption order in relation to the institution,
- it discriminates in the arrangements it makes for deciding who is offered admission as a student.
- 3 (1) In the case of a single-sex institution –
- (a) its responsible body may submit to the Commission an application for the making of a transitional exemption order, and
  - (b) the Commission may make the order.
- (2) An application under sub-paragraph (1) must specify –
- (a) the period proposed by the responsible body as the transitional period to be specified in the order,
  - (b) the stages, within that period, by which the body proposes to move to the position where section 91(1)(a) and (c), so far as relating to sex, is complied with, and
  - (c) any other matters relevant to the terms and operation of the order applied for.
- (3) The Commission must not make an order on an application under sub-paragraph (1) unless satisfied that the terms of the application are reasonable, having regard to –
- (a) the nature of the institution's premises,
  - (b) the accommodation, equipment and facilities available, and
  - (c) the responsible body's financial resources.

## PART 2

### OTHER EXCEPTIONS

#### *Occupational requirements*

- 4 A person (P) does not contravene section 91(1) or (2) if P shows that P's treatment of another person relates only to training that would help fit that other person for work the offer of which the other person could be refused in reliance on Part 1 of Schedule 9.

#### *Institutions with a religious ethos*

- 5 (1) The responsible body of an institution which is designated for the purposes of this paragraph does not contravene section 91(1), so far as relating to religion or belief, if, in the admission of students to a course at the institution –
- (a) it gives preference to persons of a particular religion or belief,

- (b) it does so to preserve the institution’s religious ethos, and
  - (c) the course is not a course of vocational training.
- (2) A Minister of the Crown may by order designate an institution if satisfied that the institution has a religious ethos.

*Benefits dependent on marital status, etc.*

- 6 A person does not contravene section 91, so far as relating to sexual orientation, by providing married persons and civil partners (to the exclusion of all other persons) with access to a benefit, facility or service.

*Child care*

- 7 (1) A person does not contravene section 91(2)(b) or (d), so far as relating to age, only by providing, or making arrangements for or facilitating the provision of, care for children of a particular age group.
- (2) Facilitating the provision of care for a child includes—
- (a) paying for some or all of the cost of the provision;
  - (b) helping a parent of the child to find a suitable person to provide care for the child;
  - (c) enabling a parent of the child to spend more time providing care for the child or otherwise assisting the parent with respect to the care that the parent provides for the child.
- (3) A child is a person who has not attained the age of 17.
- (4) A reference to care includes a reference to supervision.

SCHEDULE 13

Section 98

EDUCATION: REASONABLE ADJUSTMENTS

*Preliminary*

- 1 This Schedule applies where a duty to make reasonable adjustments is imposed on A by this Part.

*The duty for schools*

- 2 (1) This paragraph applies where A is the responsible body of a school to which section 85 applies.
- (2) A must comply with the first and third requirements.
- (3) For the purposes of this paragraph—
- (a) the reference in section 20(3) to a provision, criterion or practice is a reference to a provision, criterion or practice applied by or on behalf of A;
  - (b) the reference in section 20(3) or (5) to a disabled person is—
    - (i) in relation to a relevant matter within sub-paragraph (4)(a), a reference to disabled persons generally;

- (ii) in relation to a relevant matter within sub-paragraph (4)(b), a reference to disabled pupils generally.
- (4) In relation to each requirement, the relevant matters are –
- (a) deciding who is offered admission as a pupil;
  - (b) provision of education or access to a benefit, facility or service.

*The duty for further or higher education institutions*

- 3 (1) This paragraph applies where A is the responsible body of an institution to which section 91 applies.
- (2) A must comply with the first, second and third requirements.
- (3) For the purposes of this paragraph –
- (a) the reference in section 20(3) to a provision, criterion or practice is a reference to a provision, criterion or practice applied by or on behalf of A;
  - (b) the reference in section 20(4) to a physical feature is a reference to a physical feature of premises occupied by A;
  - (c) the reference in section 20(3), (4) or (5) to a disabled person is –
    - (i) in relation to a relevant matter within sub-paragraph (4)(a), a reference to disabled persons generally;
    - (ii) in relation to a relevant matter within sub-paragraph (4)(b) or (c), a reference to disabled students generally;
    - (iii) in relation to a relevant matter within sub-paragraph (4)(d) or (e) below, a reference to an interested disabled person.
- (4) In relation to each requirement, the relevant matters are –
- (a) deciding who is offered admission as a student;
  - (b) provision of education;
  - (c) access to a benefit, facility or service;
  - (d) deciding on whom a qualification is conferred;
  - (e) a qualification that A confers.
- 4 (1) An interested disabled person is a disabled person who, in relation to a relevant matter specified in the first column of the table, is of a description specified in the second column.

<i>Case</i>	<i>Description of disabled person</i>
Deciding upon whom to confer a qualification.	A person who is, or has notified A that the person may be, an applicant for the conferment of the qualification.
A qualification that A confers.	An applicant for the conferment by A of the qualification.  A person on whom A confers the qualification.

- (2) A provision, criterion or practice does not include the application of a competence standard.

- (3) A competence standard is an academic, medical or other standard applied for the purpose of determining whether or not a person has a particular level of competence or ability.

*The duty relating to certain other further or higher education courses*

- 5 (1) This paragraph applies where A is the responsible body in relation to a course to which section 92 applies.
- (2) A must comply with the first, second and third requirements; but if A is the governing body of a maintained school (within the meaning given by that section), A is not required to comply with the second requirement.
- (3) For the purposes of this paragraph –
- (a) the reference in section 20(3) to a provision, criterion or practice is a reference to a provision, criterion or practice applied by or on behalf of A;
  - (b) the reference in section 20(4) to a physical feature is a reference to a physical feature of premises occupied by A;
  - (c) the reference in section 20(3), (4) or (5) to a disabled person is –
    - (i) in relation to a relevant matter within sub-paragraph (4)(a), a reference to disabled persons generally;
    - (ii) in relation to a relevant matter within sub-paragraph (4)(b), a reference to disabled persons generally who are enrolled on the course.
- (4) In relation to each requirement, the relevant matters are –
- (a) arrangements for enrolling persons on a course of further or higher education secured by A;
  - (b) services provided by A for persons enrolled on the course.

*The duty relating to recreational or training facilities*

- 6 (1) This paragraph applies where A is the responsible body in relation to facilities to which section 93 applies.
- (2) A must comply with the first, second and third requirements.
- (3) For the purposes of this paragraph –
- (a) the reference in section 20(3) to a provision, criterion or practice is a reference to a provision, criterion or practice applied by or on behalf of A;
  - (b) the reference in section 20(4) to a physical feature is a reference to a physical feature of premises occupied by A;
  - (c) the reference in section 20(3), (4) or (5) to a disabled person is a reference to disabled persons generally.
- (4) In relation to each requirement, the relevant matter is A's arrangements for providing the recreational or training facilities.

*Code of practice*

- 7 In deciding whether it is reasonable for A to have to take a step for the purpose of complying with the first, second or third requirement, A must

have regard to relevant provisions of a code of practice issued under section 14 of the Equality Act 2006.

*Confidentiality requests*

- 8 (1) This paragraph applies if a person has made a confidentiality request of which A is aware.
- (2) In deciding whether it is reasonable for A to have to take a step in relation to that person so as to comply with the first, second or third requirement, A must have regard to the extent to which taking the step is consistent with the request.
- (3) In a case within paragraph 2, a “confidentiality request” is a request—
- (a) that the nature or existence of a disabled person’s disability be treated as confidential, and
  - (b) which satisfies either of the following conditions.
- (4) The first condition is that the request is made by the person’s parent.
- (5) The second condition is that—
- (a) it is made by the person, and
  - (b) A reasonably believes that the person has sufficient understanding of the nature and effect of the request.
- (6) In a case within paragraph 3, a “confidentiality request” is a request by a disabled person that the nature or existence of the person’s disability be treated as confidential.

*The duty for general qualifications bodies*

- 9 (1) This paragraph applies where A is a qualifications body for the purposes of section 96.
- (2) Paragraphs 3 and 4(1), so far as relating to qualifications, apply to a qualifications body as they apply to a responsible body.
- (3) This paragraph is subject to section 96(7).

SCHEDULE 14

Section 99

EDUCATIONAL CHARITIES AND ENDOWMENTS

*Educational charities*

- 1 (1) This paragraph applies to a trust deed or other instrument—
- (a) which concerns property applicable for or in connection with the provision of education in an establishment in England and Wales to which section 85 or 91 applies, and
  - (b) which in any way restricts the benefits available under the instrument to persons of one sex.
- (2) Sub-paragraph (3) applies if, on the application of the trustees or the responsible body (within the meaning of that section), a Minister of the



Crown is satisfied that the removal or modification of the restriction would be conducive to the advancement of education without sex discrimination.

- (3) The Minister may by order make such modifications of the instrument as appear to the Minister expedient for removing or modifying the restriction.
- (4) If the trust was created by a gift or bequest, an order must not be made until the end of the period of 25 years after the date when the gift or bequest took effect.
- (5) Sub-paragraph (4) does not apply if the donor or the personal representatives of the donor or testator consent in writing to making the application for the order.
- (6) The Minister must require the applicant to publish a notice –
  - (a) containing particulars of the proposed order;
  - (b) stating that representations may be made to the Minister within a period specified in the notice.
- (7) The period must be not less than one month beginning with the day after the date of the notice.
- (8) The applicant must publish the notice in the manner specified by the Minister.
- (9) The cost of publication may be paid out of the property of the trust.
- (10) Before making the order, the Minister must take account of representations made in accordance with the notice.

#### *Educational endowments*

- 2 (1) This paragraph applies to an educational endowment –
  - (a) to which section 104 of the Education (Scotland) Act 1980 applies, and
  - (b) which in any way restricts the benefit of the endowment to persons of one sex.
- (2) Sub-paragraph (3) applies if, on the application of the governing body of an educational endowment, the Scottish Ministers are satisfied that the removal or modification of the provision which restricts the benefit of the endowment to persons of one sex would be conducive to the advancement of education without sex discrimination.
- (3) The Scottish Ministers may by order make such provision as they think expedient for removing or modifying the restriction.
- (4) If the Scottish Ministers propose to make such an order they must publish a notice in such manner as they think sufficient for giving information to persons they think may be interested in the endowment –
  - (a) containing particulars of the proposed order;
  - (b) stating that representations may be made with respect to the proposal within such period as is specified in the notice.
- (5) The period must be not less than one month beginning with the day after the date of publication of the notice.

- (6) The cost of publication is to be paid out of the funds of the endowment to which the notice relates.
- (7) Before making an order, the Scottish Ministers –
  - (a) must consider representations made in accordance with the notice;
  - (b) may cause a local inquiry to be held into the representations under section 67 of the Education (Scotland) Act 1980.
- (8) A reference to an educational endowment includes a reference to –
  - (a) a scheme made or approved for the endowment under Part 6 of the Education (Scotland) Act 1980;
  - (b) in the case of an endowment the governing body of which is entered in the Scottish Charity Register, a scheme approved for the endowment under section 39 or 40 of the Charities and Trustee Investment (Scotland) Act 2005 (asp 10);
  - (c) an endowment which is, by virtue of section 108(1) of the Education (Scotland) Act 1980, treated as if it were an educational endowment (or which would, but for the disapplication of that section by section 122(4) of that Act, be so treated);
  - (d) a university endowment, the Carnegie Trust, a theological endowment and a new endowment.
- (9) Expressions used in this paragraph and in Part 6 of the Education (Scotland) Act 1980 have the same meaning in this paragraph as in that Part.

## SCHEDULE 15

Section 107

## ASSOCIATIONS: REASONABLE ADJUSTMENTS

*Preliminary*

- 1 This Schedule applies where a duty to make reasonable adjustments is imposed on an association (A) by this Part.

*The duty*

- 2 (1) A must comply with the first, second and third requirements.
- (2) For the purposes of this paragraph, the reference in section 20(3), (4) or (5) to a disabled person is a reference to disabled persons who –
  - (a) are, or are seeking to become or might wish to become, members,
  - (b) are associates, or
  - (c) are, or are likely to become, guests.
- (3) Section 20 has effect as if, in subsection (4), for “to avoid the disadvantage” there were substituted –
  - “(a) to avoid the disadvantage, or
  - (b) to adopt a reasonable alternative method of affording access to the benefit, facility or service or of admitting persons to membership or inviting persons as guests.”
- (4) In relation to the first and third requirements, the relevant matters are –
  - (a) access to a benefit, facility or service;



- (b) members' or associates' retaining their rights as such or avoiding having them varied;
  - (c) being admitted to membership or invited as a guest.
- (5) In relation to the second requirement, the relevant matters are –
- (a) access to a benefit, facility or service;
  - (b) being admitted to membership or invited as a guest.
- (6) In relation to the second requirement, a physical feature includes a physical feature brought by or on behalf of A, in the course of or for the purpose of providing a benefit, facility or service, on to premises other than those that A occupies (as well as including a physical feature in or on premises that A occupies).
- (7) Nothing in this paragraph requires A to take a step which would fundamentally alter –
- (a) the nature of the benefit, facility or service concerned, or
  - (b) the nature of the association.
- (8) Nor does anything in this paragraph require a member or associate in whose house meetings of the association take place to make adjustments to a physical feature of the house.

## SCHEDULE 16

Section 107

## ASSOCIATIONS: EXCEPTIONS

*Single characteristic associations*

- 1 (1) An association does not contravene section 101(1) by restricting membership to persons who share a protected characteristic.
- (2) An association that restricts membership to persons who share a protected characteristic does not breach section 101(3) by restricting the access by associates to a benefit, facility or service to such persons as share the characteristic.
- (3) An association that restricts membership to persons who share a protected characteristic does not breach section 102(1) by inviting as guests, or by permitting to be invited as guests, only such persons as share the characteristic.
- (4) Sub-paragraphs (1) to (3), so far as relating to race, do not apply in relation to colour.
- (5) This paragraph does not apply to an association that is a registered political party.

*Health and safety*

- 2 (1) An association (A) does not discriminate against a pregnant woman in contravention of section 101(1)(b) because she is pregnant if –
- (a) the terms on which A is prepared to admit her to membership include a term intended to remove or reduce a risk to her health or safety,

- 
- (b) A reasonably believes that admitting her to membership on terms which do not include that term would create a risk to her health or safety,
  - (c) the terms on which A is prepared to admit persons with other physical conditions to membership include a term intended to remove or reduce a risk to their health or safety, and
  - (d) A reasonably believes that admitting them to membership on terms which do not include that term would create a risk to their health or safety.
- (2) Sub-paragraph (1) applies to section 102(1)(b) as it applies to section 101(1)(b); and for that purpose a reference to admitting a person to membership is to be read as a reference to inviting the person as a guest or permitting the person to be invited as a guest.
- (3) An association (A) does not discriminate against a pregnant woman in contravention of section 101(2)(a) or (3)(a) or 102(2)(a) because she is pregnant if –
- (a) the way in which A affords her access to a benefit, facility or service is intended to remove or reduce a risk to her health or safety,
  - (b) A reasonably believes that affording her access to the benefit, facility or service otherwise than in that way would create a risk to her health or safety,
  - (c) A affords persons with other physical conditions access to the benefit, facility or service in a way that is intended to remove or reduce a risk to their health or safety, and
  - (d) A reasonably believes that affording them access to the benefit, facility or service otherwise than in that way would create a risk to their health or safety.
- (4) An association (A) which does not afford a pregnant woman access to a benefit, facility or service does not discriminate against her in contravention of section 101(2)(a) or (3)(a) or 102(2)(a) because she is pregnant if –
- (a) A reasonably believes that affording her access to the benefit, facility or service would, because she is pregnant, create a risk to her health or safety,
  - (b) A does not afford persons with other physical conditions access to the benefit, facility or service, and
  - (c) the reason for not doing so is that A reasonably believes that affording them access to the benefit, facility or service would create a risk to their health or safety.
- (5) An association (A) does not discriminate against a pregnant woman under section 101(2)(c) or (3)(c) because she is pregnant if –
- (a) the variation of A's terms of membership, or rights as an associate, is intended to remove or reduce a risk to her health or safety,
  - (b) A reasonably believes that not making the variation to A's terms or rights would create a risk to her health or safety,
  - (c) A varies the terms of membership, or rights as an associate, of persons with other physical conditions,
  - (d) the variation of their terms or rights is intended to remove or reduce a risk to their health or safety, and
  - (e) A reasonably believes that not making the variation to their terms or rights would create a risk to their health or safety.

## SCHEDULE 17

Section 116

## DISABLED PUPILS: ENFORCEMENT

## PART 1

## INTRODUCTORY

- 1 In this Schedule –
- “the Tribunal” means –
- (a) in relation to a school in England, the First-tier Tribunal;
  - (b) in relation to a school in Wales, the Special Educational Needs Tribunal for Wales;
  - (c) in relation to a school in Scotland, an Additional Support Needs Tribunal for Scotland;
- “the English Tribunal” means the First-tier Tribunal;
- “the Welsh Tribunal” means the Special Educational Needs Tribunal for Wales;
- “the Scottish Tribunal” means an Additional Support Needs Tribunal for Scotland;
- “responsible body” is to be construed in accordance with section 85.

## PART 2

## TRIBUNALS IN ENGLAND AND WALES

*Introductory*

- 2 This Part of this Schedule applies in relation to the English Tribunal and the Welsh Tribunal.

*Jurisdiction*

- 3 A claim that a responsible body has contravened Chapter 1 of Part 6 because of a person’s disability may be made to the Tribunal by the person’s parent.

*Time for bringing proceedings*

- 4 (1) Proceedings on a claim may not be brought after the end of the period of 6 months starting with the date when the conduct complained of occurred.
- (2) If, in relation to proceedings or prospective proceedings under section 27 of the Equality Act 2006, the dispute is referred for conciliation in pursuance of arrangements under that section before the end of that period, the period is extended by 3 months.
- (3) The Tribunal may consider a claim which is out of time.
- (4) Sub-paragraph (3) does not apply if the Tribunal has previously decided under that sub-paragraph not to consider a claim.
- (5) For the purposes of sub-paragraph (1) –
- (a) if the contravention is attributable to a term in a contract, the conduct is to be treated as extending throughout the duration of the contract;

- (b) conduct extending over a period is to be treated as occurring at the end of the period;
  - (c) failure to do something is to be treated as occurring when the person in question decided on it.
- (6) In the absence of evidence to the contrary, a person (P) is to be taken to decide on failure to do something –
- (a) when P acts inconsistently with doing it, or
  - (b) if P does not act inconsistently, on the expiry of the period in which P might reasonably have been expected to do it.

#### *Powers*

- 5 (1) This paragraph applies if the Tribunal finds that the contravention has occurred.
- (2) The Tribunal may make such order as it thinks fit.
- (3) The power under sub-paragraph (2) –
- (a) may, in particular, be exercised with a view to obviating or reducing the adverse effect on the person of any matter to which the claim relates;
  - (b) does not include power to order the payment of compensation.

#### *Procedure*

- 6 (1) This paragraph applies in relation to the Welsh Tribunal.
- (2) The Welsh Ministers may by regulations make provision as to –
- (a) the proceedings on a claim under paragraph 3;
  - (b) the making of a claim.
- (3) The regulations may, in particular, include provision –
- (a) as to the manner in which a claim must be made;
  - (b) for enabling functions relating to preliminary or incidental matters (including in particular a decision under paragraph 4(3) to be performed by the President or by the person occupying the chair);
  - (c) enabling hearings to be conducted in the absence of a member other than the person occupying the chair;
  - (d) as to persons who may appear on behalf of the parties;
  - (e) for granting such rights to disclosure or inspection of documents or to further particulars as may be granted by the county court;
  - (f) requiring persons to attend to give evidence and produce documents;
  - (g) for authorising the administration of oaths to witnesses;
  - (h) for deciding claims without a hearing in prescribed circumstances;
  - (i) as to the withdrawal of claims;
  - (j) for enabling the Tribunal to stay proceedings;
  - (k) for the award of costs or expenses;
  - (l) for settling costs or expenses (and, in particular, for enabling costs to be assessed in the county court);
  - (m) for the registration and proof of decisions and orders;

- (n) for enabling prescribed decisions to be reviewed, or prescribed orders to be varied or revoked, in such circumstances as may be decided in accordance with the regulations.
- (4) Proceedings must be held in private, except in prescribed circumstances.
- (5) The Welsh Ministers may pay such allowances for the purpose of or in connection with the attendance of persons at the Tribunal as they may decide.
- (6) Part 1 of the Arbitration Act 1996 does not apply to the proceedings, but regulations may make provision in relation to such proceedings that corresponds to a provision of that Part.
- (7) The regulations may make provision for a claim to be heard, in prescribed circumstances, with an appeal under Part 4 of the Education Act 1996 (special educational needs).
- (8) A person commits an offence by failing to comply with—
  - (a) a requirement in respect of the disclosure or inspection of documents imposed by virtue of sub-paragraph (3)(e), or
  - (b) a requirement imposed by virtue of sub-paragraph (3)(f).
- (9) A person guilty of the offence is liable on summary conviction to a fine not exceeding level 3 on the standard scale.

### PART 3

#### TRIBUNALS IN SCOTLAND

##### *Introductory*

- 7 This Part of this Schedule applies in relation to the Scottish Tribunal.

##### *Jurisdiction*

- 8 A claim that a responsible body has contravened Chapter 1 of Part 6 because of a person's disability may be made to the Tribunal by—
- (a) the person's parent;
  - (b) where the person has capacity to make the claim, the person.

##### *Powers*

- 9 (1) This paragraph applies if the Tribunal finds the contravention has occurred.
- (2) The Tribunal may make such order as it thinks fit.
- (3) The power under sub-paragraph (2)—
- (a) may, in particular, be exercised with a view to obviating or reducing the adverse effect on the person of any matter to which the claim relates;
  - (b) does not include power to order the payment of compensation.

##### *Procedure etc.*

- 10 (1) The Scottish Ministers may make rules as to—
- (a) the proceedings on a claim under paragraph 8;

- (b) the making of a claim.
- (2) The rules may, in particular, include provision for or in connection with—
- (a) the form and manner in which a claim must be made;
  - (b) the time within which a claim is to be made;
  - (c) the withdrawal of claims;
  - (d) the recovery and inspection of documents;
  - (e) the persons who may appear on behalf of the parties;
  - (f) the persons who may be present at proceedings alongside any party or witness to support the party or witness;
  - (g) enabling specified persons other than the parties to appear or be represented in specified circumstances;
  - (h) requiring specified persons to give notice to other specified persons of specified matters;
  - (i) the time within which any such notice must be given;
  - (j) enabling Tribunal proceedings to be conducted in the absence of any member of a Tribunal other than the convener;
  - (k) enabling any matters that are preliminary or incidental to the determination of proceedings to be determined by the convener of a Tribunal alone or with such other members of the Tribunal as may be specified;
  - (l) enabling Tribunals to be held in private;
  - (m) enabling a Tribunal to exclude any person from attending all or part of Tribunal proceedings;
  - (n) enabling a Tribunal to impose reporting restrictions in relation to all or part of Tribunal proceedings;
  - (o) enabling a Tribunal to determine specified matters without holding a hearing;
  - (p) the recording and publication of decisions and orders of a Tribunal;
  - (q) enabling a Tribunal to commission medical and other reports in specified circumstances;
  - (r) requiring a Tribunal to take specified actions, or to determine specified proceedings, within specified periods;
  - (s) enabling a Tribunal to make an award of expenses;
  - (t) the taxation or assessment of such expenses;
  - (u) enabling a Tribunal, in specified circumstances, to review, or to vary or revoke, any of its decisions, orders or awards;
  - (v) enabling a Tribunal, in specified circumstances, to review the decisions, orders or awards of another Tribunal and take such action (including variation and revocation) in respect of those decisions, orders or awards as it thinks fit.

### *Appeals*

- 11 (1) Either of the persons specified in sub-paragraph (2) may appeal on a point of law to the Court of Session against a decision of a Tribunal relating to a claim under this Schedule.
- (2) Those persons are—
- (a) the person who made the claim;
  - (b) the responsible body.



- (3) Where the Court of Session allows an appeal under sub-paragraph (1) it may –
- (a) remit the reference back to the Tribunal or to a differently constituted Tribunal to be considered again and give the Tribunal such directions about the consideration of the case as the Court thinks fit;
  - (b) make such ancillary orders as it considers necessary or appropriate.

*Amendment of Education (Additional Support for Learning) (Scotland) Act 2004*

- 12 The Education (Additional Support for Learning) (Scotland) Act 2004 (asp 4) is amended as follows –
- (a) in section 17(1), omit “to exercise the functions which are conferred on a Tribunal by virtue of this Act”;
  - (b) after section 17(1), insert –
 

“(1A) Tribunals are to exercise the functions which are conferred on them by virtue of –

    - (a) this Act, and
    - (b) the Equality Act 2010”;
  - (c) in the definition of “Tribunal functions” in paragraph 1 of Schedule 1, after “Act” insert “or the Equality Act 2010”.

PART 4

ADMISSIONS AND EXCLUSIONS

*Admissions*

- 13 (1) This paragraph applies if appeal arrangements have been made in relation to admissions decisions.
- (2) A claim that a responsible body has, because of a person’s disability, contravened Chapter 1 of Part 6 in respect of an admissions decision must be made under the appeal arrangements.
- (3) The body hearing the claim has the powers it has in relation to an appeal under the appeal arrangements.
- (4) Appeal arrangements are arrangements under –
- (a) section 94 of the School Standards and Framework Act 1998, or
  - (b) an agreement between the responsible body for an Academy and the Secretary of State under section 482 of the Education Act 1996, enabling an appeal to be made by the person’s parent against the decision.
- (5) An admissions decision is –
- (a) a decision of a kind mentioned in section 94(1) or (2) of the School Standards and Framework Act 1998;
  - (b) a decision as to the admission of a person to an Academy taken by the responsible body or on its behalf.

*Exclusions*

- 14 (1) This paragraph applies if appeal arrangements have been made in relation to exclusion decisions.



- (2) A claim that a responsible body has, because of a person’s disability, contravened Chapter 1 of Part 6 in respect of an exclusion decision must be made under the appeal arrangements.
- (3) The body hearing the claim has the powers it has in relation to an appeal under the appeal arrangements.
- (4) Appeal arrangements are arrangements under –
  - (a) section 52(3) of the Education Act 2002, or
  - (b) an agreement between the responsible body for an Academy and the Secretary of State under section 482 of the Education Act 1996, enabling an appeal to be made by the person’s parent against the decision.
- (5) An exclusion decision is –
  - (a) a decision of a kind mentioned in 52(3) of the Education Act 2002;
  - (b) a decision taken by the responsible body or on its behalf not to reinstate a pupil who has been permanently excluded from an Academy by its head teacher.
- (6) “Responsible body”, in relation to a maintained school, includes the discipline committee of the governing body if that committee is required to be established as a result of regulations made under section 19 of the Education Act 2002.
- (7) “Maintained school” has the meaning given in section 20(7) of the School Standards and Framework Act 1998.

## SCHEDULE 18

Section 149

### PUBLIC SECTOR EQUALITY DUTY: EXCEPTIONS

#### *Children*

- 1 (1) Section 149, so far as relating to age, does not apply to the exercise of a function relating to –
  - (a) the provision of education to pupils in schools;
  - (b) the provision of benefits, facilities or services to pupils in schools;
  - (c) the provision of accommodation, benefits, facilities or services in community homes pursuant to section 53(1) of the Children Act 1989;
  - (d) the provision of accommodation, benefits, facilities or services pursuant to arrangements under section 82(5) of that Act (arrangements by the Secretary of State relating to the accommodation of children);
  - (e) the provision of accommodation, benefits, facilities or services in residential establishments pursuant to section 26(1)(b) of the Children (Scotland) Act 1995.
- (2) “Pupil” and “school” each have the same meaning as in Chapter 1 of Part 6.

*Immigration*

- 2 (1) In relation to the exercise of immigration and nationality functions, section 149 has effect as if subsection (1)(b) did not apply to the protected characteristics of age, race or religion or belief; but for that purpose “race” means race so far as relating to –
- (a) nationality, or
  - (b) ethnic or national origins.
- (2) “Immigration and nationality functions” means functions exercisable by virtue of –
- (a) the Immigration Acts (excluding sections 28A to 28K of the Immigration Act 1971 so far as they relate to criminal offences),
  - (b) the British Nationality Act 1981,
  - (c) the British Nationality (Falkland Islands) Act 1983,
  - (d) the British Nationality (Hong Kong) Act 1990,
  - (e) the Hong Kong (War Wives and Widows) Act 1996,
  - (f) the British Nationality (Hong Kong) Act 1997,
  - (g) the Special Immigration Appeals Commission Act 1997, or
  - (h) a provision made under section 2(2) of the European Communities Act 1972, or of Community law, which relates to the subject matter of an enactment within paragraphs (a) to (g).

*Judicial functions, etc.*

- 3 (1) Section 149 does not apply to the exercise of –
- (a) a judicial function;
  - (b) a function exercised on behalf of, or on the instructions of, a person exercising a judicial function.
- (2) The references to a judicial function include a reference to a judicial function conferred on a person other than a court or tribunal.

*Exceptions that are specific to section 149(2)*

- 4 (1) Section 149(2) (application of section 149(1) to persons who are not public authorities but by whom public functions are exercisable) does not apply to –
- (a) a person listed in sub-paragraph (2);
  - (b) the exercise of a function listed in sub-paragraph (3).
- (2) Those persons are –
- (a) the House of Commons;
  - (b) the House of Lords;
  - (c) the Scottish Parliament;
  - (d) the National Assembly for Wales;
  - (e) the General Synod of the Church of England;
  - (f) the Security Service;
  - (g) the Secret Intelligence Service;
  - (h) the Government Communications Headquarters;

- (i) a part of the armed forces which is, in accordance with a requirement of the Secretary of State, assisting the Government Communications Headquarters.
- (3) Those functions are –
  - (a) a function in connection with proceedings in the House of Commons or the House of Lords;
  - (b) a function in connection with proceedings in the Scottish Parliament (other than a function of the Scottish Parliamentary Corporate Body);
  - (c) a function in connection with proceedings in the National Assembly for Wales (other than a function of the Assembly Commission).

*Power to amend Schedule*

- 5 (1) A Minister of the Crown may by order amend this Schedule so as to add, vary or omit an exception to section 149.
- (2) But provision by virtue of sub-paragraph (1) may not amend this Schedule –
  - (a) so as to omit an exception in paragraph 3;
  - (b) so as to omit an exception in paragraph 4(1) so far as applying for the purposes of paragraph 4(2)(a) to (e) or (3);
  - (c) so as to reduce the extent to which an exception referred to in paragraph (a) or (b) applies.

## SCHEDULE 19

Section 150

## PUBLIC AUTHORITIES

## PART 1

## PUBLIC AUTHORITIES: GENERAL

*Ministers of the Crown and government departments*

A Minister of the Crown.

A government department other than the Security Service, the Secret Intelligence Service or the Government Communications Headquarters.

*Armed forces*

Any of the armed forces other than any part of the armed forces which is, in accordance with a requirement of the Secretary of State, assisting the Government Communications Headquarters.

*National Health Service*

A Strategic Health Authority established under section 13 of the National Health Service Act 2006, or continued in existence by virtue of that section.

A Primary Care Trust established under section 18 of that Act, or continued in existence by virtue of that section.

- An NHS trust established under section 25 of that Act.
- A Special Health Authority established under section 28 of that Act other than NHS Blood and Transplant and the NHS Business Services Authority.
- An NHS foundation trust within the meaning given by section 30 of that Act.

*Local government*

- A county council, district council or parish council in England.
- A parish meeting constituted under section 13 of the Local Government Act 1972.
- Charter trustees constituted under section 246 of that Act for an area in England.
- The Greater London Authority.
- A London borough council.
- The Common Council of the City of London in its capacity as a local authority or port health authority.
- The Sub-Treasurer of the Inner Temple or the Under-Treasurer of the Middle Temple, in that person's capacity as a local authority.
- The London Development Agency.
- The London Fire and Emergency Planning Authority.
- Transport for London.
- The Council of the Isles of Scilly.
- The Broads Authority established by section 1 of the Norfolk and Suffolk Broads Act 1988.
- A regional development agency established by the Regional Development Agencies Act 1998 (other than the London Development Agency).
- A fire and rescue authority constituted by a scheme under section 2 of the Fire and Rescue Services Act 2004, or a scheme to which section 4 of that Act applies, for an area in England.
- An internal drainage board which is continued in being by virtue of section 1 of the Land Drainage Act 1991 for an area in England.
- A National Park authority established by an order under section 63 of the Environment Act 1995 for an area in England.
- A Passenger Transport Executive for an integrated transport area in England (within the meaning of Part 2 of the Transport Act 1968).
- A port health authority constituted by an order under section 2 of the Public Health (Control of Disease) Act 1984 for an area in England.
- A waste disposal authority established by virtue of an order under section 10(1) of the Local Government Act 1985.
- A joint authority established under Part 4 of that Act for an area in England (including, by virtue of section 77(9) of the Local Transport Act 2008, an Integrated Transport Authority established under Part 5 of that Act of 2008).
- A body corporate established pursuant to an order under section 67 of the Local Government Act 1985.
- A joint committee constituted in accordance with section 102(1)(b) of the Local Government Act 1972 for an area in England.

A joint board which is continued in being by virtue of section 263(1) of that Act for an area in England.

*Other educational bodies*

The governing body of an educational establishment maintained by an English local authority (within the meaning of section 162 of the Education and Inspections Act 2006).

The governing body of an institution in England within the further education sector (within the meaning of section 91(3) of the Further and Higher Education Act 1992).

The governing body of an institution in England within the higher education sector (within the meaning of section 91(5) of that Act).

*Police*

A police authority established under section 3 of the Police Act 1996.

The Metropolitan Police Authority established under section 5B of that Act.

The Common Council of the City of London in its capacity as a police authority.

PART 2

PUBLIC AUTHORITIES: RELEVANT WELSH AUTHORITIES

*Welsh Assembly Government, etc.*

The Welsh Ministers.

The First Minister for Wales.

The Counsel General to the Welsh Assembly Government.

A subsidiary of the Welsh Ministers (within the meaning given by section 134(4) of the Government of Wales Act 2006).

*National Health Service*

A Local Health Board established under section 11 of the National Health Service (Wales) Act 2006.

An NHS trust established under section 18 of that Act.

A Special Health Authority established under section 22 of that Act other than NHS Blood and Transplant and the NHS Business Services Authority.

A Community Health Council in Wales.

*Local government*

A county council, county borough council or community council in Wales.

Charter trustees constituted under section 246 of the Local Government Act 1972 for an area in Wales.

A fire and rescue authority constituted by a scheme under section 2 of the Fire and Rescue Services Act 2004, or a scheme to which section 4 of that Act applies, for an area in Wales.

An internal drainage board which is continued in being by virtue of section 1 of the Land Drainage Act 1991 for an area in Wales.

A National Park authority established by an order under section 63 of the Environment Act 1995 for an area in Wales.

A port health authority constituted by an order under section 2 of the Public Health (Control of Disease) Act 1984 for an area in Wales.

A joint authority established under Part 4 of the Local Government Act 1985 for an area in Wales.

A joint committee constituted in accordance with section 102(1)(b) of the Local Government Act 1972 for an area in Wales.

A joint board which is continued in being by virtue of section 263(1) of that Act for an area in Wales.

#### *Other educational bodies*

The governing body of an educational establishment maintained by a Welsh local authority (within the meaning of section 162 of the Education and Inspections Act 2006).

The governing body of an institution in Wales within the further education sector (within the meaning of section 91(3) of the Further and Higher Education Act 1992).

The governing body of an institution in Wales within the higher education sector (within the meaning of section 91(5) of that Act).

### PART 3

#### PUBLIC AUTHORITIES: RELEVANT SCOTTISH AUTHORITIES

#### *Scottish Administration*

An office-holder in the Scottish Administration (within the meaning given by section 126(7)(a) of the Scotland Act 1998).

#### *National Health Service*

A Health Board constituted under section 2 of the National Health Service (Scotland) Act 1978.

A Special Health Board constituted under that section.

#### *Local government*

A council constituted under section 2 of the Local Government etc. (Scotland) Act 1994.

A community council established under section 51 of the Local Government (Scotland) Act 1973.

A joint board within the meaning of section 235(1) of that Act.

A joint fire and rescue board constituted by a scheme under section 2(1) of the Fire (Scotland) Act 2005.

A licensing board established under section 5 of the Licensing (Scotland) Act 2005, or continued in being by virtue of that section.

A National Park authority established by a designation order made under section 6 of the National Parks (Scotland) Act 2000.



Scottish Enterprise and Highlands and Islands Enterprise, established under the Enterprise and New Towns (Scotland) Act 1990.

*Other educational bodies*

An education authority in Scotland (within the meaning of section 135(1) of the Education (Scotland) Act 1980).

The managers of a grant-aided school (within the meaning of that section).

The board of management of a college of further education (within the meaning of section 36(1) of the Further and Higher Education (Scotland) Act 1992).

In the case of such a college of further education not under the management of a board of management, the board of governors of the college or any person responsible for the management of the college, whether or not formally constituted as a governing body or board of governors.

The governing body of an institution within the higher education sector (within the meaning of Part 2 of the Further and Higher Education (Scotland) Act 1992).

*Police*

A police authority established under section 2 of the Police (Scotland) Act 1967.

SCHEDULE 20

Section 186

RAIL VEHICLE ACCESSIBILITY: COMPLIANCE

*Rail vehicle accessibility compliance certificates*

- 1 (1) A regulated rail vehicle which is prescribed, or is of a prescribed class or description, must not be used for carriage unless a compliance certificate is in force for the vehicle.
- (2) A “compliance certificate” is a certificate that the Secretary of State is satisfied that the regulated rail vehicle conforms with the provisions of rail vehicle accessibility regulations with which it is required to conform.
- (3) A compliance certificate is subject to such conditions as are specified in it.
- (4) A compliance certificate may not be issued for a rail vehicle unless the Secretary of State has been provided with a report of a compliance assessment of the vehicle.
- (5) A “compliance assessment” is an assessment of a rail vehicle against provisions of rail vehicle accessibility regulations with which the vehicle is required to conform.
- (6) If a regulated rail vehicle is used for carriage in contravention of subparagraph (1), the Secretary of State may require the operator of the vehicle to pay a penalty.



- (7) The Secretary of State must review a decision not to issue a compliance certificate if before the end of the prescribed period the applicant –
  - (a) asks the Secretary of State to review the decision, and
  - (b) pays any fee fixed under paragraph 4.
- (8) For the purposes of the review, the Secretary of State must consider any representations made by the applicant in writing before the end of the prescribed period.

*Regulations as to compliance certificates*

- 2 (1) Regulations may make provision as to compliance certificates.
- (2) The regulations may (in particular) include provision –
  - (a) as to applications for and issue of certificates;
  - (b) specifying conditions to which certificates are subject;
  - (c) as to the period for which a certificate is in force;
  - (d) as to circumstances in which a certificate ceases to be in force;
  - (e) dealing with failure to comply with a specified condition;
  - (f) for the examination of rail vehicles in respect of which applications have been made;
  - (g) with respect to the issue of copies of certificates in place of those which have been lost or destroyed.

*Regulations as to compliance assessments*

- 3 (1) Regulations may make provision as to compliance assessments.
- (2) The regulations –
  - (a) may make provision as to the person who has to have carried out the assessment;
  - (b) may (in particular) require that the assessment be one carried out by a person who has been appointed by the Secretary of State to carry out compliance assessments (an “appointed assessor”).
- (3) For the purposes of any provisions in the regulations made by virtue of subparagraph (2)(b), the regulations –
  - (a) may make provision about appointments of appointed assessors, including (in particular) –
    - (i) provision for an appointment to be on application or otherwise than on application;
    - (ii) provision as to who may be appointed;
    - (iii) provision as to the form of applications for appointment;
    - (iv) provision as to information to be supplied with applications for appointment;
    - (v) provision as to terms and conditions, or the period or termination, of an appointment;
    - (vi) provision for terms and conditions of an appointment, including any as to its period or termination, to be as agreed by the Secretary of State when making the appointment;
  - (b) may make provision authorising an appointed assessor to charge fees in connection with, or incidental to, the carrying out of a compliance assessment, including (in particular) –

- (i) provision restricting the amount of a fee;
  - (ii) provision authorising fees that contain a profit element;
  - (iii) provision for advance payment of fees;
- (c) may make provision requiring an appointed assessor to carry out a compliance assessment, and to do so in accordance with any procedures that may be prescribed, if prescribed conditions (which may include conditions as to the payment of fees to the assessor) are satisfied;
- (d) must make provision for the referral to the Secretary of State of disputes between—
- (i) an appointed assessor carrying out a compliance assessment, and
  - (ii) the person who requested the assessment,
- relating to which provisions of rail vehicle accessibility regulations the vehicle is to be assessed against or to what amounts to conformity with any of those provisions.
- (4) For the purposes of sub-paragraph (3)(b) to (d) a compliance assessment includes pre-assessment activities (for example, a consideration of how the outcome of a compliance assessment would be affected by the carrying out of particular proposed work).

*Fees in respect of compliance certificates*

- 4 (1) The Secretary of State may charge such fees, payable at such times, as are prescribed in respect of—
- (a) applications for, and the issue of, compliance certificates;
  - (b) copies of compliance certificates;
  - (c) reviews under paragraph 1(7);
  - (d) referrals of disputes under provision made by virtue of paragraph 3(3)(d).
- (2) Fees received by the Secretary of State must be paid into the Consolidated Fund.
- (3) Regulations under this paragraph may make provision for the repayment of fees, in whole or in part, in such circumstances as are prescribed.
- (4) Before making regulations under this paragraph the Secretary of State must consult such representative organisations as the Secretary of State thinks fit.

*Penalty for using rail vehicle that does not conform with accessibility regulations*

- 5 (1) If the Secretary of State thinks that a regulated rail vehicle does not conform with a provision of rail vehicle accessibility regulations with which it is required to conform, the Secretary of State may give the operator of the vehicle a notice—
- (a) identifying the vehicle, the provision and how the vehicle fails to conform;
  - (b) specifying the improvement deadline.
- (2) The improvement deadline may not be earlier than the end of the prescribed period beginning with the day the notice is given.
- (3) Sub-paragraph (4) applies if—

- (a) the Secretary of State has given a notice under sub-paragraph (1),
  - (b) the improvement deadline specified in the notice has passed, and
  - (c) the Secretary of State thinks that the vehicle still does not conform with the provision identified in the notice.
- (4) The Secretary of State may give the operator a further notice –
- (a) identifying the vehicle, the provision and how the vehicle fails to conform;
  - (b) specifying the final deadline.
- (5) The final deadline may not be earlier than the end of the prescribed period beginning with the day the further notice is given.
- (6) The Secretary of State may require the operator to pay a penalty if –
- (a) the Secretary of State has given notice under sub-paragraph (4), and
  - (b) the vehicle is used for carriage at a time after the final deadline when the vehicle does not conform with the provision identified in the notice.

*Penalty for using rail vehicle otherwise than in conformity with accessibility regulations*

- 6 (1) If the Secretary of State thinks that a regulated rail vehicle has been used for carriage otherwise than in conformity with a provision of rail vehicle accessibility regulations with which the use of the vehicle is required to conform, the Secretary of State may give the operator of the vehicle a notice –
- (a) identifying the provision and how it was breached;
  - (b) identifying each vehicle operated by the operator that is covered by the notice;
  - (c) specifying the improvement deadline.
- (2) The improvement deadline may not be earlier than the end of the prescribed period beginning with the day the notice is given.
- (3) Sub-paragraph (4) applies if –
- (a) the Secretary of State has given a notice under sub-paragraph (1),
  - (b) the improvement deadline specified in the notice has passed, and
  - (c) the Secretary of State thinks that a vehicle covered by the notice has after that deadline been used for carriage otherwise than in conformity with the provision identified in the notice.
- (4) The Secretary of State may give the operator a further notice –
- (a) identifying the provision and how it was breached;
  - (b) identifying each vehicle operated by the operator that is covered by the further notice;
  - (c) specifying the final deadline.
- (5) The final deadline may not be earlier than the end of the prescribed period beginning with the day the further notice is given.
- (6) The Secretary of State may require the operator to pay a penalty if –
- (a) the Secretary of State has given notice under sub-paragraph (4), and
  - (b) a vehicle covered by the notice is at a time after the final deadline used for carriage otherwise than in conformity with the provision identified in the notice.

*Inspection of rail vehicles*

- 7 (1) If the condition in sub-paragraph (2) is satisfied, a person authorised by the Secretary of State (an “inspector”) may inspect a regulated rail vehicle for conformity with provisions of the accessibility regulations with which it is required to conform.
- (2) The condition is that the Secretary of State –
- (a) has reasonable grounds for suspecting that the vehicle does not conform with such provisions, or
  - (b) has given a notice under paragraph 5(1) or (4) relating to the vehicle.
- (3) For the purpose of exercising the power under sub-paragraph (1) an inspector may –
- (a) enter premises if the inspector has reasonable grounds for suspecting that the vehicle is at the premises;
  - (b) enter the vehicle;
  - (c) require any person to afford such facilities and assistance with respect to matters under the person’s control as are necessary to enable the inspector to exercise the power.
- (4) An inspector must, if required to do so, produce evidence of the Secretary of State’s authorisation.
- (5) For the purposes of paragraph 5(1) the Secretary of State may draw such inferences as appear proper from any obstruction of the exercise of the power under sub-paragraph (1).
- (6) Sub-paragraphs (7) and (8) apply if the power under sub-paragraph (1) is exercisable by virtue of sub-paragraph (2)(b).
- (7) The Secretary of State may treat paragraph 5(3)(c) as satisfied in relation to a vehicle if –
- (a) the inspector takes steps to exercise the power after a notice is given under paragraph 5(1) but before a notice is given under paragraph 5(4), and
  - (b) a person obstructs the exercise of the power.
- (8) The Secretary of State may require the operator of a vehicle to pay a penalty if –
- (a) the operator, or a person acting on the operator’s behalf, intentionally obstructs the exercise of the power, and
  - (b) the obstruction occurs after a notice has been given under paragraph 5(4) in respect of the vehicle.
- (9) In this paragraph “inspect” includes test.

*Supplementary powers*

- 8 (1) For the purposes of paragraph 5 the Secretary of State may give notice to a person requiring the person to supply the Secretary of State by a time specified in the notice with a vehicle number or other identifier for a rail vehicle –
- (a) of which the person is the operator, and
  - (b) which is specified in the notice.

- (2) The time specified may not be earlier than the end of the period of 14 days beginning with the day the notice is given.
- (3) If the person does not comply with the notice, the Secretary of State may require the person to pay a penalty.
- (4) If the Secretary of State has given a notice to a person under paragraph 5(1) or 6(1), the Secretary of State may request the person to supply the Secretary of State, by a time specified in the request, with a statement detailing the steps taken in response to the notice.
- (5) The time specified may not be earlier than the improvement deadline.
- (6) The Secretary of State may treat paragraph 5(3)(c) or (as the case may be) paragraph 6(3)(c) as being satisfied in relation to a vehicle if a request under sub-paragraph (4) is not complied with by the time specified.

*Penalties: amount, due date and recovery*

- 9 (1) In this paragraph and paragraphs 10 to 12 “penalty” means a penalty under this Schedule.
- (2) The amount of a penalty must not exceed whichever is the lesser of—
  - (a) the maximum prescribed for the purposes of this sub-paragraph;
  - (b) 10% of the turnover of the person on whom it is imposed.
- (3) Turnover is to be determined by such means as are prescribed.
- (4) A penalty must be paid to the Secretary of State before the end of the prescribed period.
- (5) A sum payable as a penalty may be recovered as a debt due to the Secretary of State.
- (6) In proceedings for recovery of a penalty no question may be raised as to—
  - (a) liability to the penalty;
  - (b) its amount.
- (7) Sums paid to the Secretary of State as a penalty must be paid into the Consolidated Fund.

*Penalties: code of practice*

- 10 (1) The Secretary of State must issue a code of practice specifying matters to be considered in determining the amount of a penalty.
- (2) The Secretary of State may—
  - (a) revise the whole or part of the code;
  - (b) issue the code as revised.
- (3) Before issuing the code the Secretary of State must lay a draft of it before Parliament.
- (4) After laying the draft before Parliament, the Secretary of State may bring the code into operation by order.
- (5) The Secretary of State must have regard to the code and any other relevant matter—
  - (a) when imposing a penalty;

- (b) when considering an objection under paragraph 11.
- (6) In sub-paragraphs (3) to (5) a reference to the code includes a reference to the code as revised.

*Penalties: procedure*

- 11 (1) If the Secretary of State decides that a person is liable to a penalty the Secretary of State must notify the person.
- (2) The notification must –
- (a) state the Secretary of State’s reasons for the decision;
  - (b) state the amount of the penalty;
  - (c) specify the date by which and manner in which the penalty must be paid;
  - (d) explain how the person may object to the penalty.
- (3) The person may give the Secretary of State notice of objection to the penalty on the ground that –
- (a) the person is not liable to the penalty, or
  - (b) the amount of the penalty is too high.
- (4) A notice of objection must –
- (a) be in writing;
  - (b) give the reasons for the objection;
  - (c) be given before the end of the period prescribed for the purposes of this sub-paragraph.
- (5) On considering a notice of objection the Secretary of State may –
- (a) cancel the penalty;
  - (b) reduce the amount of the penalty;
  - (c) do neither of those things.
- (6) The Secretary of State must inform the objector of the decision under sub-paragraph (5) before the end of the period prescribed for the purposes of this sub-paragraph (or such longer period as is agreed with the objector).

*Penalties: appeals*

- 12 (1) A person may appeal to the court against a penalty on the ground that –
- (a) the person is not liable to the penalty;
  - (b) the amount of the penalty is too high.
- (2) The court may –
- (a) allow the appeal and cancel the penalty;
  - (b) allow the appeal and reduce the amount of the penalty;
  - (c) dismiss the appeal.
- (3) An appeal under this section is a re-hearing of the Secretary of State’s decision and is to be determined having regard to –
- (a) any code of practice under paragraph 10 which has effect at the time of the appeal;
  - (b) any other matter which the court thinks is relevant (whether or not the Secretary of State was aware of it).



- (4) An appeal may be brought under this section whether or not –
  - (a) the person has given notice of objection under paragraph 11(3);
  - (b) the penalty has been reduced under paragraph 11(5).
- (5) In this section “the court” is –
  - (a) in England and Wales, a county court;
  - (b) in Scotland, the sheriff.
- (6) The sheriff may transfer the proceedings to the Court of Session.
- (7) If the sheriff makes a determination under sub-paragraph (2), a party to the proceedings may appeal against the determination on a point of law to –
  - (a) the Sheriff Principal, or
  - (b) the Court of Session.

*Forgery, etc.*

- 13 (1) Section 188 has effect –
  - (a) as if a compliance certificate were a “relevant document”;
  - (b) as if subsection (4) included a reference to a compliance certificate.
- (2) A person commits an offence by pretending, with intent to deceive, to be a person authorised to exercise a power under paragraph 7.
- (3) A person guilty of an offence under sub-paragraph (2) is liable on summary conviction to a fine not exceeding level 4 on the standard scale.

*Regulations*

- 14 A power to make regulations under this Schedule is exercisable by the Secretary of State.

*Interpretation*

- 15 (1) In this Schedule –
  - “compliance assessment” has the meaning given in paragraph 1(5);
  - “compliance certificate” has the meaning given in paragraph 1(2);
  - “operator”, in relation to a rail vehicle, means the person having the management of the vehicle.
- (2) If an exemption order under section 183 authorises the use of a rail vehicle even though the vehicle does not conform with a provision of rail vehicle accessibility regulations, a reference in this Schedule to provisions of rail vehicle accessibility regulations with which the vehicle is required to conform does not, in relation to the vehicle, include a reference to that provision.



## SCHEDULE 21

Section 189

## REASONABLE ADJUSTMENTS: SUPPLEMENTARY

*Preliminary*

- 1 This Schedule applies for the purposes of Schedules 2, 4, 8, 13 and 15.

*Binding obligations, etc.*

- 2 (1) This paragraph applies if—
- (a) a binding obligation requires A to obtain the consent of another person to an alteration of premises which A occupies,
  - (b) where A is a controller of let premises, a binding obligation requires A to obtain the consent of another person to a variation of a term of the tenancy, or
  - (c) where A is a responsible person in relation to common parts, a binding obligation requires A to obtain the consent of another person to an alteration of the common parts.
- (2) For the purpose of discharging a duty to make reasonable adjustments—
- (a) it is always reasonable for A to have to take steps to obtain the consent, but
  - (b) it is never reasonable for A to have to make the alteration before the consent is obtained.
- (3) In this Schedule, a binding obligation is a legally binding obligation in relation to premises, however arising; but the reference to a binding obligation in sub-paragraph (1)(a) or (c) does not include a reference to an obligation imposed by a tenancy.
- (4) The steps referred to in sub-paragraph (2)(a) do not include applying to a court or tribunal.

*Landlord's consent*

- 3 (1) This paragraph applies if—
- (a) A occupies premises under a tenancy,
  - (b) A is proposing to make an alteration to the premises so as to comply with a duty to make reasonable adjustments, and
  - (c) but for this paragraph, A would not be entitled to make the alteration.
- (2) This paragraph also applies if—
- (a) A is a responsible person in relation to common parts,
  - (b) A is proposing to make an alteration to the common parts so as to comply with a duty to make reasonable adjustments,
  - (c) A is the tenant of property which includes the common parts, and
  - (d) but for this paragraph, A would not be entitled to make the alteration.
- (3) The tenancy has effect as if it provided—
- (a) for A to be entitled to make the alteration with the written consent of the landlord,

- (b) for A to have to make a written application for that consent,
  - (c) for the landlord not to withhold the consent unreasonably, and
  - (d) for the landlord to be able to give the consent subject to reasonable conditions.
- (4) If a question arises as to whether A has made the alteration (and, accordingly, complied with a duty to make reasonable adjustments), any constraint attributable to the tenancy must be ignored unless A has applied to the landlord in writing for consent to the alteration.
- (5) For the purposes of sub-paragraph (1) or (2), A must be treated as not entitled to make the alteration if the tenancy –
- (a) imposes conditions which are to apply if A makes an alteration, or
  - (b) entitles the landlord to attach conditions to a consent to the alteration.

*Proceedings before county court or sheriff*

- 4 (1) This paragraph applies if, in a case within Part 3, 4, 6 or 7 of this Act –
- (a) A has applied in writing to the landlord for consent to the alteration, and
  - (b) the landlord has refused to give consent or has given consent subject to a condition.
- (2) A (or a disabled person with an interest in the alteration being made) may refer the matter to a county court or, in Scotland, the sheriff.
- (3) The county court or sheriff must determine whether the refusal or condition is unreasonable.
- (4) If the county court or sheriff finds that the refusal or condition is unreasonable, the county court or sheriff –
- (a) may make such declaration as it thinks appropriate;
  - (b) may make an order authorising A to make the alteration specified in the order (and requiring A to comply with such conditions as are so specified).

*Joining landlord as party to proceedings*

- 5 (1) This paragraph applies to proceedings relating to a contravention of this Act by virtue of section 20.
- (2) A party to the proceedings may request the employment tribunal, county court or sheriff (“the judicial authority”) to direct that the landlord is joined or sisted as a party to the proceedings.
- (3) The judicial authority –
- (a) must grant the request if it is made before the hearing of the complaint or claim begins;
  - (b) may refuse the request if it is made after the hearing begins;
  - (c) must refuse the request if it is made after the complaint or claim has been determined.
- (4) If the landlord is joined or sisted as a party to the proceedings, the judicial authority may determine whether –
- (a) the landlord has refused to consent to the alteration;

- (b) the landlord has consented subject to a condition;
  - (c) the refusal or condition was unreasonable.
- (5) If the judicial authority finds that the refusal or condition was unreasonable, it –
- (a) may make such declaration as it thinks appropriate;
  - (b) may make an order authorising A to make the alteration specified in the order (and requiring A to comply with such conditions as are so specified);
  - (c) may order the landlord to pay compensation to the complainant or claimant.
- (6) An employment tribunal may act in reliance on sub-paragraph (5)(c) instead of, or in addition to, acting in reliance on section 124(2); but if it orders the landlord to pay compensation it must not do so in reliance on section 124(2).
- (7) If a county court or the sheriff orders the landlord to pay compensation, it may not order A to do so.

### *Regulations*

- 6 (1) Regulations may make provision as to circumstances in which a landlord is taken for the purposes of this Schedule to have –
- (a) withheld consent;
  - (b) withheld consent reasonably;
  - (c) withheld consent unreasonably.
- (2) Regulations may make provision as to circumstances in which a condition subject to which a landlord gives consent is taken –
- (a) to be reasonable;
  - (b) to be unreasonable.
- (3) Regulations may make provision supplementing or modifying the preceding paragraphs of this Schedule, or provision made under this paragraph, in relation to a case where A's tenancy is a sub-tenancy.
- (4) Provision made by virtue of this paragraph may amend the preceding paragraphs of this Schedule.

### *Interpretation*

- 7 An expression used in this Schedule and in Schedule 2, 4, 8, 13 or 15 has the same meaning in this Schedule as in that Schedule.

## SCHEDULE 22

Section 191

### STATUTORY PROVISIONS

### *Statutory authority*

- 1 (1) A person (P) does not contravene a provision specified in the first column of the table, so far as relating to the protected characteristic specified in the second column in respect of that provision, if P does anything P must do pursuant to a requirement specified in the third column.

<i>Specified provision</i>	<i>Protected characteristic</i>	<i>Requirement</i>
Parts 3 to 7	Age	A requirement of an enactment
Parts 3 to 7 and 12	Disability	A requirement of an enactment A relevant requirement or condition imposed by virtue of an enactment
Parts 3 to 7	Religion or belief	A requirement of an enactment A relevant requirement or condition imposed by virtue of an enactment
Section 29(6) and Parts 6 and 7	Sex	A requirement of an enactment
Parts 3, 4, 6 and 7	Sexual orientation	A requirement of an enactment A relevant requirement or condition imposed by virtue of an enactment

- (2) A reference in the table to Part 6 does not include a reference to that Part so far as relating to vocational training.
- (3) In this paragraph a reference to an enactment includes a reference to—
- (a) a Measure of the General Synod of the Church of England;
  - (b) an enactment passed or made on or after the date on which this Act is passed.
- (4) In the table, a relevant requirement or condition is a requirement or condition imposed (whether before or after the passing of this Act) by—
- (a) a Minister of the Crown;
  - (b) a member of the Scottish Executive;
  - (c) the National Assembly for Wales (constituted by the Government of Wales Act 1998);
  - (d) the Welsh Ministers, the First Minister for Wales or the Counsel General to the Welsh Assembly Government.

#### *Protection of women*

- 2 (1) A person (P) does not contravene a specified provision only by doing in relation to a woman (W) anything P is required to do to comply with—
- (a) a pre-1975 Act enactment concerning the protection of women;
  - (b) a relevant statutory provision (within the meaning of Part 1 of the Health and Safety at Work etc. Act 1974) if it is done for the purpose of the protection of W (or a description of women which includes W);

- (c) a requirement of a provision specified in Schedule 1 to the Employment Act 1989 (provisions concerned with protection of women at work).
- (2) The references to the protection of women are references to protecting women in relation to—
  - (a) pregnancy or maternity, or
  - (b) any other circumstances giving rise to risks specifically affecting women.
- (3) It does not matter whether the protection is restricted to women.
- (4) These are the specified provisions—
  - (a) Part 5 (work);
  - (b) Part 6 (education), so far as relating to vocational training.
- (5) A pre-1975 Act enactment is an enactment contained in—
  - (a) an Act passed before the Sex Discrimination Act 1975;
  - (b) an instrument approved or made by or under such an Act (including one approved or made after the passing of the 1975 Act).
- (6) If an Act repeals and re-enacts (with or without modification) a pre-1975 enactment then the provision re-enacted must be treated as being in a pre-1975 enactment.
- (7) For the purposes of sub-paragraph (1)(c), a reference to a provision in Schedule 1 to the Employment Act 1989 includes a reference to a provision for the time being having effect in place of it.
- (8) This paragraph applies only to the following protected characteristics—
  - (a) pregnancy and maternity;
  - (b) sex.

*Educational appointments, etc: religious belief*

- 3 (1) A person does not contravene Part 5 (work) only by doing a relevant act in connection with the employment of another in a relevant position.
- (2) A relevant position is—
  - (a) the head teacher or principal of an educational establishment;
  - (b) the head, a fellow or other member of the academic staff of a college, or institution in the nature of a college, in a university;
  - (c) a professorship of a university which is a canon professorship or one to which a canonry is annexed.
- (3) A relevant act is anything it is necessary to do to comply with—
  - (a) a requirement of an instrument relating to the establishment that the head teacher or principal must be a member of a particular religious order;
  - (b) a requirement of an instrument relating to the college or institution that the holder of the position must be a woman;
  - (c) an Act or instrument in accordance with which the professorship is a canon professorship or one to which a canonry is annexed.

- (4) Sub-paragraph (3)(b) does not apply to an instrument taking effect on or after 16 January 1990 (the day on which section 5(3) of the Employment Act 1989 came into force).
- (5) A Minister of the Crown may by order provide that anything in sub-paragraphs (1) to (3) does not have effect in relation to –
- (a) a specified educational establishment or university;
  - (b) a specified description of educational establishments.
- (6) An educational establishment is –
- (a) a school within the meaning of the Education Act 1996 or the Education (Scotland) Act 1980;
  - (b) a college, or institution in the nature of a college, in a university;
  - (c) an institution designated by order made, or having effect as if made, under section 129 of the Education Reform Act 1988;
  - (d) a college of further education within the meaning of section 36 of the Further and Higher Education (Scotland) Act 1992;
  - (e) a university in Scotland;
  - (f) an institution designated by order under section 28 of the Further and Higher Education Act 1992 or section 44 of the Further and Higher Education (Scotland) Act 1992.
- (7) This paragraph does not affect paragraph 2 of Schedule 9.
- 4 A person does not contravene this Act only by doing anything which is permitted for the purposes of –
- (a) section 58(6) or (7) of the School Standards and Framework Act 1998 (dismissal of teachers because of failure to give religious education efficiently);
  - (b) section 60(4) and (5) of that Act (religious considerations relating to certain appointments);
  - (c) section 124A of that Act (preference for certain teachers at independent schools of a religious character).

*Crown employment, etc.*

- 5 (1) A person does not contravene this Act –
- (a) by making or continuing in force rules mentioned in sub-paragraph (2);
  - (b) by publishing, displaying or implementing such rules;
  - (c) by publishing the gist of such rules.
- (2) The rules are rules restricting to persons of particular birth, nationality, descent or residence –
- (a) employment in the service of the Crown;
  - (b) employment by a prescribed public body;
  - (c) holding a public office (within the meaning of section 50).
- (3) The power to make regulations for the purpose of sub-paragraph (2)(b) is exercisable by the Minister for the Civil Service.
- (4) In this paragraph “public body” means a body (whether corporate or unincorporated) exercising public functions (within the meaning given by section 31(4)).



## SCHEDULE 23

Section 196

## GENERAL EXCEPTIONS

*Acts authorised by statute or the executive*

- 1 (1) This paragraph applies to anything done—
  - (a) in pursuance of an enactment;
  - (b) in pursuance of an instrument made by a member of the executive under an enactment;
  - (c) to comply with a requirement imposed (whether before or after the passing of this Act) by a member of the executive by virtue of an enactment;
  - (d) in pursuance of arrangements made (whether before or after the passing of this Act) by or with the approval of, or for the time being approved by, a Minister of the Crown;
  - (e) to comply with a condition imposed (whether before or after the passing of this Act) by a Minister of the Crown.
- (2) A person does not contravene Part 3, 4, 5 or 6 by doing anything to which this paragraph applies which discriminates against another because of the other's nationality.
- (3) A person (A) does not contravene Part 3, 4, 5 or 6 if, by doing anything to which this paragraph applies, A discriminates against another (B) by applying to B a provision, criterion or practice which relates to—
  - (a) B's place of ordinary residence;
  - (b) the length of time B has been present or resident in or outside the United Kingdom or an area within it.

*Organisations relating to religion or belief*

- 2 (1) This paragraph applies to an organisation the purpose of which is—
  - (a) to practise a religion or belief,
  - (b) to advance a religion or belief,
  - (c) to teach the practice or principles of a religion or belief,
  - (d) to enable persons of a religion or belief to receive any benefit, or to engage in any activity, within the framework of that religion or belief, or
  - (e) to foster or maintain good relations between persons of different religions or beliefs.
- (2) This paragraph does not apply to an organisation whose sole or main purpose is commercial.
- (3) The organisation does not contravene Part 3, 4 or 7, so far as relating to religion or belief or sexual orientation, only by restricting—
  - (a) membership of the organisation;
  - (b) participation in activities undertaken by the organisation or on its behalf or under its auspices;
  - (c) the provision of goods, facilities or services in the course of activities undertaken by the organisation or on its behalf or under its auspices;
  - (d) the use or disposal of premises owned or controlled by the organisation.



- 
- (4) A person does not contravene Part 3, 4 or 7, so far as relating to religion or belief or sexual orientation, only by doing anything mentioned in sub-paragraph (3) on behalf of or under the auspices of the organisation.
  - (5) A minister does not contravene Part 3, 4 or 7, so far as relating to religion or belief or sexual orientation, only by restricting –
    - (a) participation in activities carried on in the performance of the minister's functions in connection with or in respect of the organisation;
    - (b) the provision of goods, facilities or services in the course of activities carried on in the performance of the minister's functions in connection with or in respect of the organisation.
  - (6) Sub-paragraphs (3) to (5) permit a restriction relating to religion or belief only if it is imposed –
    - (a) because of the purpose of the organisation, or
    - (b) to avoid causing offence, on grounds of the religion or belief to which the organisation relates, to persons of that religion or belief.
  - (7) Sub-paragraphs (3) to (5) permit a restriction relating to sexual orientation only if it is imposed –
    - (a) because it is necessary to comply with the doctrine of the organisation, or
    - (b) to avoid conflict with strongly held convictions within sub-paragraph (9).
  - (8) In sub-paragraph (5), the reference to a minister is a reference to a minister of religion, or other person, who –
    - (a) performs functions in connection with a religion or belief to which the organisation relates, and
    - (b) holds an office or appointment in, or is accredited, approved or recognised for the purposes of the organisation.
  - (9) The strongly held convictions are –
    - (a) in the case of a religion, the strongly held religious convictions of a significant number of the religion's followers;
    - (b) in the case of a belief, the strongly held convictions relating to the belief of a significant number of the belief's followers.
  - (10) This paragraph does not permit anything which is prohibited by section 29, so far as relating to sexual orientation, if it is done –
    - (a) on behalf of a public authority, and
    - (b) under the terms of a contract between the organisation and the public authority.
  - (11) In the application of this paragraph in relation to sexual orientation, sub-paragraph (1)(e) must be ignored.
  - (12) In the application of this paragraph in relation to sexual orientation, in sub-paragraph (3)(d), "disposal" does not include disposal of an interest in premises by way of sale if the interest being disposed of is –
    - (a) the entirety of the organisation's interest in the premises, or
    - (b) the entirety of the interest in respect of which the organisation has power of disposal.
  - (13) In this paragraph –

- (a) “disposal” is to be construed in accordance with section 38;
- (b) “public authority” has the meaning given in section 150(1).

*Communal accommodation*

- 3 (1) A person does not contravene this Act, so far as relating to sex discrimination or gender reassignment discrimination, only because of anything done in relation to—
- (a) the admission of persons to communal accommodation;
  - (b) the provision of a benefit, facility or service linked to the accommodation.
- (2) Sub-paragraph (1)(a) does not apply unless the accommodation is managed in a way which is as fair as possible to both men and women.
- (3) In applying sub-paragraph (1)(a), account must be taken of—
- (a) whether and how far it is reasonable to expect that the accommodation should be altered or extended or that further accommodation should be provided, and
  - (b) the frequency of the demand or need for use of the accommodation by persons of one sex as compared with those of the other.
- (4) In applying sub-paragraph (1)(a) in relation to gender reassignment, account must also be taken of whether and how far the conduct in question is a proportionate means of achieving a legitimate aim.
- (5) Communal accommodation is residential accommodation which includes dormitories or other shared sleeping accommodation which for reasons of privacy should be used only by persons of the same sex.
- (6) Communal accommodation may include—
- (a) shared sleeping accommodation for men and for women;
  - (b) ordinary sleeping accommodation;
  - (c) residential accommodation all or part of which should be used only by persons of the same sex because of the nature of the sanitary facilities serving the accommodation.
- (7) A benefit, facility or service is linked to communal accommodation if—
- (a) it cannot properly and effectively be provided except for those using the accommodation, and
  - (b) a person could be refused use of the accommodation in reliance on sub-paragraph (1)(a).
- (8) This paragraph does not apply for the purposes of Part 5 (work) unless such arrangements as are reasonably practicable are made to compensate for—
- (a) in a case where sub-paragraph (1)(a) applies, the refusal of use of the accommodation;
  - (b) in a case where sub-paragraph (1)(b) applies, the refusal of provision of the benefit, facility or service.

*Training provided to non-EEA residents, etc.*

- 4 (1) A person (A) does not contravene this Act, so far as relating to nationality, only by providing a non-resident (B) with training, if A thinks that B does not intend to exercise in Great Britain skills B obtains as a result.

- (2) A non-resident is a person who is not ordinarily resident in an EEA state.
- (3) The reference to providing B with training is –
  - (a) if A employs B in relevant employment, a reference to doing anything in or in connection with the employment;
  - (b) if A as a principal allows B to do relevant contract work, a reference to doing anything in or in connection with allowing B to do the work;
  - (c) in a case within paragraph (a) or (b) or any other case, a reference to affording B access to facilities for education or training or ancillary benefits.
- (4) Employment or contract work is relevant if its sole or main purpose is the provision of training in skills.
- (5) In the case of training provided by the armed forces or Secretary of State for purposes relating to defence, sub-paragraph (1) has effect as if –
  - (a) the reference in sub-paragraph (2) to an EEA state were a reference to Great Britain, and
  - (b) in sub-paragraph (4), for “its sole or main purpose is” there were substituted “it is for purposes including”.
- (6) “Contract work” and “principal” each have the meaning given in section 41.

## SCHEDULE 24

Section 203

## HARMONISATION: EXCEPTIONS

Part 1 (public sector duty regarding socio-economic inequalities)

Chapter 2 of Part 5 (occupational pensions)

Section 78 (gender pay gap)

Section 106 (election candidates: diversity information)

Chapters 1 to 3 and 5 of Part 9 (enforcement), except section 136

Sections 142 and 146 (unenforceable terms, declaration in respect of void terms)

Chapter 1 of Part 11 (public sector equality duty)

Part 12 (disabled persons: transport)

Part 13 (disability: miscellaneous)

Section 197 (power to specify age exceptions)

Part 15 (family property)

Part 16 (general and miscellaneous)

Schedule 1 (disability: supplementary provision)

In Schedule 3 (services and public functions: exceptions) –

- (a) in Part 3 (health and care), paragraphs 13 and 14;
- (b) Part 4 (immigration);
- (c) Part 5 (insurance);
- (d) Part 6 (marriage);
- (e) Part 7 (separate and single services), except paragraph 30;
- (f) Part 8 (television, radio and on-line broadcasting and distribution);
- (g) Part 9 (transport);
- (h) Part 10 (supplementary)

Schedule 4 (premises: reasonable adjustments)

Schedule 5 (premises: exceptions), except paragraph 1

Schedule 6 (office-holders: excluded offices), except so far as relating to colour or nationality or marriage and civil partnership

Schedule 8 (work: reasonable adjustments)

In Schedule 9 (work: exceptions) –

- (a) Part 1 (general), except so far as relating to colour or nationality;
- (b) Part 2 (exceptions relating to age);
- (c) Part 3 (other exceptions), except paragraph 19 so far as relating to colour or nationality

Schedule 10 (education: accessibility for disabled pupils)

Schedule 13 (education: reasonable adjustments), except paragraphs 2, 5, 6 and 9

Schedule 17 (education: disabled pupils: enforcement)

Schedule 18 (public sector equality duty: exceptions)

Schedule 19 (list of public authorities)

Schedule 20 (rail vehicle accessibility: compliance)

Schedule 21 (reasonable adjustments: supplementary)

In Schedule 22 (exceptions: statutory provisions), paragraphs 2 and 5

Schedule 23 (general exceptions), except paragraph 2

Schedule 25 (information society services)

## SCHEDULE 25

Section 206

## INFORMATION SOCIETY SERVICES

*Service providers*

- 1 (1) This paragraph applies where a person concerned with the provision of an information society service (an “information society service provider”) is established in Great Britain.
- (2) This Act applies to anything done by the person in an EEA state (other than the United Kingdom) in providing the service as this Act would apply if the act in question were done by the person in Great Britain.
- 2 (1) This paragraph applies where an information society service provider is established in an EEA state (other than the United Kingdom).
- (2) This Act does not apply to anything done by the person in providing the service.

*Exceptions for mere conduits*

- 3 (1) An information society service provider does not contravene this Act only by providing so much of an information society service as consists in—
  - (a) the provision of access to a communication network, or
  - (b) the transmission in a communication network of information provided by the recipient of the service.
- (2) But sub-paragraph (1) applies only if the service provider does not—
  - (a) initiate the transmission,
  - (b) select the recipient of the transmission, or
  - (c) select or modify the information contained in the transmission.
- (3) For the purposes of sub-paragraph (1), the provision of access to a communication network, and the transmission of information in a communication network, includes the automatic, intermediate and transient storage of the information transmitted so far as the storage is solely for the purpose of carrying out the transmission in the network.
- (4) Sub-paragraph (3) does not apply if the information is stored for longer than is reasonably necessary for the transmission.

*Exception for caching*

- 4 (1) This paragraph applies where an information society service consists in the transmission in a communication network of information provided by a recipient of the service.
- (2) The information society service provider does not contravene this Act only by doing anything in connection with the automatic, intermediate and temporary storage of information so provided if—
  - (a) the storage of the information is solely for the purpose of making more efficient the onward transmission of the information to other recipients of the service at their request, and
  - (b) the condition in sub-paragraph (3) is satisfied.
- (3) The condition is that the service-provider—

- (a) does not modify the information,
  - (b) complies with such conditions as are attached to having access to the information, and
  - (c) (where sub-paragraph (4) applies) expeditiously removes the information or disables access to it.
- (4) This sub-paragraph applies if the service-provider obtains actual knowledge that—
- (a) the information at the initial source of the transmission has been removed from the network,
  - (b) access to it has been disabled, or
  - (c) a court or administrative authority has required the removal from the network of, or the disablement of access to, the information.

*Exception for hosting*

- 5 (1) An information society service provider does not contravene this Act only by doing anything in providing so much of an information society service as consists in the storage of information provided by a recipient of the service, if—
- (a) the service provider had no actual knowledge when the information was provided that its provision amounted to a contravention of this Act, or
  - (b) on obtaining actual knowledge that the provision of the information amounted to a contravention of that section, the service provider expeditiously removed the information or disabled access to it.
- (2) Sub-paragraph (1) does not apply if the recipient of the service is acting under the authority of the control of the service provider.

*Monitoring obligations*

- 6 An injunction or interdict under Part 1 of the Equality Act 2006 may not impose on a person concerned with the provision of a service of a description given in paragraph 3(1), 4(1) or 5(1)—
- (a) a liability the imposition of which would contravene Article 12, 13 or 14 of the E-Commerce Directive;
  - (b) a general obligation of the description given in Article 15 of that Directive.

*Interpretation*

- 7 (1) This paragraph applies for the purposes of this Schedule.
- (2) “Information society service”—
- (a) has the meaning given in Article 2(a) of the E-Commerce Directive (which refers to Article 1(2) of Directive 98/34/EC of the European Parliament and of the Council of 22 June 1998 laying down a procedure for the provision of information in the field of technical standards and regulations), and
  - (b) is summarised in recital 17 of the E-Commerce Directive as covering “any service normally provided for remuneration, at a distance, by means of electronic equipment for the processing (including digital



- compression) and storage of data, and at the individual request of a recipient of a service”.
- (3) “The E-Commerce Directive” means Directive 2000/31/EC of the European Parliament and of the Council of 8 June 2000 on certain legal aspects of information society services, in particular electronic commerce, in the Internal Market (Directive on electronic commerce).
  - (4) “Recipient” means a person who (whether for professional purposes or not) uses an information society service, in particular for seeking information or making it accessible.
  - (5) An information society service-provider is “established” in a country or territory if the service-provider –
    - (a) effectively pursues an economic activity using a fixed establishment in that country or territory for an indefinite period, and
    - (b) is a national of an EEA state or a body mentioned in Article 48 of the EEC treaty.
  - (6) The presence or use in a particular place of equipment or other technical means of providing an information society service is not itself sufficient to constitute the establishment of a service-provider.
  - (7) Where it cannot be decided from which of a number of establishments an information society service is provided, the service is to be regarded as provided from the establishment at the centre of the information society service provider’s activities relating to that service.
  - (8) Section 212(4) does not apply to references to providing a service.

## SCHEDULE 26

Section 211

## AMENDMENTS

*Local Government Act 1988*

- 1 Part 2 of the Local Government Act 1988 (public supply or works contracts) is amended as follows.
- 2 In section 17 (local and other public authority contracts: exclusion of non-commercial considerations) –
  - (a) omit subsection (9), and
  - (b) after that subsection insert –
    - “(10) This section does not prevent a public authority to which it applies from exercising any function regulated by this section with reference to a non-commercial matter to the extent that the authority considers it necessary or expedient to do so to enable or facilitate compliance with –
      - (a) the duty imposed on it by section 149 of the Equality Act 2010 (public sector equality duty), or
      - (b) any duty imposed on it by regulations under section 153 or 154 of that Act (powers to impose specific duties).”



- 3 Omit section 18 (exceptions to section 17 relating to race relations matters).
- 4 In section 19 (provisions supplementary to or consequential on section 17) omit subsection (10).

*Employment Act 1989*

- 5 (1) Section 12 of the Employment Act 1989 (Sikhs: requirements as to safety helmets) is amended as follows.
- (2) In subsection (1), for “requirement or condition”, in the first three places, substitute “provision, criterion or practice”.
- (3) In that subsection, for the words from “section 1(1)(b)” to the end substitute “section 19 of the Equality Act 2010 (indirect discrimination), the provision, criterion or practice is to be taken as one in relation to which the condition in subsection (2)(d) of that section (proportionate means of achieving a legitimate aim) is satisfied”.
- (4) In subsection (2), for the words from “the Race Relations Act” to the end substitute “section 13 of the Equality Act 2010 as giving rise to discrimination against any other person”.

*Equality Act 2006*

- 6 The Equality Act 2006 is amended as follows.
- 7 (1) Section 8 (equality and diversity) is amended as follows.
- (2) In subsection (1) –
- (a) in paragraph (d) for “equality enactments” substitute “Equality Act 2010”, and
- (b) in paragraph (e) for “the equality enactments” substitute “that Act”.
- (3) In subsection (4) for “Disability Discrimination Act 1995 (c. 50)” substitute “Equality Act 2010”.
- 8 In section 10(2) (meaning of group) for paragraph (d) substitute –
- “(d) gender reassignment (within the meaning of section 7 of the Equality Act 2010).”
- 9 For section 11(3)(c) (interpretation) substitute –
- “(c) a reference to the equality and human rights enactments is a reference to the Human Rights Act 1998, this Act and the Equality Act 2010.”
- 10 (1) Section 14 (codes of practice) is amended as follows.
- (2) For subsection (1) substitute –
- “(1) The Commission may issue a code of practice in connection with any matter addressed by the Equality Act 2010.”
- (3) In subsection (2)(a) for “a provision or enactment listed in subsection (1)” substitute “the Equality Act 2010 or an enactment made under that Act”.
- (4) In subsection (3) –

- (a) in paragraph (a) for “section 49G(7) of the Disability Discrimination Act 1995 (c. 50)” substitute “section 190(7) of the Equality Act 2010”, and
  - (b) for paragraph (c)(iv) substitute –  
“(iv) section 190 of the Equality Act 2010.”
- (5) In subsection (5)(a) for “listed in subsection (1)” substitute “a matter addressed by the Equality Act 2010”.
- (6) In subsection (9) for “section 76A” to “duties)” substitute “section 149, 153 or 154 of the Equality Act 2010 (public sector equality duty)”.
- 11 In section 16(4) (inquiries: matters which the Commission may consider and report on) for “equality enactments” substitute “Equality Act 2010”.
- 12 In section 21(2)(b) (unlawful act notice: specification of legislative provision) for “equality enactments” substitute “Equality Act 2010”.
- 13 After section 24 insert –

**“24A Enforcement powers: supplemental**

- (1) This section has effect in relation to –
    - (a) an act which is unlawful because, by virtue of any of sections 13 to 18 of the Equality Act 2010, it amounts to a contravention of any of Parts 3, 4, 5, 6 or 7 of that Act,
    - (b) an act which is unlawful because it amounts to a contravention of section 60(1) of that Act (or to a contravention of section 111 or 112 of that Act that relates to a contravention of section 60(1) of that Act) (enquiries about disability and health),
    - (c) an act which is unlawful because it amounts to a contravention of section 106 of that Act (information about diversity in range of election candidates etc.),
    - (d) an act which is unlawful because, by virtue of section 108(1) of that Act, it amounts to a contravention of any of Parts 3, 4, 5, 6 or 7 of that Act, or
    - (e) the application of a provision, criterion or practice which, by virtue of section 19 of that Act, amounts to a contravention of that Act.
  - (2) For the purposes of sections 20 to 24 of this Act, it is immaterial whether the Commission knows or suspects that a person has been or may be affected by the unlawful act or application.
  - (3) For those purposes, an unlawful act includes making arrangements to act in a particular way which would, if applied to an individual, amount to a contravention mentioned in subsection (1)(a).
  - (4) Nothing in this Act affects the entitlement of a person to bring proceedings under the Equality Act 2010 in respect of a contravention mentioned in subsection (1).”
- 14 Omit section 25 (restraint of unlawful advertising etc.).
- 15 Omit section 26 (supplemental).
- 16 (1) Section 27 (conciliation) is amended as follows.

- (2) For subsection (1) (disputes in relation to which the Commission may make arrangements for the provision of conciliation services) substitute –
- “(1) The Commission may make arrangements for the provision of conciliation services for disputes in respect of which proceedings have been or could be determined by virtue of section 114 of the Equality Act 2010.”
- 17 (1) Section 28 (legal assistance) is amended as follows.
- (2) In subsection (1) –
- (a) in paragraph (a) for “equality enactments” substitute “Equality Act 2010”, and
- (b) in paragraph (b) for “the equality enactments” substitute “that Act”.
- (3) In subsection (5) for “Part V of the Disability Discrimination Act 1995 (c. 50) (public)” substitute “Part 12 of the Equality Act 2010 (disabled persons)”.
- (4) In subsection (6) –
- (a) for “the equality enactments”, on the first occasion it appears, substitute “the Equality Act 2010”, and
- (b) for “the equality enactments”, on each other occasion it appears, substitute “that Act”.
- (5) In subsection (7) –
- (a) in paragraph (a) for “equality enactments” substitute “Equality Act 2010”, and
- (b) in paragraph (b) for “the equality enactments” substitute “that Act”.
- (6) In subsection (8) for “Part V of the Disability Discrimination Act 1995 (c. 50)” substitute “Part 12 of the Equality Act 2010”.
- (7) In subsection (9) for “equality enactments” substitute “Equality Act 2010”.
- (8) In subsection (12) –
- (a) for “A reference in” to “includes a reference” substitute “This section applies”, and
- (b) after paragraph (b) add “as it applies to the Equality Act 2010.”
- 18 For section 31(1) (duties in respect of which Commission may assess compliance) substitute –
- “(1) The Commission may assess the extent to which or the manner in which a person has complied with a duty under or by virtue of section 149, 153 or 154 of the Equality Act 2010 (public sector equality duty).”
- 19 (1) Section 32 (public sector duties: compliance notice) is amended as follows.
- (2) For subsection (1) substitute –
- “(1) This section applies where the Commission thinks that a person has failed to comply with a duty under or by virtue of section 149, 153 or 154 of the Equality Act 2010 (public sector equality duty).”
- (3) In subsection (4) for “section 76A” to “Disability Discrimination Act 1995” substitute “section 149 of the Equality Act 2010”.

- 
- (4) In subsection (9)(a) for “section 76A” to “Disability Discrimination Act 1995 (c. 50)” substitute “section 149 of the Equality Act 2010”.
- (5) In subsection (9)(b) for “in any other case” substitute “where the notice related to a duty by virtue of section 153 or 154 of that Act”.
- (6) In subsection (11) for “section 76B” to “Disability Discrimination Act 1995” substitute “section 153 or 154 of the Equality Act 2010”.
- 20 Omit section 33 (equality and human rights enactments).
- 21 (1) Section 34 (meaning of unlawful) is amended as follows.
- (2) In subsection (1) for “equality enactments” substitute “Equality Act 2010”.
- (3) In subsection (2) –
- (a) after “virtue of” insert “any of the following provisions of the Equality Act 2010”, and
- (b) for paragraphs (a) to (c) substitute –
- “(a) section 1 (public sector duty regarding socio-economic inequalities),
- (b) section 149, 153 or 154 (public sector equality duty),
- (c) Part 12 (disabled persons: transport), or
- (d) section 190 (disability: improvements to let dwelling houses).”
- 22 (1) Section 35 (general: definitions) is amended as follows.
- (2) In the definition of “religion or belief”, for “Part 2 (as defined by section 44)” substitute “section 10 of the Equality Act 2010”.
- (3) For the definition of “sexual orientation” substitute –
- ““sexual orientation” has the same meaning as in section 12 of the Equality Act 2010.”
- 23 In section 39(4) (orders subject to affirmative resolution procedure) for “, 27(10) or 33(3)” substitute “or 27(10)”.
- 24 Omit section 43 (transitional: rented housing in Scotland).
- 25 Omit Part 2 (discrimination on grounds of religion or belief).
- 26 Omit section 81 (regulations).
- 27 Omit Part 4 (public functions).
- 28 In section 94(3) (extent: Northern Ireland) –
- (a) omit “and 41 to 56”, and
- (b) omit “and the Disability Discrimination Act 1995 (c. 50)”.
- 29 (1) Schedule 1 (the Commission: constitution, etc.) is amended as follows.
- (2) In paragraph 52(3)(a) for “Parts 1, 3, 4, 5 and 5B of the Disability Discrimination Act 1995 (c. 50)” substitute “Parts 2, 3, 4, 6, 7, 12 and 13 of the Equality Act 2010, in so far as they relate to disability”.
- (3) In paragraph 53 for “Part 2 of the Disability Discrimination Act 1995 (c. 50)” substitute “Part 5 of the Equality Act 2010”.

- (4) In paragraph 54 for “Part 2 of the Disability Discrimination Act 1995” substitute “Part 5 of the Equality Act 2010”.
- 30 In Schedule 3 (consequential amendments), omit paragraphs 6 to 35 and 41 to 56.

## SCHEDULE 27

Section 211

## REPEALS AND REVOCATIONS

## PART 1

## REPEALS

<i>Short title</i>	<i>Extent of repeal</i>
Equal Pay Act 1970	The whole Act.
Sex Discrimination Act 1975	The whole Act.
Race Relations Act 1976	The whole Act.
Sex Discrimination Act 1986	The whole Act.
Local Government Act 1988	Section 17(9). Section 18. Section 19(10).
Employment Act 1989	Sections 1 to 7. Section 9.
Social Security Act 1989	In Schedule 5, paragraph 5.
Disability Discrimination Act 1995	The whole Act.
Pensions Act 1995	Sections 62 to 65.
Greater London Authority Act 1999	Section 404.
Sex Discrimination (Election Candidates) Act 2002	Section 1.
Civil Partnership Act 2004	Section 6(1)(b) and (2).
Education (Additional Support for Learning) (Scotland) Act 2004	In section 17(1) “to exercise the functions which are conferred on a Tribunal by virtue of this Act”.
Equality Act 2006	Section 25. Section 26. Section 33. Section 43. Part 2. Section 81. Part 4. In section 94(3) “and 41 to 56” and “and the Disability Discrimination Act 1995 (c. 50)”. In Schedule 3— (a) paragraphs 6 to 35; (b) paragraphs 41 to 56.

## PART 2

## REVOCATIONS

<i>Title</i>	<i>Extent of revocation</i>
Occupational Pension Schemes (Equal Treatment) Regulations 1995 (S.I. 1995/3183)	The whole Regulations.
Employment Equality (Religion or Belief) Regulations 2003 (S.I. 2003/1660)	The whole Regulations.
Employment Equality (Sexual Orientation) Regulations 2003 (S.I. 2003/1661)	The whole Regulations.
Disability Discrimination Act 1995 (Pensions) Regulations 2003 (S.I. 2003/2770)	The whole Regulations.
Occupational Pension Schemes (Equal Treatment) (Amendment) Regulations 2005 (S.I. 2005/1923)	The whole Regulations.
Employment Equality (Age) Regulations 2006 (S.I. 2006/1031)	The whole Regulations (other than Schedules 6 and 8).
Equality Act (Sexual Orientation) Regulations 2007 (S.I. 2007/1263)	The whole Regulations.
Sex Discrimination (Amendment of Legislation) Regulations 2008 (S.I. 2008/963)	The whole Regulations.

## SCHEDULE 28

Section 214

## INDEX OF DEFINED EXPRESSIONS

<i>Expression</i>	<i>Provision</i>
Accrual of rights, in relation to an occupational pension scheme	Section 212(12)
Additional maternity leave	Section 213(6) and (7)
Additional maternity leave period	Section 213(8)
Age discrimination	Section 25(1)

<i>Expression</i>	<i>Provision</i>
Age group	Section 5(2)
Armed forces	Section 212(1)
Association	Section 107(2)
Auxiliary aid	Section 20(11)
Belief	Section 10(2)
Breach of an equality clause or rule	Section 212(8)
The Commission	Section 212(1)
Commonhold	Section 38(7)
Compulsory maternity leave	Section 213(3)
Contract work	Section 41(6)
Contract worker	Section 41(7)
Contravention of this Act	Section 212(9)
Crown employment	Section 83(9)
Detriment	Section 212(1) and (5)
Disability	Section 6(1)
Disability discrimination	Section 25(2)
Disabled person	Section 6(2) and (4)
Discrimination	Sections 13 to 19, 21 and 108
Disposal, in relation to premises	Section 38(3) to (5)
Education Acts	Section 212(1)
Employer, in relation to an occupational pension scheme	Section 212(11)
Employment	Section 212(1)
Enactment	Section 212(1)
Equality clause	Section 212(1)
Equality rule	Section 212(1)
Firm	Section 46(2)
Gender reassignment	Section 7(1)
Gender reassignment discrimination	Section 25(3)
Harassment	Section 26(1)

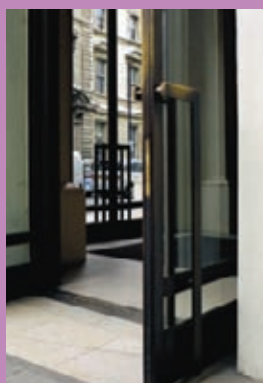


<i>Expression</i>	<i>Provision</i>
Independent educational institution	Section 89(7)
LLP	Section 46(4)
Man	Section 212(1)
Marriage and civil partnership	Section 8
Marriage and civil partnership discrimination	Section 25(4)
Maternity equality clause	Section 212(1)
Maternity equality rule	Section 212(1)
Maternity leave	Section 213(2)
Member, in relation to an occupational pension scheme	Section 212(10)
Member of the executive	Section 212(7)
Non-discrimination rule	Section 212(1)
Occupation, in relation to premises	Section 212(6)
Occupational pension scheme	Section 212(1)
Offshore work	Section 82(3)
Ordinary maternity leave	Section 213(4) and (5)
Parent	Section 212(1)
Pension credit member	Section 212(11)
Pensionable service	Section 212(11)
Pensioner member	Section 212(11)
Personal office	Section 49(2)
Physical feature	Section 20(10)
Pregnancy and maternity discrimination	Section 25(5)
Premises	Section 38(2)
Prescribed	Section 212(1)
Profession	Section 212(1)
Proposed firm	Section 46(3)
Proposed LLP	Section 46(5)
Proprietor, in relation to a school	Section 89(4)

<i>Expression</i>	<i>Provision</i>
Protected characteristics	Section 4
Protected period, in relation to pregnancy	Section 18(6)
Provision of a service	Sections 31 and 212(4)
Public function	Sections 31(4) and 150(5)
Public office	Sections 50(2) and 52(4)
Pupil	Section 89(3)
Race	Section 9(1)
Race discrimination	Section 25(6)
Reasonable adjustments, duty to make	Section 20
Relevant member of the House of Commons staff	Section 83(5)
Relevant member of the House of Lords staff	Section 83(6)
Relevant person, in relation to a personal or public office	Section 52(6)
Religion	Section 10(1)
Religious or belief-related discrimination	Section 25(7)
Requirement, the first, second or third	Section 20
Responsible body, in relation to a further or higher education institution	Section 91(12)
Responsible body, in relation to a school	Section 85(9)
School	Section 89(5) and (6)
Service-provider	Section 29(1)
Sex	Section 11
Sex discrimination	Section 25(8)
Sex equality clause	Section 212(1)
Sex equality rule	Section 212(1)
Sexual orientation	Section 12(1)
Sexual orientation discrimination	Section 25(9)

<i>Expression</i>	<i>Provision</i>
Student	Section 94(3)
Subordinate legislation	Section 212(1)
Substantial	Section 212(1)
Taxi, for the purposes of Part 3 (services and public functions)	Schedule 2, paragraph 4
Taxi, for the purposes of Chapter 1 of Part 12 (disabled persons: transport)	Section 173(1)
Tenancy	Section 38(6)
Trade	Section 212(1)
Transsexual person	Section 7(2)
Trustees or managers, in relation to an occupational pension scheme	Section 212(11)
University	Section 94(4)
Victimisation	Section 27(1)
Vocational training	Section 56(6)
Woman	Section 212(1)

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# Easy Access to Historic Buildings



# English Heritage's commitment to access

Too many people think of the historic environment as being inaccessible. English Heritage knows that this need not be the case. On the contrary, we have seen and been involved with some amazing solutions to all types of barriers, physical and otherwise. What we have learnt is that with the right kind of thought and discussion a way can be found round almost any barrier. We also recognise that people's expectations – and the technical opportunities to meet them – are constantly evolving. For that reason we are using our growing awareness to the issues disabled people face to constantly improve the accessibility of all our own services.

While the needs of disabled people must be our highest priority, we also know that easier access will benefit almost all of us at some stage in our lives. Whether during pregnancy, as a parent pushing a buggy or an older person who is finding steps a bit harder to manage, we all value thoughtful and effective design for our access needs.

We want to see the broadest possible public access to the historic environment and to the interpretation that makes it come alive. This is because we believe that the historic environment can make a positive difference to the lives not only of individuals but whole communities. For that reason we will continue to promote solutions that make access easier while simultaneously encouraging responsible care of the historic places that matter to us all.

In its search for a more inclusive approach to the historic environment English Heritage is keen to celebrate access solutions that combine conservation with excellent, high quality modern design. Our publications on *Easy Access to Historic Landscapes* and *Easy Access to Historic Buildings* show how this vision can be turned into practical reality.

Baroness Andrews  
Chair, English Heritage

# Contents

<b>Part 1:</b>		<b>Part 3:</b>	
<b>Why access matters</b>	<b>5</b>	<b>Making access a reality</b>	<b>29</b>
Conservation principles	7	Practical advice and examples	29
<b>The statutory framework</b>	<b>8</b>	<b>Horizontal movement</b>	<b>30</b>
The Equality Act 2010	8	Making an entrance	30
Planning permission	9	Inside the building	31
The Building Regulations 2010: Approved Document M (2004)	10	Floors	31
Listed building consent	11	Doors and openings	32
Ecclesiastical buildings	13	Thresholds	33
Scheduled monument consent	13	Corridors	33
Historic gardens and landscapes	14	Visual contrast	33
		<b>Vertical movement</b>	<b>35</b>
		Ramps	35
<b>Part 2:</b>		Stairs and landings	37
<b>Planning better access</b>	<b>15</b>	Handrails	37
<b>What is reasonable?</b>	<b>15</b>	Lifts	40
The access strategy	15	Emergency escape	44
The access audit	17	<b>Lighting, signs and information</b>	<b>45</b>
The conservation assessment	17	Lighting	45
The access plan	17	Signs	45
Management issues	19	Information	46
Funding for access improvements	20	<b>Landscape and settings</b>	<b>47</b>
<b>Barriers to access</b>	<b>21</b>	<b>Street furniture and seating</b>	<b>49</b>
Overcoming barriers	21		
Removing the feature	25	<b>Published sources of information</b>	<b>50</b>
Altering the feature	25	<b>Where to go for further help</b>	<b>52</b>
Finding ways round barriers to access	26		
Providing the service in another way	26		





Access was improved at the scheduled Ypres Tower in Rye, East Sussex, by creating a gently sloping approach path across the lawn and reconstructing an original medieval doorway to give level access to the ground floor.



The policy of the Equality Act is not a minimalist policy of simply ensuring that some access is available to disabled people; it is, so far as is reasonably practicable, to approximate the access enjoyed by disabled people to that enjoyed by the rest of the public. The purpose of the duty to make reasonable adjustments is to provide access to a service as close as it is reasonably possible to get to the standard normally offered to the public at large (and their equivalents in relation to associations or the exercise of public functions).

*Equality Act 2010 Statutory Code of Practice: Services, Public Functions and Associations, 2011, page 90, 7.4*

# Part I: Why access matters

English Heritage recognises that everyone should be able to enjoy easy and inclusive access to the historic environment. Removing the barriers to access can allow many more people to use and benefit from the historic environment, and if done sensitively need not compromise the ability of future generations to do the same.

Providing easy access to properties that have changes of level, uneven routes and other obstacles can seem daunting. It is nevertheless remarkable how much can be achieved with careful thought and good advice. While physical barriers often pose the greatest challenges, improvements to interpretation and services can also increase people's ability to engage with our cultural heritage, compensating at least in part for any unavoidable limitations to physical access.

Making it easier to use buildings and their surrounding landscapes can also be a legislative requirement. The Equality Act gives people protection from discrimination in a range of areas including the accessing of services, education and employment. Organisations and individuals who have duties under the Act have to make sure that they do not discriminate, which means that they may need to adapt their premises to allow disabled people to access services and employment.

These guidelines are intended for those who own, manage or occupy historic buildings in England. They are also for the benefit of those who will be professionally involved in planning alterations or in advising on alternative forms of service provision. Their first aim is to explain how the process of improving access can be satisfactorily aligned with the wider principles of conservation. As well as providing a summary of the statutory framework they illustrate different successful approaches, ranging from minor improvement works to high-quality modern design solutions.

The guidelines do not deal with those aspects of access that relate to broader policies, practices and procedures, or with general design issues. These are covered in detail in other publications – good, comprehensive design guidance is available in BS 8300 and also covered in *Approved Document M* of the Building Regulations. The guidelines do, however, contain significant detail on the nature of historic buildings, their features and the challenges they pose.



The construction of a new visitor centre at Whitby Abbey, with a passenger lift within the ruined shell of the 17th-century mansion, provided the opportunity to improve access to the abbey ruins. Consent was obtained to open up a blocked doorway at upper-floor level and to form a ramped bridge from the opening onto the elevated abbey precincts.

Picture to the right:

© Martine Hamilton Knight / BuiltVision

Picture below:

© Tony Bartholomew



## Conservation principles

Buildings, landscapes and monuments – the physical survivals of our past – are protected not their own sake but for our benefit and that of the generations who will succeed us. They are an integral part of our cultural identity and contribute towards a strong sense of place, whether in a local, regional or national context. They are irreplaceable, but sometimes they need to be modified to meet the changing needs of their occupants. The survival of most historic buildings depends upon their continued, viable use and this may, among other things, require alterations to improve access.

Sensitive alteration will have due regard for what it is that makes a particular building special or significant. Significance may arise from its distinctive physical features, from its layout and relative completeness, from the materials and methods of its construction, or from its association with particular personalities and events. Significance may also lie in the archaeological remains that survive hidden in the ground below. Understanding the significance of a building is a vital first step in thinking about how much it can be changed.

In most cases access can be improved without compromising the special interest of historic buildings. There are only rare occasions when nothing can be done to improve or facilitate access. By undertaking a careful process of research, brief-taking, consultation and creative exploration of alternatives, good quality solutions that add a new layer of history to our historic buildings are usually possible.

The English Heritage document *Conservation Principles: Policies and Guidance for the Sustainable Management of the Historic Environment* sets out a consistent approach to making decisions about all aspects of the historic environment. It also shows how its protection can be reconciled with the economic and social needs and aspirations of the people who live in it. The principles align with the National Planning Policy Framework, which sets out the Government's planning policies for England, provides a framework for sustainable development and gives strategies for conserving and enhancing the historic environment. The provision of easy access can be an important part of a sustainable approach to caring for the historic environment and *Conservation Principles* shows how access can be improved without compromising the significance of special places.



Consent for the new passenger lift at Colchester Castle was dependent upon the outcome of an archaeological investigation. The cost and time to conduct an investigation needs to be anticipated in the building budget and programme.

# The statutory framework

## The Equality Act 2010

The Equality Act provides a legal framework to protect the rights of individuals and advance equality of opportunity for all. The Act covers discrimination because of age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation. These categories are known in the Act as 'protected characteristics'. The Act sets out the different ways in which it is unlawful to treat someone, such as direct and indirect discrimination, harassment, victimisation and failing to make a reasonable adjustment for a disabled person.

People and organisations who own, manage or occupy historic buildings in England, and who have duties under the service-provider, employer, education and other provisions of the act, need to ensure that they do not discriminate against people with protected characteristics. When considering physical access to buildings and their surroundings it is necessary to take account of duties relating to disabled people and to consider potential barriers to access. However, it is important to remember that the Equality Act is about people and not buildings. The Act does not include standards for accessible building design, though following good-practice guidance, such as the standards set out in BS 8300 and *Approved Document M* of the Building Regulations, can help duty holders provide a reasonable standard of access and thus fulfill their duties under the Act.

## Employers

All employers, large and small, have a duty to make reasonable adjustments to avoid substantial disadvantage to disabled employees. The duty to make these changes is not speculative, but relates to the actual needs of a specific individual who is disabled. It may, however, be more cost-effective to consider access improvements as part of a programme of planned refurbishment, thereby allowing for disabled people to be employed in the future without the need for further alterations.

## Service providers

The duty to make reasonable adjustments requires service providers to take positive steps to ensure that disabled people can access services at a standard that is as close as possible to that offered to the public at large. This duty may require service providers to make reasonable adjustments to any physical features, including furniture and displays, wherever disabled customers or potential customers would otherwise be at a substantial disadvantage compared with non-disabled people.

Unlike the duty imposed on employers, this is an anticipatory duty; service providers are required to anticipate the needs of disabled people and to accommodate them in a wide variety of ways. The duty to make reasonable adjustments is also a continuous one and service providers will need to review the changes they have made at periodic intervals.

**Volunteers**

Volunteers may also be protected under the Equality Act. If volunteers have a contract and receive more than just out-of-pocket expenses then they may be treated as employees. Other volunteers may also be protected as guidance states that providing someone with a volunteering opportunity counts as providing them with a service and so service-provider duties come into play.

**Educational institutions**

Post-16 educational institutions have a duty to make reasonable adjustments for disabled students, including modifications to physical features. This duty is similar to that imposed on service providers and is again anticipatory.

Where educational buildings are used for conferences, banquets, and other non-educational purposes, this is likely to give rise to service-provider duties.

**The Public Sector Equality Duty**

The Public Sector Equality Duty, which is made up of a general equality duty supported by specific duties, is part of the Equality Act and applies to certain public sector bodies, including key organisations such as local authorities and the providers of health, transport and education services. Those bodies must have due regard to the need to eliminate unlawful discrimination, harassment and victimisation, advance equality of opportunity and foster good relations between different groups. This duty encourages consideration of physical

access for disabled people and the making of appropriate adjustments.

The Equality Act does not override other legislation such as listed building or planning legislation, and the need to obtain appropriate approvals still applies in the case of changes made to improve access.

**Planning permission**

Planning control is the system used to manage the development of land and buildings; it is administered by local planning authorities. Planning permission is required for most kinds of work that involve material alteration to the external appearance of a building. It also covers most changes of use. A planning application normally needs to be supported by a design and access statement that sets out the principles that have been applied to the proposal and then goes on to provide information about how inclusive access is to be achieved. It needs to make particular reference to the needs of disabled people, and can be used to explain any proposed reasonable adjustments to physical features of the building.



The Planning system can play an important role in facilitating social interaction and creating healthy, inclusive communities ... Local Planning Authorities should aim to involve all sections of the community in the development of Local Plans and in planning decisions, and should facilitate neighbourhood planning. Planning policies and decisions should ... aim to achieve places which promote ... (among other things) ... safe and accessible environments (and) developments.

*Extracts from Paragraph 69 of the National Planning Policy Framework. DCLG, March 2012.*

### **The Building Regulations 2010: Approved Document M (2004)**

Part M of the Building Regulations is about access to and use of buildings. It applies to material alterations of and extensions to non-domestic buildings and to material changes to some non-domestic uses. The regulation requires reasonable provision to be made for people to gain access to the building and to use its facilities. *Approved Document M* gives guidance on meeting the regulation and sets out minimum standards for access.

Following the guidance in *Approved Document M* can be a helpful way to establish reasonable provision under the Equality Act. Failing to meet the guidance need not automatically imply discrimination, however, as there may be other means of achieving the same end result. This approach is in line with the principles that underpin the protection of listed buildings, in that it can allow access to be provided in ways that avoid removing those features of a building which contribute to its significance, and thus to its listing.

### **Access statements and Part M of the Building Regulations**

Departure from the guidance set out in *Approved Document M* can be explained by an access statement supporting the application. In the case of existing buildings, and particularly in the case of historic buildings, such a statement will allow a designer to identify the constraints imposed by the existing structure and its immediate environment. Where full access proves to be impracticable or only achievable at disproportionate cost, compensatory measures can be proposed. Essentially the access statement is a way of demonstrating that every effort has been made to provide an inclusive environment and it should not be used to justify lower standards of access provision.



## Historic buildings and *Approved Document M*

The need to conserve the special characteristics of historic buildings is recognised in *Approved Document M*. The guidance states that the aim should be to improve accessibility where practically possible, provided that the work does not prejudice the character of the building or increase the risk of long-term deterioration to the building fabric or fittings.

Consultation with conservation and access officers is recommended, as well as taking into account the views of English Heritage and local access groups in order to make the building as accessible as possible.

## Listed building consent

Under the terms of the Planning (Listed Buildings and Conservation Areas) Act (1990) consent is required for any works of demolition, alteration or extension that will affect the character of a listed building,

including any associated structures and fittings within its curtilage. Listed building legislation applies to both internal and external changes, irrespective of whether features are identified separately in the list description. The advice of the local planning authority should be sought on the need for consent at an early stage in the design process.

When seeking listed building consent it is important to provide information about the architectural and historical significance of the building and to assess the likely impact of the access proposals in relation to this. The application must demonstrate why any potentially damaging works are necessary or desirable, thus establishing that a balance is being struck between conservation and access. If a detailed proposal is refused consent it may still be possible to achieve an acceptable alternative design solution through negotiation and resubmission. Even if consent continues to be refused, there is likely to be a means of appeal. Whether or not the service provider's duty to take all reasonable steps to ensure accessibility includes pursuing an appeal will depend on the circumstances of the case.

It may also be necessary to apply for listed building consent for temporary access measures, including those made in advance of permanent solutions being adopted, if these will affect the character of the building. The local planning authority will advise on the need for consent. Portable ramps that are not fixed in place and which are removed after use do not require consent.

### **BS 8300:2009 + A1:2010 Design of buildings and their approaches to meet the needs of disabled people. Code of practice**

BS 8300 provides guidance on good practice in the design of buildings and their approaches to allow convenient use by disabled people. The extent to which the standards apply to historic buildings will be determined on an individual basis. It should be noted that in certain respects guidance in the British Standard differs from that in *Approved Document M*.



The refurbished entrance to the Treasury in Horse Guards Road has a symmetrical arrangement of ramp and steps. High-quality design complements the refurbishment of the historic elements.

Stair lifts are visually intrusive and not an ideal access solution, but can provide access when it is impossible to accommodate a vertical lift. At Winchester Cathedral the scale of the background architecture helps reduce the visual impact.





## Ecclesiastical buildings

Some Christian denominations are exempted from the need to obtain listed building consent under the terms of the 1990 Planning Act, because they have consent procedures of their own which have been accepted by the Government as providing an appropriate level of protection for their historic buildings. For the Church of England, all places of worship (not just those which are listed) are subject to the Faculty Jurisdiction system, which balances the needs of worship and mission with care and conservation of the buildings. Other denominations with their own control systems are the Church in Wales, the Roman Catholic Church, the Methodist Church, the United Reformed Church and the Baptist Union of Great Britain. However, the service provider provisions of the Equality Act cover activities within places of worship, irrespective of the denomination.

Under the Church of England's Faculty Jurisdiction Rules, parishes proposing significant alterations to their listed church should provide a Statement of Significance and Statement of Need to be taken into account when changes to the buildings are proposed. This emphasises the principle, also set out in the Church of England's case law of consistory court judgements, that where changes are proposed to a listed church there should be a clear need for the works which is sufficient to outweigh the normal assumption against alteration. Improvements to access should be considered in this context, in the light of what is reasonable.

## Scheduled monument consent

As well as being listed, some historic buildings and their surroundings may be protected under the Ancient Monuments Act (1979). Consent is required for any work to an archaeological site or building that has been registered as a scheduled monument. Applications for consent are dealt with by the Department for Culture, Media and Sport, acting on advice from English Heritage.

The consent procedures will include four key principles: an application to an independent body, consultation with amenity bodies, consideration being given to the significance of the buildings themselves, and a right of appeal.



At All Souls Church, Langham Place, London, an inconspicuous handrail leads up the side of the porch steps and a shallow ramp to a side entrance leads to a lobby and passenger lift that serves the church and the crypt. Visual impact upon the porch, which is of critical significance to the streetscape and the church, is minimal.

## Historic gardens and landscapes

The parks, gardens and other designed landscapes associated with historic buildings may also be of special historic interest in their own right and therefore included on English Heritage's *Register of Parks and Gardens*. The Register contains a diverse range of sites: gardens, squares, cemeteries and parks. If planning permission is required for any proposed alterations, the local planning authority must consult the Garden History Society in all cases, and English Heritage in the case of gardens registered as grade I or II\*.

Where planning permission is not required but the proposed changes may affect the character or appearance of the garden or landscape, it is still advisable to seek professional guidance, especially in the case of ecclesiastical buildings, which will need denominational approval. Historic landscapes not included in the Register may be of considerable local value and any changes to their design, layout, character or appearance should be considered in this context.



At Stourhead, Wiltshire, the ramped path provides an alternative route adjacent to the garden steps.

If a building within a historic landscape is listed, changes to that landscape may also impact upon the setting of the building and should be considered in relation to the significance of both. Planning permission may be required for such changes, and the advice of the local planning authority should be sought.

Guidance on access to historic gardens and landscapes is given in English Heritage's companion guide, *Easy Access to Historic Landscapes*.

The ramped access at the Geffrye Museum in London has been designed as part of the sunken herb garden.



# Part 2:

## Planning better access

### What is reasonable?

#### The access strategy

Any organisation, be it a high-street retailer, museum or restaurant, that wants to make it easier for people to use its historic building is strongly advised to start by establishing an access strategy – a document that answers six simple questions:

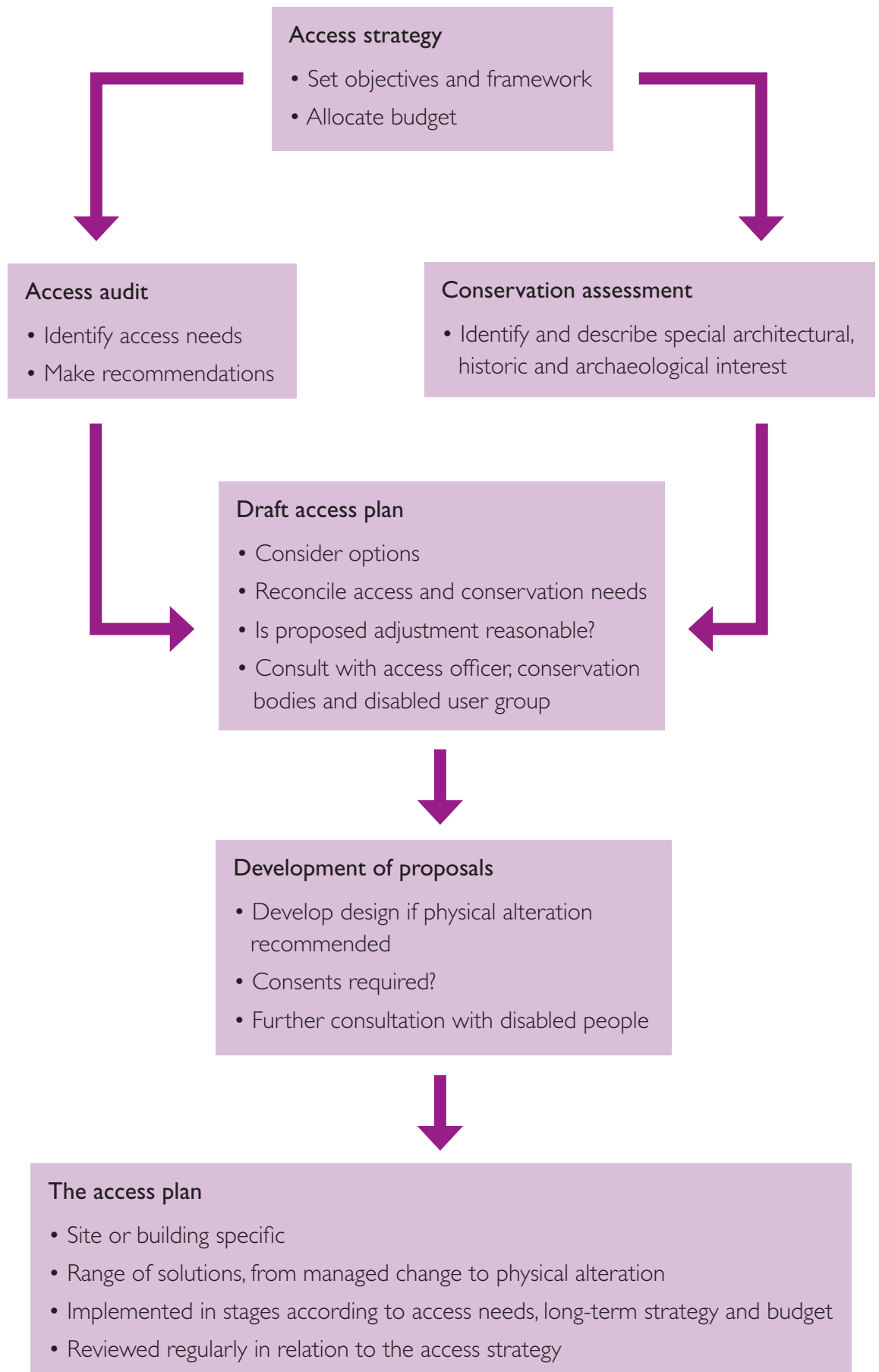
- what is it that needs to be improved – is it the building itself, the way it is managed or a combination of the two?
- what would be a reasonable adjustment?
- what are the statutory obligations that have to be met?
- which are the conservation considerations that need to be taken into account?
- who is going to be responsible for balancing these requirements?
- how much will it cost and how long is it going to take?

The secret of a successful strategy is clarity – making sure that the needs of visitors and users are as clearly understood as the sensitivities of the building that will be accommodating them. With careful planning it should be possible to provide suitable access for disabled people without compromising a building's special interest.

Strategic commitment from the top of the organisation is another vital component, as is the presence of someone who will be responsible for implementing and reviewing the measures identified in the access planning process.

The Equality Act requires service providers to make reasonable adjustments for disabled people in the way they deliver their services. However, the Act does not specify how a service provider should go about meeting its obligations; it is up to them to decide whether they need to physically alter an obstructing feature or whether they can find a way of avoiding it or providing the same service in an alternative way.

It is not always necessary to remove an obstacle. In many cases the same desired result can be achieved by providing alternative routes or re-organising the use of spaces, without any need for physical alterations. To avoid making the wrong decisions organisations and professionals should never undertake access works without first understanding which solutions would actually be preferred by disabled people themselves.



## The access audit

The first step in planning access improvements is to undertake an access audit. This will assess and document barriers to access which exist within a building and its surroundings. A good audit will consider the requirements of wheelchair users, ambulant disabled people and those with sensory impairments and learning disabilities. It will consider intellectual access as well as physical access and can take into account the needs of families with young children and older people.

It is helpful for the audit to follow the sequence of the visitor's journey through the building – from arrival on foot, by car or public transport, through entry into the building, access to each of the services and facilities provided and finally to the exit route. An audit can also consider how people would be helped to leave in the event of an emergency.

The purpose of the audit is to compare the existing situation with best-practice guidance, thereby helping to identify any barriers to access that there may be. The auditor will make recommendations about possible ways of improving access, taking into account the use and nature of the building. It is recommended that someone experienced in assessing access issues should carry out the audit. Reference could be made to the National Register of Access Consultants.

## The conservation assessment

A complementary part of the process will be to prepare a conservation assessment that establishes the significance of a building or site and its constituent parts in terms of its special architectural, historic or archaeological interest. These are usually prepared by architectural historians or conservation architects but amenity societies and local authorities may also be a source of guidance. In the case of ecclesiastical buildings, the statement of significance should provide the equivalent of a conservation assessment.

## The access plan

Once an access audit and conservation assessment have been completed it becomes possible to prepare a detailed access plan that reconciles, where necessary, the needs of access and conservation. The plan will consider options for improvement, identify needs and impacts, and look at what is likely to be a reasonable adjustment. This stage of the process should include consultation not only with access and conservation bodies but with disabled people themselves.

The aim of an access plan should be, as far as is reasonably practicable, to provide a standard of access for disabled people equal to that enjoyed by the rest of the public.



The access plan will normally have four related objectives:

- establish short and long-term aims in relation to opportunities
- set out proposed solutions, ranging from change of operational use to physical alteration
- identify statutory consents or other approvals that are required
- propose timescales for implementation.

Linked to maintenance and management procedures, the plan can also help ensure that access remains an ongoing priority. To make sure this happens it should be reviewed at regular intervals and used to record decisions and alterations to the original scheme and timetable.

#### **The role of the conservation officer**

The job of local authority building conservation officers is to provide specialist advice on the repair and maintenance of historic buildings. This can be particularly valuable if alterations to improve access are likely to need planning permission or listed building consent.

It is the detailed preparation of the access plan that will confirm the need for any alterations to a historic building, including those requiring listed building or scheduled monument consent. However, the process should begin by considering all the other options available – including the provision of the service by other means – and assessing the impact that each of these would have on the building's significance.

If there are any conflicts between the interests of access and conservation, it may be possible to reconcile these through creative and sensitive design. For financial and operational reasons physical works may need to be phased over a period of time, in which case the plan may need to allow for alternative ways of providing the service in the interim.

The access plan should not be restricted to wheelchair users. It also needs to consider the requirements of people with limited mobility, sensory impairments and learning disabilities, families with young children and older people. A well-drafted plan should be central to any organisation's strategic commitment to improving access. It also needs to be reviewed regularly so that the current provisions can be kept up-to-date, not only in terms of changes in regulations but also new technical solutions, both of which the service provider is duty-bound to take reasonable steps to comply with.

Focus groups made up of disabled people, or drawn from a local access group, can be invaluable in testing proposals before they are incorporated into the access plan. The finished plan can also be used both as the basis of any access statement required for statutory consents and to provide a useful record of decisions taken in relation to duties under the Equality Act.

### The role of the access officer

Access officers are normally based in the planning or building control departments of local authorities. As well as helping to develop access policies and design guidance, they advise on development proposals in relation to planning policy and Part M of the Building Regulations. They also facilitate local access groups made up of disabled people. All of this makes them invaluable sources of practical advice on access improvements so they should be consulted as early as possible in the development of an access plan.

### Management issues

No access plan will be truly successful unless it is underpinned by a commitment from the very top of the organisation to meet or exceed currently agreed standards of good practice. It also needs the backing of universal staff awareness brought about through a combination of training and ongoing management support. An accessible WC used to store cleaning materials rapidly ceases to be accessible; a cluttered reception desk with a profusion of leaflets and notices offers clear information to no one. Good access depends on the effective management of the whole service – in many instances a simple change in operational working can overcome an apparently stubborn physical access issue.



A successful access plan will consider a range of solutions, including management procedures and physical improvements.

No 1 Smithery, Chatham Historic Dockyard, is a scheduled monument and grade II\* listed. The restoration of the building includes a new accessible public entrance with ramp and steps. The scale of the façade allows this significant new addition.

© vHH/James Brittain



Power-assisted doors located in the returns of the portico at the Royal Opera House provide an easily accessible route.

## Funding for access improvements

Neither English Heritage nor the Heritage Lottery Fund (HLF) is in a position to provide the owners of historic buildings with money specifically to improve access. However, HLF can fund physical and sensory access improvements to historic buildings or sites (including places of worship) if they form part of a wider project to repair and open up the building or site to the public. HLF can also grant-aid the completion of an access audit as part of the development phase of a project.



At Ripon Town Hall the whole pavement has been ramped up to threshold level over the original steps, part of a scheme that included the addition of a lift and accessible toilets inside. Railings have been added because of the increase in kerb height, but no handrail has been provided for the steps.



# Barriers to access

## Overcoming barriers

First and foremost, the access planning process is about finding ways to overcome the barriers to access that are the concern of the Equality Act – and especially those relating to physical obstructions.

All service providers covered by the Equality Act are required to make whatever reasonable adjustments are necessary to ensure that disabled people are not put at a substantial disadvantage. Potential obstacles fall into two broad categories:

- external physical elements of the building and its setting, including landscape features, kerbs, exterior surfaces, paving, parking areas, building entrances and exits as well as emergency escape routes
- any feature arising from the design or construction of a building itself, including architectural details (such as plinths, column bases, staircases, ironwork and door openings), fixtures, fittings, furnishings, furniture, equipment and other materials.



King's Bench Walk, Inner Temple, London. A short-rise platform lift is positioned behind railings where it descends to basement level and connects to the primary circulation routes.





With a minor adjustment to liturgical practice, a church member in a wheelchair receives communion in the nave at the church of St James the Great, Colchester.



Cobbles and setts can be difficult for ambulant disabled people to walk on, especially if they are rough, uneven or open-jointed. At Brougham Castle, Cumbria, a smooth path is laid across an uneven surface to create a more accessible route.

It is important that each feature is properly understood, both in its own right and in the context of the whole building. Every effort should be made to leave features unchanged and visible if they contribute to the building's significance, character or composition. In some circumstances a reasonable adjustment may involve avoiding a feature rather than making an alteration.

The type of service or activity that takes place within the building will also be a major factor in determining the appropriate level of access and the required degree of alteration. The Equality Act lists the factors that affect whether a potential adjustment is seen as reasonable – the size and financial resources of an organisation are taken into account.

Any proposed change of use that involves service-provider or education functions needs careful consideration of the way in which the resultant access requirements could be accommodated within the existing structure.

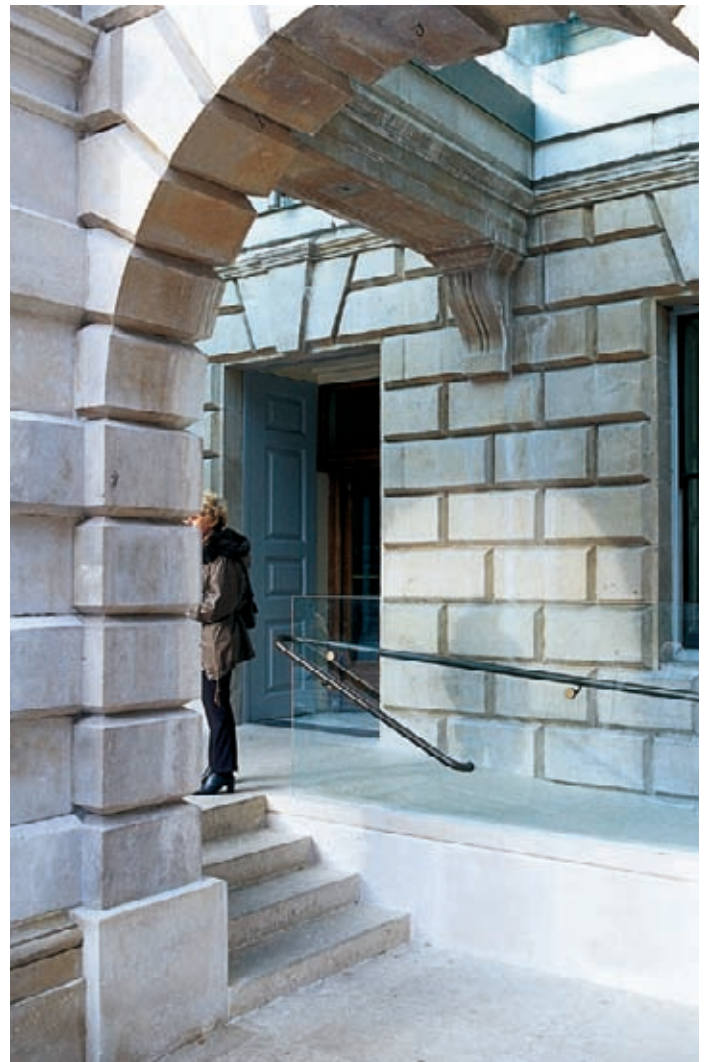
The Equality Act outlines four options for overcoming a barrier caused by a physical feature. These are:

- removal of the feature
- alterations to the feature
- providing a reasonable means of avoiding it
- providing the service by a reasonable alternative method if none of the preceding options is viable.



The Act does not prescribe which option should be considered first, but the Code of Practice recommends that service providers should start by considering whether the physical feature which creates a barrier can be removed or altered. This represents an inclusive approach to access because it makes services available to everyone in the same way. The Act requires that any means of avoiding the physical feature must be a 'reasonable' one. In determining reasonableness consideration should be given to the dignity of disabled

people and the extent to which they are caused inconvenience or anxiety. It should always be remembered that the aim is to achieve a standard of access for disabled people that is equal to that enjoyed by the rest of the public.



At the Royal Academy, Piccadilly, the permanent scheme (right) which replaced unsightly temporary ramps (left) involved the modification of the plinth to accommodate the raised courtyard levels. Picture to the left © Francis Ware

The new entrance arrangements at St John's Smith Square include a ramp from the pavement giving access to a lift serving internal levels.



### Dialogue and discussion

English Heritage encourages early pre-application consultation with local-authority conservation, building control, access and archaeology staff; with local access groups and, in the case of major buildings undergoing potentially substantial alterations, with its own staff. In many planning departments, applications involving access provisions are reviewed by an access officer, who should be able to advise on the suitability of the proposed solutions, or recommend alternative sources of advice and guidance. Continuous dialogue and feedback from users can ease the handling of applications for listed building and other consents, and help to achieve solutions which satisfactorily combine access and conservation.



The stone balustrade has been cut through on one side of the entrance to the Seaman's Hall at Somerset House to provide ramped access.





## Removing the feature

It may be the case that those features which form a barrier are also those which make up the special interest of the building – a narrow doorway or staircase for example. In this case, removal is unlikely to constitute a reasonable adjustment. Additive change is more likely to be appropriate than destructive change. It may be the case that when balancing the long-term future of the building with the short-term needs of its occupants a reversible semi-permanent solution may be the most appropriate.

To determine reasonableness, it will be essential to assess the relative contribution such features make to the building as a whole, and to set this against the costs and benefits which removal might bring. Frequency of use could also be a significant issue when making this assessment.

## Altering the feature

It may be possible to make alterations without adversely affecting the historic fabric or quality of the building. Alternatives that look beyond standard solutions might include the sympathetic reduction, rather than removal, of physical features. Where it is not possible to adhere completely to the design standard recommended in BS 8300 or *Approved Document M* of the Building Regulations, the access statement can be used to identify the constraints imposed by the existing structure and justify the proposed reasonable adjustment.

The Christopher Wren-designed church of St James sits between Piccadilly and Jermyn streets, which are at different levels. Level access has been achieved from Jermyn Street by altering a window to form a doorway, which is located in a 19th-century addition to the original body of the church and deemed less sensitive.



Visitor using the interactive display in the Visitor Centre at Knole, Kent.

© National Trust Images/Stuart Cox



These before and after photographs show the removal of steps and the lowering of the entrance levels at the United Church, Winchester.

Picture below: © Joe Low



At St Michael's House in Cambridge access has been provided to the café and exhibition space. The scheme does not meet all the provisions of *Approved Document M* of the Building Regulations but still provides a reasonable standard of access.

## Finding ways round barriers to access

It may be possible to avoid the feature that creates a barrier by changing the way in which a building is managed, perhaps by providing access via a side route or by opening up a secondary main entrance. The principal entrance may still be available, but the preferred option would be to ensure that everyone uses the accessible entrance. This may require further changes to the management of the building and to the use of its internal spaces. Circulation routes within a building could be adjusted to avoid barriers such as stepped thresholds and narrow doorways.

## Providing the service in another way

This option can be considered in addition to the approaches discussed above or where physical changes have been considered and rejected. However, this approach alone may not be considered reasonable if one of the other options would have provided a more inclusive service for all users. In considering this option, service providers might investigate, for example:

- relocating public services from the upper to the ground floor, in order to overcome barriers to access
- using print, computer or audio-visual means to provide access to the service, where physical barriers cannot be overcome.

It is recommended that disabled users of the service should be consulted to establish the acceptability of providing the service in a different way to that offered to others.





Picture above: At Morley Town Hall in West Yorkshire an accessible principal entrance has been created at the side of the building, making use of the sloping pavement to provide level access.

Picture right: At the Queen's House in Greenwich level access has been provided at basement level by forming a gently dished semicircular forecourt in front of an existing central door opening on the north front. The new paved route forms the access for all public visitors.

© Peter Cook /VIEW



### Reasonable adjustments in practice

The Equality Act Code of Practice guidance for service providers gives a list of measures that can be taken to identify or make reasonable adjustments:

- planning in advance for the requirements of disabled people and reviewing the reasonable adjustments in place
- conducting access audits on premises
- asking disabled customers for their views on reasonable adjustments
- consulting local and national disability groups
- drawing disabled people's attention to relevant reasonable adjustments so they know they can use the service
- properly maintaining auxiliary aids and having contingency plans in place in case of the failure of the auxiliary aid
- training employees to appreciate how to respond to requests for reasonable adjustment
- encouraging employees to develop additional serving skills for disabled people (for example, communicating with hearing-impaired people);
- ensuring that employees are aware of the duty to make reasonable adjustments and understand how to communicate with disabled customers so that such adjustments can be identified and made.



At the Lady Lever Art Gallery in Port Sunlight the public entrance was relocated to the west elevation and a new ramp introduced to provide access to the main gallery. A glass balustrade and the use of concrete matching the colour of the limestone cladding limits the visual impact of the new intervention.

© Chester Masonry

At Cragside, near Morpeth, a touch-screen computer provides a virtual tour of parts of the house that are inaccessible.

© National Trust

# Part 3: Making access a reality

## Practical advice and examples

Easy physical access involves people being able to circulate freely and cope with changes in level. Horizontal movement is most likely to be constrained by floor surfaces, corridors, doorways, thresholds and small changes in level. Improvements to vertical circulation may require alterations to steps, stairs and handrails or involve the introduction of ramps or lifts. All of these can affect the appearance and significance of the building. Path surfaces, steps and gradients present similar issues in parks and gardens and much of the guidance below will be equally applicable to outdoor environments.

What follows is an overview of situations in which difficult decisions often need to be made. Some of the examples may not conform strictly to guidance in *Approved Document M* of the Building Regulations but nevertheless achieve a successful balance between reasonable adjustment and the sensitivities of historic places.

Where there is a physical barrier, the service provider's aim should be to make its services accessible to disabled people and, in particular, to provide access to a service as close as it is reasonably possible to get to the standard normally offered to the public at large. When considering which option to adopt, service providers must balance and compare the alternatives in light of the policy of the Act, which is, as far as is reasonably practicable, to approximate the access enjoyed by disabled persons to that enjoyed by the rest of the public.

*Equality Act 2010 Statutory Code of Practice: Services, Public Functions and Associations, 2011, page 106, 7.58*





Asymmetrical elevations can accommodate alteration more easily. The addition of this significant ramp at Ealing Town Hall does not upset the balance of the overall composition and the design and use of materials is sympathetic.



At Huddersfield station the asymmetry of a single ramp rising to the portico is insignificant when seen against the heroic scale of the larger design.



At Manchester Art Gallery the symmetrical composition of the main façade is not disturbed by the ramp, which rises to the portico entrance on one side only.

## Horizontal movement

### Making an entrance

The aim should be to make a building's main entrance accessible to everyone on a permanent basis. Conservation constraints may arise from the design and character of the building's façade and setting and each building will have its own characteristics, which should, as far as possible, be respected in considering alterations for access.

Classical buildings, for example, are usually built to a single, unified plan that follows strict rules of symmetry and proportion. Derived from the idea of a temple, the entrance is often set upon a base and approached by a flight of steps. Alterations to such buildings need to respect these rules, although sometimes relatively small-scale changes may break them without significantly affecting the appearance.

Symmetry may be less of an issue in other types of less formal architecture. Proportion and balance will still be important, but greater flexibility may allow, for example, the insertion of a single asymmetrical ramp.

Georgian and Victorian terraced houses with steps up to the front door can pose seemingly intractable problems in relation to access. Alternative entrance points such as a mews may be available. Alternatively a basement area between the building and the pavement may allow the incorporation of a platform lift to provide access from



A Minton tile floor, such as this one underneath matting at Osborne House, is particularly vulnerable to both foot traffic and wheelchairs and needs to be protected.



Many entrances to 18th-century and 19th-century terraced town houses have steps up to the front entrance, along with a basement area. An external platform lift was installed within the basement area of this London house, the steps and landing altered and the railings adapted in keeping with the existing design. A lift was installed within the house. The house has since been sold and the platform lift removed.

street level to the basement floor. Platform lifts can often be visually less intrusive than ramps over basement areas.

In urban locations, space in front of buildings will frequently be restricted. Where it is available, it may be possible to re-grade the pedestrian approach up to or within a porch or portico. Where an existing entrance cannot be adapted it may be possible to form a new accessible entrance for everyone to use.

## Inside the building

Large secular buildings were often designed with a hierarchy of spaces and a prescribed sequence of movement through the building – the entrance hall, principal staircase, primary corridor and principal rooms. The form and decoration of each of these spaces may be part of the building's special interest and the visual impact of any

alteration must be carefully considered. In smaller buildings there may simply be too little space for additions such as ramps or lifts, while the visual impact might be equally damaging.

When dealing with level changes and restricted space, the conservation concerns are likely to centre on issues of scale, proportion and continuity in materials, design and finish, as well as structural factors affecting corridor widths and floor levels.

## Floors

Routes through buildings need to be free of trip hazards and smooth enough for easy wheelchair use. However, the levelling or alteration of historic floors should only be considered as a last resort once other less potentially damaging options have been fully considered.



If the historic floor surface is particularly fragile, it is likely to require protection against foot traffic and wheelchairs, especially the heavy electrically powered ones. A temporary covering, removable for occasional viewing, may be the only appropriate answer. In such cases, fully accessible information about the floor and its importance should be available near by.

Over-polished floors can be hazardous and slip-resistant finishes are important, particularly in areas where the floor may become wet. Loose rugs without any underlay to anchor them or with edges creating a trip hazard should also be avoided. Thick pile carpets can hinder wheelchair passage.

## Doors and openings

Door and window openings establish the character of an elevation and are an integral part of the façade; alterations to their proportions or detail should generally be avoided.

Where the principal entrance is a key element in the design of a building façade, the door frame or surround and the door itself are likely to be significant. Alteration may be possible but should be carefully considered. In the case of heavy doors it may be possible to add a powered opening device or at least a bell to call for assistance.

Standard guidance recommends an 800mm clear opening for a head-on approach, although the majority of manually propelled wheelchairs can manage with slightly less than this. A compromise may therefore be

possible, subject to consultation. *Approved Document M* suggests a minimum clear width of 750mm in existing buildings.

Room to manoeuvre alongside the leading edge of a door is particularly important. Where space is inadequate and an alternative route is not feasible, doors could be held open or even removed.

Wheelchairs and other mobility aids can inadvertently damage narrow door cases and joinery. Applied protection may be necessary to safeguard the historic fabric.

Double doors with narrow leaves can also pose a problem as it can be difficult for a wheelchair user to open both doors together. Doors can be held open with electromagnetic catches, linked if necessary to a fire alarm system. Powered opening may be possible, although the addition of devices may cause damage to joinery. It may even be possible to fix the leaves together to act as a single door. Sometimes leaves may have to be replaced with ones of unequal width, to provide a clear 800mm opening on one side.

The addition of vision panels in important historic doors is rarely acceptable. It is more usual to hold doors open to achieve improved access.

Every effort should be made to retain historic door furniture or traditional ironmongery that is integral to the design and character of the door. Automating the door opening or relying on staff assistance is likely to be preferable to replacing significant fittings with lever-type handles.



provided, though care should be taken to ensure they are used safely.

In timber-framed buildings every effort should be made to avoid cutting sill plates or other framing members that contribute to the building's structural integrity. A bevelled fillet on either side can resolve a small difference in height. If sill plates are to be covered by a raised floor or ramp, care should be taken to maintain ventilation and avoid moisture entrapment, which can lead to timber decay.

## Corridors

Circulation routes must allow easy movement and provide a sense of location and direction. The preferred unobstructed width of a corridor is 1200mm, though 1800mm is recommended to allow wheelchair users to pass each other.

## Visual contrast

Visual contrast can be a useful way to distinguish floor and wall surfaces and thus help people to orient themselves. Contrasting colour for doors or door frames and potential obstructions will also help them to move around safely. Light reflectance values (LRV) should be checked to ensure adequate contrast.

Visual contrast to step nosings is recommended and can be particularly helpful for people with visual impairments. Contrasting nosings can be provided on carpeted stairs, removable paint can be used if appropriate and where alteration is not possible directional lighting can help provide shadow contrast.

Removal of original timbers in significant buildings should be avoided, especially when integral to the frame construction. Exposed sill plates across thresholds, such as this one at Deal Castle in Kent, typically pose a problem. A reversible ramp to provide access across the threshold is likely to be preferable to raising the floor locally.

Consideration should be given to the height, ease of use and visual contrast between the handle and door. Self-closing mechanisms with an abrupt or heavy action should be regularly adjusted to their minimum operating pressure.

## Thresholds

The generally accepted maximum raised threshold over which an independent wheelchair user can manoeuvre is 15mm, although in practice some people may be able to negotiate a slightly higher one, especially if the leading edge is bevelled. Short temporary threshold ramps can be



Access improvements at the Almeida Theatre, London, were part of a larger project. The foyer ramp gives access to the stalls seating area.

The addition of a carefully detailed external structure has improved access to this civic building in Corsham, Wiltshire, while not compromising its appearance.

© Wiltshire Council

Modifications to the relatively modern bridge to the Inner Ward at Barnard Castle, Co Durham, replaced steps with a ramp, giving an accessible main visitor route.

A ramp made by sloping the paving at the west front of Winchester Cathedral created an accessible route into the building.





## Vertical movement

### Ramps

Ramps are usually preferable to platform lifts and can provide easy and convenient access provided gradients are not too steep or too long. They also tend to be cheaper and much easier to maintain. However, where changes of level are too great, where there is inadequate space or there is an established need to protect architectural or archaeological features, a lift may still have to be considered.

Any slope of 1:20 or steeper is defined as a ramp by *Approved Document M*. Gradients should be as shallow as practicable as steep slopes create difficulties for some wheelchair users and ambulant disabled people. Standard guidance advises a maximum gradient of 1:12 for a distance of up to 2m between level landings. A longer ramp is acceptable where the gradient is shallower and suitable landings are provided. In exceptional circumstances, steeper grades over shorter distances may be preferable to no ramp at all, although these will not be suitable for some wheelchair users without assistance and care should be taken to ensure safe use. Electrically powered wheelchairs can generally cope with steeper slopes than manually propelled ones. The case for a steeper or longer ramp than that recommended in the *Approved Document M* would need to be made in the Access Statement.



At St James' Church, Colchester, the level change at the north porch is more than a metre. A removable ramp at the south door provides access until a permanent solution is provided.



Removable ramps tend to remain in place for several years. They rarely represent a satisfactory architectural solution but can be used out of necessity while a well-designed permanent solution is being agreed.



Removable timber ramps, such as this one at Richmond Castle in North Yorkshire, can provide access where a permanent intervention is not possible.

When forming permanent ramps and raising floor levels, account should be taken of design features such as skirtings, plinths or dado rails. These can often make important contributions to the scale and proportion of a room.

Temporary ramps can have a detrimental visual impact and are unlikely to provide a satisfactory long-term solution to access problems. However, they may be considered a reasonable adjustment prior to the provision of a planned permanent solution, or where access may be needed for a relatively short period in a building's life, or where use is infrequent. Temporary measures should be made to the same standards of design and construction as permanent interventions, not least because they may also require formal approval. Just like permanent arrangements, they should seek to minimise visual impact and to provide the greatest possible degree of integration and independence.

In places of worship, changes in floor levels may have historical and liturgical significance. Where level changes are not great a temporary ramp might be considered though a permanent intervention, carefully designed to respect the historic integrity of its surroundings, is always preferable.

The use of portable ramps has management implications, such as the availability of staff to erect and remove them as required and to ensure their safe use. They may be used from time to time for a single visitor, or periodically for an event lasting several days. As well as avoiding the risk of visual intrusion, portable ramps may also be preferable for smaller properties or those where wheelchair use is infrequent. Appropriate staffing arrangements, training and storage space are integral parts of the solution.

A ramp to one side of the entrance to the Foundling Museum, London, sits behind an existing wall. The new central handrail to the steps allows for left and right-hand use.



It may not be possible or desirable to alter some stairs. Where this is the case alternative forms of access, such as a virtual tour, could be considered.







This stair at Manchester Town hall has a handrail to one side only, not meeting current guidance. The addition of a secondary handrail was not deemed necessary because lift access is available near by.



The new handrail at Huddersfield station is in keeping with its context.



The original handrail at the Walker Art Gallery in Liverpool does not comply with current profile recommendations and does not project 300mm beyond the top riser because it abuts the pilaster. No changes have been proposed as a nearby lift provides alternative access.

Many ambulant disabled people do not find ramps easy to use. Where a change of level is greater than 300mm it is recommended that steps are provided as well as a ramp. Changes of level of 2m or more should be accompanied by an alternative means of access such as a lift.

## Stairs and landings

The principal staircase is often the major element in the most important public space within a building. It is therefore likely to be of considerable architectural and historic importance. Such staircases often fail to comply with current standards and changing them is likely to be contentious. An alternative solution may be possible if there is a secondary staircase that would be less sensitive to alteration.

## Handrails

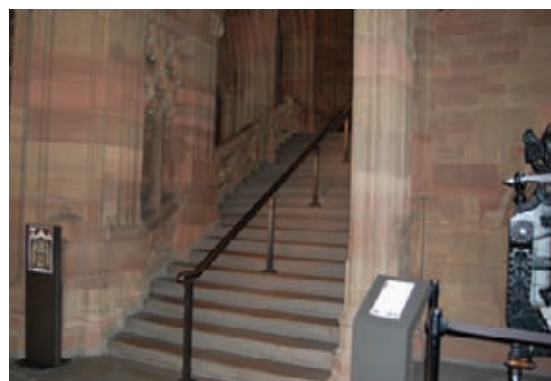
Handrails are highly visible and so represent a critical design issue. The introduction of new handrails to stairs will inevitably impact upon the character of existing spaces and features, even when designed with great care and sensitivity. Detailed design studies, supported by accurate drawings and visualisations, are essential if such interventions are to be properly planned and their impact fully understood.

In older buildings, handrails were not generally designed to extend 300mm beyond the first or last riser, or to have the currently recommended profile. Where handrails do not extend or have a profile that cannot be gripped it may be possible to insert a more suitable additional rail.

A mock-up (picture above right) was used to investigate the visual impact of the proposed handrail at the grade I listed John Rylands Library, Manchester, before the permanent installation. The resulting permanent handrail (below) has been designed to relate to the very high-quality bronze work in the library. The central location improves access to the stairs with minimal impact on the building fabric.

Current standards require all flights of steps to have handrails on both sides and additional central handrails where a flight is more than 1800mm wide. On wider flights where side handrails cannot be provided a single, central handrail gives the desired left- and right-hand option. On narrow stairways, one good handrail is better than none.

The historic context of a staircase may suggest the replication of an existing handrail design which does not fully comply with guidance in *Approved Document M*, but which could nonetheless be regarded as a reasonable adjustment. Where conservation and aesthetic considerations require the retention of non-compliant but historic handrails then this issue should be raised in the Access Statement.



This handrail at the Bank of England shows how it is possible to form new versions that match existing designs and materials.





At the Victoria and Albert Museum in London long symmetrical shallow ramps have been combined with steps that complement the scale of the Cromwell Road frontage. There is one central handrail to the steps.



A new accessible entrance at Tate Britain has wide steps and ramps.



This elegant solution at the Royal Institute of British Architects overcomes a small change of level at the entrance.



The once-derelict grade I listed church of St Luke in London has been converted into a community and music education centre for the London Symphony Orchestra. Access improvements to the entrance are sensitive to the architectural importance of the building.

© Matthew Weinreb – imeagefind.com



At the Queen's House in Greenwich a new staircase replaced a service stair that had been altered and so had potential for further change. The new stair allowed for the construction of a lift in the stair well. While not meeting all the standards in *Approved Document M*, the lift does provide access to upper floor levels for the first time.

© Peter Cook / View

A lift at Blickling Hall in Norfolk has been located within one of the turrets without damage to the internal structure.



## Lifts

The best way to provide accessible circulation between different floors of a building is to install an integrated and suitably sized passenger lift. As well as helping wheelchair users it can also be of benefit to ambulant disabled people, older people and people with pushchairs. A passenger lift is more likely to be feasible in larger buildings. Where space is at a premium, or a lower-cost solution is required, a short-rise platform lift may be a more viable solution.

Passenger and platform lifts are best located in the less-sensitive parts of historic buildings, for example secondary staircases and light wells or in areas that have already been disturbed or altered. Pits and openings for lift shafts should be carefully located to avoid loss or damage to significant timbers, archaeological remains or decorative surfaces.

Lift controls should be designed for ease of use by everyone and should incorporate tactile, visually contrasting illuminated buttons set at an appropriate height and location. Audible information can help people using and waiting for the lift.

The lift car should be large enough to accommodate any type of wheelchair with at least one other passenger. A lift car 2000mm wide by 1400mm deep will accommodate most scooters and allow wheelchair users to turn through 180 degrees. It may also be more suitable where there is heavy visitor use.



In some historic buildings, a smaller car may be the only option. The minimum size needed to accommodate one wheelchair user and a companion is 1400mm deep by 1100mm wide. If circumstances allow, it should operate as a through lift, with doors on opposite sides, so that the wheelchair user does not have to turn round or reverse on exit. This also applies to short-rise platform lifts.

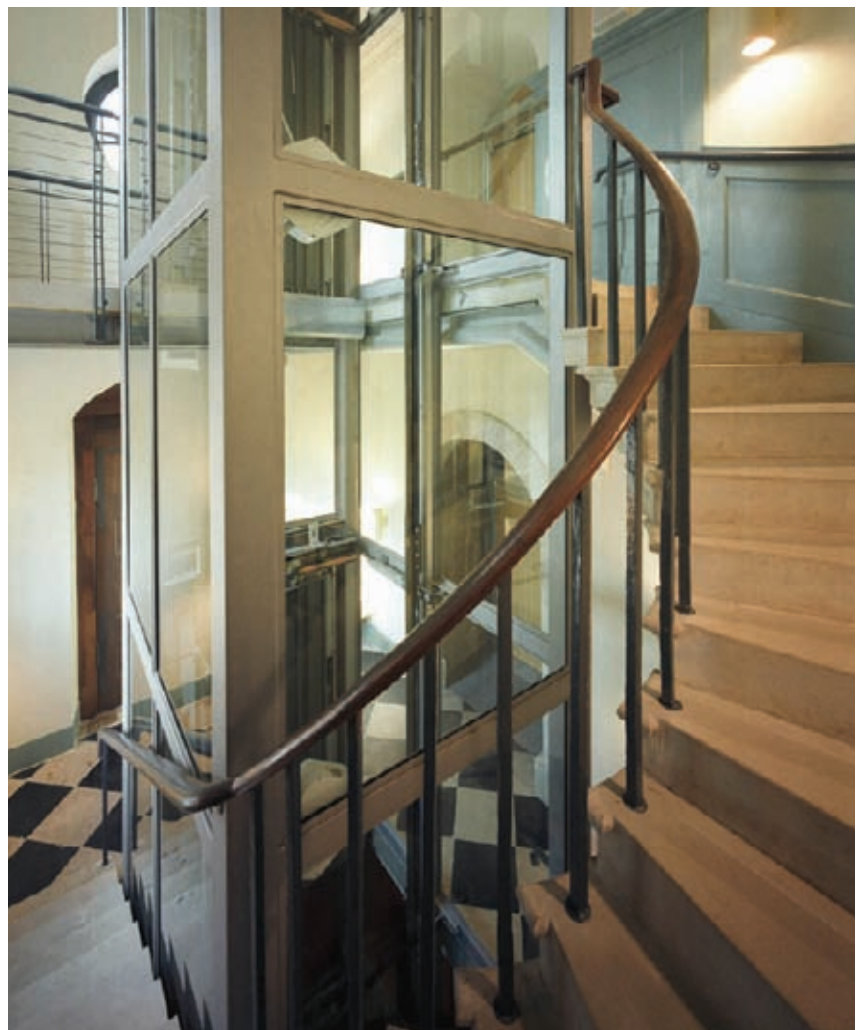
Whatever the type of lift, requirements for ongoing maintenance and management should not be overlooked, particularly in the case of external lifts that are exposed to the elements.

Certain passenger lifts and most platform lifts avoid the need for expensive and space-consuming overruns and lifts pits. Short-rise platform lifts offer scope for level changes up to 4m if contained within an enclosed lift shaft. The minimum platform size required to accommodate a wheelchair user is 800mm wide by 1250mm where the platform is not enclosed and 900mm wide by 1400mm deep when it is. An enclosed platform 1100mm wide by 1400mm deep will accommodate an accompanied wheelchair user and is the smallest that will allow two doors located at 90 degrees to one another.

At St Luke's Church in London the rebuilding of an unsafe internal staircase allowed space for a lift, making all levels accessible.

© Matthew Weinreb – imeagefind.com

These sensitively designed steps with adjacent platform lift at the main entrance to St Mary's Church in Beverley overcome a substantial change of level and provide improved access for everyone.





Traditional stair or platform lifts that follow the incline of a stair should only be used where standard passenger or platform lifts cannot be installed. They tend to be unpopular with disabled people and can be undignified or impossible for some people to use. They may also create unacceptable visual intrusion and cannot be fitted to a staircase on an escape route if they constitute a hazard or reduce the width of the stairway to less than the acceptable minimum. They should only be considered as a last resort when it is impossible to accommodate a vertical lift or ramp or where alternative routes are not available.

This platform lift at Lambeth Palace has been carefully designed with glass sides and matching floor finish. The lift and stair do not detract from their surroundings.

© Dennis Gilbert / VIEW

At St George's, Brandon Hill, in Bristol external hydraulic lifts provide access at two level changes between the upper churchyard car park and the church, which is now a concert hall. The lifts have also proved useful in moving heavier equipment and large instruments.

At Eastbury Manor, Barking, the entrance lobby floor can be raised to form a ramp to overcome a level change at the entrance.





Stair climbers are devices that are attached to wheelchairs to allow them to be transported up or down a flight of stairs. They must be operated by trained staff, do not serve all types of wheelchair, nor do they resolve the access problems of those who have difficulties with steps. They may also cause embarrassment and can give

rise to anxiety because of their perceived lack of safety. The damage they can do to stair treads may also make them unsuitable for use on significant historic staircases. A stair climber may be the only solution to some access problems but should only be considered when there is no other practical option.

A wheelchair platform lift was provided when the stairs to the Saint's Chapel at St Albans Cathedral were rebuilt. The area was carefully excavated by the cathedral archaeologist before construction went ahead. The lift motor is housed below the steps so cannot be heard.

© Dennis Gilbert /VIEW



## Emergency escape

Ways out must be considered alongside ways in. Responsibility for providing an adequate means of escape for everyone using a building rests with the building management or service providers. Emergency plans should allow for evacuation without reliance on the fire service, and should be drawn up following consultation with the fire officer and disabled users of the building to ensure their needs are taken into account. All staff who may be expected to help with the evacuation of disabled people should receive appropriate training.

The Regulatory Reform (Fire Safety) Order 2005 sets out requirements for fire safety and is supported by a number of supplementary guides including *Fire Safety Risk Assessment – Means of Escape for Disabled People*. Guidance is also given in BS 9999: 2008 *Code of Practice for Fire Safety in the Design, Management and Use of Buildings*.

Disabled people may be able to evacuate themselves from ground-floor accommodation but need assistance with escape from higher or lower floor levels. It may be necessary to provide fire-protected places of refuge adjacent to staircases where people can safely wait for assistance. An evacuation lift is the preferred form of escape and increasingly used as an alternative to carrying wheelchair users down the stairs. Guidance on evacuation lifts is given in BS 9999.

Emergency evacuation plans should be sufficiently flexible to meet the needs of disabled visitors whose specific requirements cannot be identified in advance. Separate plans for disabled employees can be tailored to their particular needs and the known availability of assistance.

Evacuation chairs can form a useful part of an emergency escape strategy, but some people may be unable to transfer to a chair or may prefer to be carried in their wheelchair.



These fire doors at Winchester Cathedral were sensitively designed and custom made to fit a range of openings.



# Lighting, signs and information

## Lighting

Good lighting allows people to move easily and safely into and around buildings. Effectively used, it can make obstacles appear more obvious and provide guidance along routes.

Lighting should avoid glare, pools of bright light and areas of deep shadow. Interior lighting schemes may need to be supplemented by sensitively positioned additional fittings to ensure that appropriate levels of illumination are achieved, particularly where there are stairs or changes in level. For example, window blinds can be a useful method of eliminating glare or confusing shadows at certain times of the day.

Sudden changes in light levels should be avoided, and areas of transition from bright to dimly lit space should be created where possible. It can be helpful to provide a place to rest or pause and become accustomed to the lower levels of lighting. While high-contrast lighting schemes that enhance the dramatic effect of a building or space are becoming increasingly common, it is usually possible to ensure that lighting levels are more consistent in those areas where safety may be an issue.

At St Luke's Church in London signs are designed to be easy to read. This sign can also be played like a xylophone, with a different note for each location.

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## Signs

Signs should be simple, short, easily understood and located where they will be well lit and clearly visible. Exterior signs need to identify the accessible entrance if this is not also the main entrance. Signs can also indicate distances to key features or areas, the presence and gradient of inclines, and how assistance may be obtained.

Clear and easily visible signs designed to a consistent style help everyone – for example, people who are deaf or hearing impaired may be reluctant to ask for directions in case they are unable to hear or decipher the response. Signs using symbols are useful for people with learning disabilities and visitors whose first language is not English.



Picture top left: Some people, such as this visitor to Dyrham Park, will require information in alternative formats, such as Braille.

© National Trust Images/ David Levenson

Picture below: Accessible information can be provided in a range of ways, as here at the National Trust's 'Back to Backs' in Birmingham.

© National Trust Images/ David Levenson





Use of trained staff to provide guided tours can be part of an overall access strategy.

© National Trust / Bob Bishop



English Heritage produces a guide to give information on access for visitors to its properties.

In general the signboard should contrast with its background and the lettering should contrast with the signboard. Lower-case lettering with opening capitals is generally easier to read than all capitals. The size of the lettering also needs to be appropriate for the distance from which it will be viewed. The sign itself should be at a height that allows it to be seen in crowded areas or where queues are likely. Braille and embossed information may be incorporated in signs in a historic interior, provided it is done with sensitivity, although it will always be most effective as part of an integrated communication scheme. Tactile signs are only useful if placed where they can be easily reached.

Wherever signs are to be positioned, careful consideration needs to be given to the way they are fixed and the impact they will have on the character of the space to which they are being added. Free-standing signs may sometimes be more appropriate than permanently mounted ones, for example when events are taking place.

## Information

Comprehensive information about access, itself in accessible formats, is often most usefully provided in advance of a visit. An access guide can be sent out as a leaflet or provided on a website to allow people to plan their visit. As well as explaining how the building can be reached by public transport it will describe the parking facilities and access arrangements in and around the building, highlighting any access restrictions and alternative provisions that have been made.

All staff, and especially those who deal with the public, should be familiar with the requirements of disabled people, and with the facilities available to them. Training of this kind requires a strategic commitment on the part of any organisation and is particularly effective when it is specifically targeted towards each person's role.

## Landscape and settings

An accompanying English Heritage guide *Easy Access to Historic Landscapes* has been produced to help property owners and managers make their historic landscapes more accessible to all visitors. Like this document, it provides guidance on achieving a balance between access and conservation and gives examples of good practice.

English Heritage's streetscape manuals, *Streets for All*, set out principles of good practice for street management – such as reducing clutter, co-ordinating design and reinforcing local character. The manuals, covering each of the English regions, provide advice on street design that reflects the region's historic character.

Access to a building and its surroundings, or to wider historic landscapes, should always be considered from the point of arrival, whether by foot, car or public transport. Many historic paths or drives are made of cobble or sett paving, riven stone slabs or gravel, all of which can represent a barrier to access. These materials are nonetheless often an integral part of the significance and character of the landscape.



In Tunbridge Wells, where the paving tradition is red and blue brick, the tactile surface at crossings is made with brick paviors.

The various types of tactile paving can be formed using natural stone.

Tactile blister paving in Chichester is made with machined York stone to integrate into the surrounding paving.





The compressed hoggin path to the South Terrace at Kenwood House in London provides a suitable surface for all to use while still being appropriate in the historic landscape setting.



These two photographs show gravel paths at Audley End House. Deep gravel can cause difficulties for wheelchair users and others; bound gravel will provide a firmer and more even surface.



Carefully positioned level areas can provide resting places on long routes.



At the Tower of London a smoother route has been provided with paving slabs set into an area of stone setts.



As with buildings, easy access to gardens and landscapes is best achieved by understanding their significance and the needs of users, thereby balancing the needs of access and conservation. Examples of adjustments that could be considered and evaluated include:

- replacing existing gravel surfaces with self-binding gravel to provide a firmer surface
- relaying stone setts with tighter joints or pointing them to form a less recessed joint
- incorporating a level route within an area which has an uneven surface
- introducing alternative routes through a park or to a building, and adding appropriate signs
- introducing alternative routes which give access to certain key features and views within the landscape, while acknowledging that it may not be possible to access all areas
- using interpretation or multimedia devices to provide alternative access to those areas that will remain physically inaccessible
- taking full advantage of the sensory qualities of all gardens and landscapes, and of seasonal changes
- providing handrails, powered mobility vehicles and frequent resting places to maximise access for as many people as possible
- use of trained staff and guided tours as an alternative to making physical changes.

## Street furniture and seating

Service providers should think carefully about the design, location and justification for street furniture such as interpretation panels, bollards, cycle racks, free-standing signs, lamp-posts and waste bins. These can become obstacles when set on pedestrian routes. Grouping items together can make them more easily visible and thus less of a hazard.

Benches and internal seating should offer a range of heights and a choice between those with and without backs and armrests. There should also be space for a wheelchair user to pull up next to a seated companion. Tables, where they are provided, should be wheelchair accessible.



Bollards should only be used when absolutely necessary. Visual contrast will increase the visibility of these and other potential obstacles.



Picture above: Tables such as this one, provided by the National Trust at Plas Newydd, Anglesey, allow wheelchair users to sit next to seated companions and also give space for pushchairs.

© National Trust



Picture right: This interpretation panel at St Augustine's Abbey is carefully positioned to allow use by all visitors.



# Published sources of information

## Primary legislation

*Ancient Monuments and Archaeological Areas Act 1979*

*Equality Act 2010*

*Planning Act 2008*

*Planning and Compulsory Purchase Act 2004*

*Planning (Listed Buildings and Conservation Areas) Act 1990*

*Special Educational Needs and Disability Act 2001*

*Town and Country Planning Act 1990*

## Official guidance and policy documents

Building Regulations 2010. *Approved Document M: Access to and Use of Buildings*. 2004 edition with 2010 amendments

BS 7913:1998. *Guide to the Principles of the Conservation of Historic Buildings*. British Standards Institute, 1998

BS 8300:2009+A1:2010. *Design of Buildings and their Approaches to Meet the Needs of Disabled People: Code of Practice*. British Standards Institute, 2010

BS 9999:2008. *Code of Practice for Fire Safety in the Design, Management and Use of Buildings*. British Standards Institute, 2008

*Conservation Plan Guidance*. Heritage Lottery Fund, 2012

*Equality Act 2010 Code of Practice: Employment Statutory Code of Practice*. Equality and Human Rights Commission, 2011

*Equality Act 2010 Code of Practice: Services, Public Functions and Associations Statutory Code of Practice*. London: Equality and Human Rights Commission, 2011

*Making Your Project Accessible for Disabled People*. Heritage Lottery Fund, 2012

*National Planning Policy Framework*. Department for Communities and Local Government, 2012

*PPS5: Planning for the Historic Environment Planning Practice Guide*. Department for Communities and Local Government, 2010



## Sources of publications and information

British Standards are available from the British Standards Institution at [www.bsigroup.co.uk](http://www.bsigroup.co.uk)

Equality and Human Rights Commission (EHRC) publications can be downloaded at [www.equalityhumanrights.com](http://www.equalityhumanrights.com)

English Heritage publications are available from [www.english-heritage.org.uk](http://www.english-heritage.org.uk)

Building Regulations Approved documents can be downloaded at [www.planningportal.gov.uk](http://www.planningportal.gov.uk)

HMSO and Stationery Office documents are available from [www.tso.co.uk](http://www.tso.co.uk)

UK legislation is available at [www.legislation.gov.uk](http://www.legislation.gov.uk)

For general enquiries about statutorily protected listed buildings, scheduled monuments and registered parks and gardens in England contact [customers@english-heritage.org.uk](mailto:customers@english-heritage.org.uk)

# Where to go for further help

## General reading

- Barker, Peter and Fraser, June, 2000. *Sign Design Guide – A Guide to Inclusive Signage*. London: JMU Access Partnership and Sign Design Society
- Brereton, Christopher, 1995. *The Repair of Historic Buildings: Advice on Principles and Methods*. London: English Heritage
- Cave, Adrian, 2007. *Making Existing Buildings Accessible: Museums and Art Galleries*. London: RIBA
- English Heritage, 2000. *Streets for All: A Guide to the Management of London's Streets*. London: English Heritage
- English Heritage, 2005. *Streets for All* (set of eight regional manuals). London: English Heritage
- English Heritage, 2007. *Conservation Principles: Policies and Guidance for the Sustainable Management of the Historic Environment*. London: English Heritage
- English Heritage, 2013. *Practical Building Conservation: Conservation Basics*. London: English Heritage
- Penton, John, 2008. *Widening the Eye of the Needle: Access to Church Buildings for People with Disabilities* (3rd rev edn). London: Church House Publishing
- Sawyer, Ann and Bright, Keith, 2008. *The Access Manual: Auditing and Managing Inclusive Built Environments* (2nd edn). Oxford: Blackwell

## Access organisations

Action on Hearing Loss (formerly RNID)  
[www.actiononhearingloss.org.uk](http://www.actiononhearingloss.org.uk)  
 020 7296 8000

Centre for Accessible Environments  
[www.cae.org.uk](http://www.cae.org.uk)  
 020 7822 8232

National Register of Access Consultants  
[www.nrac.org.uk](http://www.nrac.org.uk)  
 020 7822 8232

Royal National Institute of Blind People  
[www.rnib.org.uk](http://www.rnib.org.uk)  
 0303 123 9999

## National amenity societies

Ancient Monuments Society  
[www.ancientmonumentsociety.org.uk](http://www.ancientmonumentsociety.org.uk)  
 020 7236 3934

Council for British Archaeology  
[www.archaeologyuk.org](http://www.archaeologyuk.org)  
 01904 671 417

The Garden History Society  
[www.gardenhistorysociety.org](http://www.gardenhistorysociety.org)  
 020 7608 2409

The Georgian Group  
[www.georgiangroup.org.uk](http://www.georgiangroup.org.uk)  
 020 7529 8920

Society for the Protection of Ancient Buildings  
[www.spab.org.uk](http://www.spab.org.uk)  
 020 7377 1644

The Twentieth Century Society  
[www.c20society.org.uk](http://www.c20society.org.uk)  
 020 7250 3857

The Victorian Society  
[www.victoriansociety.org.uk](http://www.victoriansociety.org.uk)  
 020 8994 1019

## Church bodies

Baptist Union of Great Britain  
[www.baptist.org.uk](http://www.baptist.org.uk)  
 01235 517700

Catholic Church in England and Wales  
[www.cbcew.org.uk/care-of-churches](http://www.cbcew.org.uk/care-of-churches)  
 020 7630 8220

Church Care  
[www.churchcare.co.uk](http://www.churchcare.co.uk) (general)  
[www.churchcare.co.uk/images/access\\_and\\_disabled\\_people.pdf](http://www.churchcare.co.uk/images/access_and_disabled_people.pdf) (access guidance)  
 0207 898 1000 (churches)  
 020 7898 1888 (cathedrals)

Jewish Heritage UK  
[www.jewish-heritage-uk.org](http://www.jewish-heritage-uk.org)  
 161 238 8621

The Methodist Church  
[www.methodist.org.uk](http://www.methodist.org.uk)  
 020 7486 5502 (helpdesk)  
 0161 235 6739 (conservation officer)

Religious Society of Friends (Quakers)  
[www.quaker.org.uk/property-matters](http://www.quaker.org.uk/property-matters)  
 020 7633 1000

General Assembly of Unitarian and Free Christian Churches  
[www.unitarian.org.uk](http://www.unitarian.org.uk)  
 020 7240 2384

The United Reformed Church  
[www.urc.org.uk](http://www.urc.org.uk)  
 020 7916 2020

## Other bodies

Association of Local Government  
Archaeological Officers UK  
**[www.algao.org.uk](http://www.algao.org.uk)**  
01975 564071

Cadw (Heritage in Wales)  
**[www.cadw.wales.gov.uk](http://www.cadw.wales.gov.uk)**  
01443 336000

Department for Communities and Local  
Government  
**[www.communities.gov.uk](http://www.communities.gov.uk)**  
0303 444 0000

Department of the Environment  
(Northern Ireland)  
**[www.doeni.gov.uk/niea/built-home](http://www.doeni.gov.uk/niea/built-home)**  
028 9054 0540

Department for Environment, Food &  
Rural Affairs (DEFRA)  
**[www.defra.gov.uk](http://www.defra.gov.uk)**  
08459 335577

English Heritage  
**[www.english-heritage.org.uk](http://www.english-heritage.org.uk)**  
0870 333 1181 (Customer Services)

Heritage Lottery Fund  
**[www.hlf.org.uk](http://www.hlf.org.uk)**  
020 7591 6000

Historic Scotland  
**[www.historic-scotland.gov.uk](http://www.historic-scotland.gov.uk)**  
0131 668 8600

Institute of Historic Building Conservation  
**[www.ihbc.org.uk](http://www.ihbc.org.uk)**  
01747 873133

National Trust  
**[www.nationaltrust.org.uk](http://www.nationaltrust.org.uk)**  
01793 817400

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English Heritage is the Government's statutory adviser on the historic environment.

**[www.english-heritage.org.uk](http://www.english-heritage.org.uk)**





## Information Provided by English Heritage on 'Establishing an Access Strategy'

Any organisation, be it a high street retailer, a museum or a restaurant, that is required to make reasonable adjustments under the Equality Act 2010 needs first to establish an 'Access Strategy'. This requires a strategic commitment at a high level in the organisation to making the service more inclusive either through design or management measures, or more often a combination of the two.

A timescale and budget need to be considered, and someone should assume responsibility for overseeing, evaluating and reviewing the implementation of any measures that are subsequently identified in the access planning process which needs to be well documented and transparent.

To help identify what in practice is likely to be 'reasonable'. the Code of Practice: *Services, Public Functions and Associations* (2011) produced by the Equality and Human Rights Commission states:

*"What is a reasonable step for a particular service provider to have to take depends on all the circumstances of the case. It will vary according to:*

- *the type of service being provided*
- *the nature of the service provider and its size and resources*
- *the effect of the disability on the individual disabled person"*

It is important that organisations and professionals do not undertake works involving access improvements without a good understanding of the needs of people with disabilities and the options available to meet those needs.

### The Access Planning Process

Preparing an Access Plan, and working through the issues it raises is fundamental to the process of determining the need for changes to a historic building. The process should consider the options available (including the provision of the service by other means) the priorities for implementation and the likely impact of each proposal on the building's significance. In reconciling access and conservation, the access plan can seek to embody best practice in access design and building conservation.

The first step in planning access improvements is to undertake an 'Access Audit'. This will assess and document the barriers to access which exist within a building and its surroundings.

The complementary part of the process will be to review or prepare a 'Conservation Assessment' that will establish the relative significance of a building or site in terms of its special architectural, historic or archaeological interest. Local authority conservation staff can provide advice on compiling these, as can your English Heritage regional office.

An access plan:

- Should consider the requirements of wheelchair users and those with restricted mobility, sensory impairments, and learning difficulties
- Should take into account the needs of families with young children
- Needs to take account of intellectual access which is as important as physical access for some disabled people
- Should be central to any organisation's strategic commitment to improving access
- Needs to be reviewed regularly so that the current provisions can be kept up to date and take account of changes in regulations and in available solutions
- Proposals should be tested before they are incorporated into the access plan by focus groups made up of people with disabilities or drawn from a local access groups
- The plan can also inform any access statement required under *Approved Document Part M* of the Building Regulations.

English Heritage believes that dignified access should be provided wherever practicable and celebrated with high-quality design that is also sensitive to the special interest of historic buildings.

Local authorities who own or manage historic buildings are encouraged to adopt access plans that are consistent with the special architectural, historic or archaeological interest of the property or landscape concerned.

## **Accessing York's Heritage & Cultural Offer**

### **York Minster**

The majority of the Minster is accessible with ramps in places. However until 2016 the building is undergoing a period of transformation, so those requiring step free access are recommended to check beforehand for accessibility on the day of a proposed visit.

#### On Arrival:

- Designated Disabled car parking (Very limited space by Chapter House, phone ahead)
- Hard surfaced car park
- Level/ramped wheelchair access to entrance (Ramped access to West Door at present.)
- Level/ramped wheelchair access into venue (Level)
- Concessionary fee for wheelchair user (No charge for wheelchair user)
- Concessionary fee for carer (Carer's pay to enter Minster only as the Tower is not accessible)
- Easy access around ground floor/area of site
- Wheelchair access to gardens/grounds

#### Toilets:

- Wheelchair accessible toilet/toilets
- Grab rails in toilet
- Easy access to wash basin and hand dryer/towels
- Wheelchair turning space in accessible toilet
- Space for right transfer to toilet
- Room for carer/carers in accessible toilet

#### Cafe/Shop:

- Level/ramped access to shop
- Level/ramped access to cafe/tearoom (No cafe/tearoom)
- Wheelchair accessible picnic area (None seen)

#### Other:

Assistance dogs are welcome, and wheelchairs are available for loan/hire. In certain areas a hearing loop can be made available, given advance notice. The Minster also offers special access to exhibits for the visually impaired, and guided tours can be provided.

### **Fairfax House**

Fairfax House covers two floors with access to the first floor being via a staircase. Due to the character of this Grade 1 listed building, disabled access is limited and only possible with assistance at a ground floor level.

Visitors are encouraged to telephone in advance of their visit with their requirements so that staff can endeavour to assist them.

There is a drop-off point for guests immediately outside the main entrance and a handrail for the steps up to the entrance.

Information can be made available in audio format, and there is an audible alarm system. There is also clear signage throughout the attraction e.g. colour contrast, large letters, pictograms.

### **Barley Hall**

Barley Hall is a reconstructed medieval townhouse and leads to some restrictions for those visitors with mobility and access difficulties.

Although there is access to the ground floor, the Great Hall features a raised threshold at the doorway. The first floor, on which the Parlour, Gallery, and Chambers are located, is accessed via a staircase, which some guests may find a little steep. Unfortunately, there is no lift to the first floor.

There is a second fairly steep staircase down to the buttery, pantry and classroom, although the classroom can be accessed externally. It is advisable that small children are looked after when using the staircases.

Visitors are encouraged to telephone in advance of their visit to discuss their access requirements. Vehicles cannot park close to the Hall. The easiest access is from Swinegate / Grape Lane where you can park before 11am and after 4pm from Monday to Friday, before 10.30am and after 4.30pm on Saturday, and before 12pm and after 4pm on Sunday.

Barley Hall has one male and one female toilet. Unfortunately, the Hall does not offer separate toilets for disabled guests or permanent baby changing facilities at this time

### **Castle Museum**

On Arrival:

- The venue does not have its own car park, but there is a car park for public use within approx 200m (Castle Car Park).
- The car park is located at the front of the venue.
- There is a ramp to access the main entrance.
- The reception desk is low height.

Inside Access - North Building:

- There is no level access to the building. There is a moderate ramp to the left within the entrance together with 9 clearly marked steps with a handrail

#### Inside Access - South Building:

- There is no level access to this building. There is a steep ramp to the right as you enter the building with a level landing at the top. There are also 15+ clearly marked steps with handrails on both sides.

The Museum exhibits cannot be audio described and there is no tactile signage or hearing assistance system. However, concessions and touch tours are available. There is also a wheelchair to borrow, which needs booking in advance

#### Toilets:

- There are accessible unisex toilets within both buildings but they are not for the sole use of disabled people. The toilets all have level access and there is pictorial signage on or near the entrances.
- The toilets in the south building have lateral transfer space with wall mounted grab rails on both sides.
- In the north building the transfer space is on the right and support rails are fitted.

#### Cafe/Shop:

Within the Restaurant Bar there is ample room for a wheelchair user to manoeuvre, and the menu is clearly written on the wall.

### **Yorkshire Museum**

The Yorkshire Museum is housed in a building on the old St. Marys Abbey site within the museum gardens.

#### On Arrival:

- Level/ramped wheelchair access to entrance (Ramped)
- Level/ramped wheelchair access into venue (Level)
- Concessionary fee for carer (Carer get's in free (but be sure to ask))
- Easy access around ground floor/area of site
- Wheelchair access to gardens/grounds (Botanical Gardens separate area to visit)
- Wheelchair access to other floors
- lift controls at accessible height

#### Toilets:

- Wheelchair accessible toilet/toilets
- Grab rails in toilet
- Easy access to wash basin
- easy access to hand dryer/towels
- Wheelchair turning space in accessible toilet

- Space for left transfer to toilet
- Room for carer/carers in accessible toilet

#### Cafe/Shop:

- Level/ramped access to shop
- Level/ramped access to cafe/tearoom (Tea/coffee machine available in shop)
- Accessible counter/cutlery if self service
- Sufficient wheelchair access to tables

#### Other:

Assistance dogs are welcome, and wheelchairs are available for loan/hire. A hearing loop is available in the theatre, and the Museum offers special access to exhibits for the visually impaired, and wheelchair access to interactive exhibits.

### **Art Gallery**

The gallery is currently closed for major redevelopment and will reopen in 2015 with 60% more gallery space, a new Centre for British Studio Ceramics and improved access arrangements. Prior to the ongoing renovation work, the Art Gallery had a stair lift to the upper gallery and an accessible toilet.

### **National Railway Museum**

The National Railway Museum in York is a large site which is mainly on one level. In the few areas where it is not, facilities have been put in place to enable all visitors, whatever their ability, to access the huge variety of interesting exhibits and memorabilia stretching back 300 years.

The Great Hall and other exhibition rooms have many huge and ancient Railway engines in, some of which have been ramped to provide access up to the cab. There is also a small road train that runs every half an hour from the Museum into York Centre which is fully accessible at the rear.

#### On Arrival:

- Designated Disabled car parking (hard surfaced car park)
- Concessionary fee for wheelchair user (Free entrance to all)
- Level wheelchair access to entrance into venue
- Wheelchair access to gardens/grounds
- Wheelchair access to other floors via lift with controls at accessible height

#### Toilets:

- Wheelchair accessible toilet/toilets
- Grab rails in toilet and easy access to wash basin and hand dryer/towels



- Wheelchair turning space in accessible toilet
- Space for left transfer to toilet (near entrance)
- Space for right transfer to toilet (upstairs in 'works')
- Room for carer/carers in accessible toilet

#### Cafe/Shop:

- Level/ramped access to shop and cafe/tearoom
- Accessible counter/cutlery for self service
- Sufficient wheelchair access to tables
- Wheelchair accessible picnic area

#### Other:

Assistance dogs are welcome. Wheelchairs are available for loan/hire, and wheelchairs have access to the land train via the rear carriage. There is also special access to exhibits for the visually impaired.

### **York Dungeon**

The York Dungeon welcomes guests with disabilities, together with their helpers and carers. The majority of the facilities are designed to be fully accessible to disabled guests. However it is situated in a Grade 2 Listed building leading to some restrictions for guests with mobility scooters.

Navigating around the Dungeon is mainly via level pathways. However due to the nature of the attraction some floor surfaces are uneven. Access is also gained via low gradient slopes and specialised stair lifts (restrictions apply) to the various levels of the attraction. The York Dungeon tour lasts approximately 70 minutes, of which most you are required to stand.

For safety reasons they can only accommodate one manual wheelchair user at a time, so wheelchair users are advised to book in advance to prevent any delays in starting the tour. In case of an evacuation, there are two flights of stairs both with stair lifts (Max weight 120kg/ 18.8 stone) and guests must be able to transfer from wheelchair to stair lift unaided by Dungeon staff.

The York Dungeon is not considered suitable for those suffering from claustrophobia.

The York Dungeon experience is largely delivered by actors and voiceover audio, often in low light levels. Therefore guests with low vision or visual impairment and/or hearing difficulties may struggle to experience the attraction fully, and may have difficulty navigating around the facility. However a helper or carer is welcome to accompany a disabled visitor to assist, without charge.

Only one carer can receive free entry per disabled guest, and York Dungeon also requires documentary proof of disability i.e. blue/orange badge, DLA letter or doctor or physician letter. Disabled guests are encouraged to prebook online or via the contact centre to avoid general admission queue lines and to book a time slot allocation.

Where appropriate, York Dungeon's website also provides access information relevant to specific sections of the tour e.g. the Dick Turpin Drop Benches - The drop benches are to give the illusion of hanging and give a sudden movement; wheelchair users must be able to transfer un-aided into and out of the ride seats. The benches are not suitable for visitors with:

- Heart complaints or pacemakers
- Back or neck complaints
- Broken limbs or have had recent surgery
- Pregnant guests
- Have a condition that may result in injury or complication from quick movement

On Arrival:

Unfortunately the Dungeon does not have any designated parking. The nearest car parks to the York Dungeon are Castle and Piccadilly which both have disabled parking bays.

Toilets:

The York Dungeon has fully accessible toilets. Toilets are located after the third show inside the Dungeon i.e. after leaving Guy Fawkes, down the stairs before entering Ghosts. A disabled toilet is situated by the Lost Roman Legion Labyrinth.

Other:

Assistance dogs are welcome in the York Dungeon; however, due to health and safety regulations they are not permitted to ride on any rides with the guest. A member of the party must be with the dog at all times, and there are loud noises, mist effects and smells (good and nasty) that may be ?

### **Jorvik Viking Centre**

A tour of the main exhibition lasts approximately 14 minutes and takes you around a 'realistic' Viking village with all the smells and sights. Visitors travel round the main exhibition in a pod. Each pod has a hearing loop to listen to the commentary. A large print transcription of the ride commentary is available, as is a Braille guide for the Artefacts Alive gallery. Guide dogs are welcome in the centre, although the ride may make some dogs nervous.

Wheelchair users are advised to book in advance, as each pod can only accommodate one wheelchair at a time. A wheelchair is placed on a movable platform at the front of the pod, and headphones are provided for the wheelchair user to listen to the commentary. On arrival, a wheelchair user may also be asked a number of questions to ensure their maximum participation in the tour.

Once the tour is finished, wheelchair users can continue into the rest of the centre, where there are many other exhibits to see. However if they want to go into the shop, which all other visitors exit through, they need to exit the building and then re-enter through the main door on the street.

Some of the exhibits are in the basement which can be accessed via a lift - the area is quite dim although the floor is lit up underneath and this may disorientate some people. It is suggested that visitors who suffer from claustrophobia, speak to a member of staff about visiting downstairs, prior to paying.

#### On Arrival:

- Designated Disabled car parking in nearby Piccadilly Car Park (hard surfaced car park)
- Concessionary fee for wheelchair users, but pre-booking is necessary
- Level wheelchair access to entrance and easy access around the area of the site
- lift with controls at accessible height

#### Toilets:

- Wheelchair accessible toilet/toilets
- Grab rails and easy access to wash basin and hand dryer/towels
- Wheelchair turning space in accessible toilet
- Space for left transfer to toilet
- Room for carer/carers in accessible toilet

#### Cafe/Shop:

- Level/ramped access to shop (Ramped access)

#### Other:

Assistance dogs are welcome although some aspects of the ride may make them nervous. Wheelchairs are available for loan/hire, and the Centre offers special access to exhibits for the visually impaired.

### **Ghost Walk Tours**

These are offered via a few companies and many offer tours that are accessible for wheelchair users, some for a small concession fee.

### **York Wheel**

The Wheel is wheelchair accessible as long as patrons are accompanied by a travelling companion or a member of staff.

### **York River Boat Trips**

Wheelchairs users should be sure to book on 'The River Duchess', one of the many boats in the fleet owned by York Boat, as it is the only one with a disabled access toilet on board. The boat is wide and fully accessible with tables and chairs down the length of its inside bar area. For those who are able, there is seating outside up on top, but for those unable to make it up there, there is a small seating area to the front of the boat which provides outside space for a wheelchair user to enjoy the good weather.

Inside by the bar area is a toilet which has left hand transfer, through a bi-fold door, and although the space is on the tight side, with a little manoeuvring, access is possible.

#### On Arrival:

- Designated Disabled car parking in nearby public Car Parks at St George's Field & Castle (both hard surfaced car parks)
- Ramped access at King's Staith Landing
- Concessionary fee for wheelchair users and Carers
- Pre-booking is necessary for wheelchair users to ensure 'River Duchess' is available on the day of your choice
- Easy access around ground floor of boat

#### Toilets:

- Wheelchair accessible toilet/toilets
- Grab rails in toilet and easy access to wash basin and hand dryer/towels
- Room for carer/carers in accessible toilet
- Measures to improve the space to side transfer are scheduled

#### Cafe/Shop:

- Level access to bar serving drinks & snacks
- Accessible counter and sufficient wheelchair access to tables

#### Other:

Assistance dogs are welcome.

### **City Screen York**

The cinema suggests that advance booking is a good idea to enable staff to be ready to provide assistance if required. All areas of the building are accessible to customers with limited mobility, including wheelchair users. Wheelchair spaces or seats in any particular part of the auditorium can be reserved and accompanying carers are eligible for a free ticket.

The Box Office and bar all have adapted counters and accessible levels for transactions, and in the event of a fire, wheelchair users and other mobility-impaired patrons will be evacuated by trained staff using evacuation chairs placed at, or near, the top (or bottom if in the basement) of staircases.

For visually impaired customers, guide dogs are welcome, and an aisle seat can be reserved. Alternatively a guide dog can be cared for by a member of staff for the duration of the performance. Large print menus and film schedules are also available on request. All stair rails have embossed tactile aids underneath which indicate the number of steps approaching each level. Three bumps mean that you are on the third step from the landing, two that you are on the second step etc.

For customers with impaired hearing there are induction loop facilities at the Box Office and infrared facilities in all three screens. The Box Office can provide receiving equipment to use the infrared system. Customers are asked for a credit card or a £5.00 deposit for the equipment, which is fully refunded on its return at the end of the screening. Certain performances carry subtitles and these are clearly indicated on the weekly listings flyer and in the free weekly email newsletter.

There is a lift to the right as you enter the main foyer, which serves all floors and the basement areas. The lift is fitted with a voice commentary and tactile aids and it has a telephone to contact a member of staff in an emergency.

#### On Arrival:

- Setting down is best done by drawing alongside the cinema in Coney Street. This can be done Monday to Friday before 11.00am and after 4.00pm; Saturday before 10.30am – and after 4.30pm; and Sunday before 12.00noon and after 4.00pm.
- There are also parking spaces in St Helen's Square, Parliament Square and Davygate for orange-badge holders.

**Toilets:**

- The main customer toilets are in the basement, which include a separate fully accessible toilet.
- There is an additional toilet for people with disabilities on the top floor next to the entrance to the lift.
- An emergency call-point is provided in the disabled toilets should assistance be required.

**Reel Cinema**

The REEL Cinema website contains no information on the disabled access and facilities at each Reel Cinema. Instead it suggests that cinema goers contact their local REEL Cinema for details.

**National Centre for Early Music**

The National Centre for Early Music is completely flat-floored throughout making it an accessible building for wheelchair users with or without an accompanied helper. The National Centre for Early Music has a state-of-the-art induction hearing loop to ensure good quality of sound.

There are two designated disabled car parking spaces in the adjacent car park, an entrance ramp and disabled toilet facilities. The Centre also has a copy of a Braille map of York City Centre, produced by the Royal Institute for the Blind, which visitors are welcome to consult.

Their website is also made more accessible as it offers viewers the option to increase the size of the text, translate the site into other languages, and to have the site read aloud.

**The Barbican**

York Barbican's runs an Access Scheme which entitles patrons with disabilities to concessionary ticket prices. Where patrons with disabilities need a carer to assist and attend an event, the combined cost is equivalent to the full cost of one ticket. Patrons with disabilities are also asked to provide their access requirements so that where possible, they can be seated appropriately.

York Barbican has step-free access into the auditorium, meeting rooms, restaurants and bars, and the first floor is accessible via a lift. Wheelchair spaces are located on Balcony Level in the 'slips' and in Stalls on either row A or row AA, whichever is the front row.

Level access seating is located on Balcony row A and Stalls rows A, AA and BB (where rows AA and BB are present). Each row B and above on both Stalls and Balcony involves 2 shallow steps.



Priority Accessible Seats are available to book for those who require level access. These seats also have extra leg room and are suitable for those with assistance dogs or who normally require an aisle seat.

The Barbican offers a wheelchair loan service (subject to availability) to help patrons to and from their Priority Access seats, and can be requested when booking tickets. However this does not include staff assistance and anyone borrowing a wheelchair must be able to use it independently or have the assistance of a carer or companion.

There is a hearing enhancement system in the auditorium and the monthly diary is available in alternative formats (large print and audio). Hearing and assistance dogs are welcome throughout the building and auditorium, and dog mats are available on request. Aisle seats can also be requested.

On Arrival:

- Disabled parking spaces are available at nearby Q-Park Kent Street. A parking voucher for the car park can be bought in advance for the reduced York Barbican rate of £5.00, valid from 3.00pm on the day of the concert until 9.00am the following morning. There are 4 disabled parking bays for Blue Badge holders in Q-Park Kent Street which are available on a first come, first served basis on the day.
- The main entrance/Box Office entrance of York Barbican has level access from the piazza on Paragon Street. The ground floor foyer spaces are all level access. There is a lift to the upper level (Balcony) and the lift has voice announcements and raised lettering on the control panel.

Toilets:

- An accessible toilet is available on both floors of the Barbican

Cafe/Shop:

- All bars and the Box Office have low level counter positions.

### **Grand Opera House**

York Grand Opera House is a member of the Ambassador Theatre Group (ATG). Each of their 39 theatres has an Access Champion who is dedicated to ensuring that theatre goers with disabilities have a successful and enjoyable visit to the theatre.

They have developed Visual Stories for patrons on the autistic spectrum to improve their visit to the theatre. These Visual Stories are intended to help prepare any new visitors for the experience of visiting a theatre and to familiarise them with their surroundings.

Detailed information about each theatre's wheelchair spaces, accessible toilets, lift services and general accessibility is provided via each theatre's website in the 'Access' section.

Theatre goers are asked to explain their particular access requirements when booking tickets via the dedicated Access booking line and to specify if they are able to transfer or need a wheelchair space.

Patrons are recommended to arrive 30 minutes before a performance starts and to notify a member of staff if assistance is required. They recognise that many patrons are more comfortable transferring from their wheelchair to a theatre seat to watch a performance. They therefore ask that patrons let them know the type of chair that they will be transferring from to ensure the theatre is able to store it during the performance.

Each theatre also offers an 'At Seat Service' for any patrons with Access requirements. Front of House staff will take orders for drinks, ice cream, merchandise or kiosk items to be brought to the patron's seat, both before the performance and during the interval, and this free service can be requested on arrival.

Guide dogs are welcome in all ATG theatres and can be catered for. Patrons are asked to inform a member of staff about their dog at the time of booking to ensure that they are booked into the most appropriate and spacious seat.

Audio Described Performances – This is where a verbal commentary is given through infra-red headsets to assist patrons who are visually impaired. Headsets are collected on arrival at the theatre from a member of staff in the foyer. They explain how the headset works and set it to the correct channel.

A trained Audio Describer sits in a box at the back of the auditorium with a view of the stage and conducts the description live. An introduction is given prior to the show. During silent intervals in the show (e.g. when there is a scene change and no dialogue), verbal commentary describes the setting, costumes, characters, facial expressions, body language and action. The description does not interfere with the performance but fills in the gaps.

Captioned Performances -These are similar to television subtitles and give patrons who are deaf, deafened, or hard of hearing access to live performance. Captions can also be useful for those whose first language is not English. The actors' words appear on display units at the same time as they are spoken or sung. These display units are placed in the set, next to the

stage, or in the auditorium, and display speakers' names, sound effects and off-stage noises.

Most ATG theatres also have Sennheiser infra-red sound amplification systems installed, and offer two types of Hearing Enhancement Aids to support this system:

- Induction Loop Necklace – these are suitable for patrons already wearing a Hearing Enhancement Aid. Sound is amplified by putting the necklace around your neck, and switching hearing aids to the 'T' setting.
- Headsets – these amplify sound through earpieces similar to regular headphones. This is suitable for patrons without a Hearing Aid. Personal headphones can be worn if preferred.

Necklaces and headsets are collected from the theatre's cloakroom, which are normally situated in the theatre's main foyer. Theatre staff may request some form of deposit or identification when audio equipment is collected and this is returned on return of the equipment.

BSL interpreted / Signed performances – these are signed performances for the benefit of patrons who use sign language. Trained British Signed Language (BSL) signers usually stand to one side of the stage and interpret the script used by the performers at the same time as it is being performed.

Not all shows have Audio Described / Captioned / Signed performances - those that have are identified within brochures and online. The Access team is also aware when these performances are scheduled and are able to assist with booking requests, via the dedicated Access booking line, by email to the theatre's Access Champion, or in person at the Box Office. They can also advise on the best seats to book to ensure the best sight lines.

Each theatre's Access Champion can also provide additional resources, which might range from a synopsis of the show in CD format, a large print or Braille cast list, to an audio programme. Dependent on availability, these can be sent to patrons prior to the performance.

Upcoming Assisted Performances at York Grand Opera House:

- Captioned - Mon 22 Dec 2014 6:30pm Cinderella
- Audio-Described - Sat 20 Sep 2014 2:30pm York Stage Musicals present Sister Act
- Relaxed Performance - Mon 29 Dec 2014 2:00pm Cinderella

ATG also offer Touch Tours and Orientation Visits at all of their theatres. Touch Tours give patrons who are visually impaired the opportunity to go up on stage and touch parts of the set and any major pieces of scenery, props and costumes. This is to help audience members to immerse themselves in the imaginary world presented on stage. Not all shows have Touch Tours. But each theatre's Access Champion can advise on those that have and take Touch Tour bookings.

An orientation visit enable patrons to have a tour of the theatre prior to their visit, ask any questions, and learn a bit more about what they can expect from the theatre environment. They cover a typical patron's 'journey' from booking and collecting tickets to visiting the auditorium, the bars, chill out areas and accessible toilets. They are especially beneficial for patrons who use a wheelchair, for groups with additional requirements, for patrons on the autistic spectrum, or for those who are going to attend a Relaxed or assisted performance. They are usually organised on an ad hoc basis and can be arranged for individuals or groups depending on their needs. The majority of Orientation Visits will be arranged between 10am and 6pm on weekdays. It is possible to arrange visits at alternative times but if it's prior to a performance it means other audience members would be in the theatre at the time.

### **Theatre Royal**

The Theatre Royal considers providing 'Access for All' an essential part of what they do and their mission as a theatre. They welcome all theatre-goers and provide an extensive range of services, and concessions for patrons with disabilities.

There are 6 wheelchair spaces in the stalls in the Main House and 4 in The Studio. There is no wheelchair access to other levels but there is an accessible toilet. There is also a wheelchair lift to The Studio and Café Bar, and there is wheelchair access and a wheelchair lift in the De Grey Rooms.

The Main House has a radio-based hearing aid system , and The Studio is fitted with an infra-red hearing aid system. Patrons are asked to inform the Box Office if they require these services when booking tickets.

### **Audio Description, Signed and Captioned Performances**

Audio described, captioned and sign interpreted performances are available for most performances in the Main House with pre-show Touch Tours also available. These can all be booked in advance through the Box Office and they recommend that tickets for Audio Described performances are booked at least 24 hours in advance.

In addition, audio described and large print brochures are available, and guide dogs are welcome - the Theatre provides a 'dog sitting service' and water bowls.

Upcoming Assisted Performances at the Theatre Royal:

- Audio Described - Sat 7 Jun, 2:30pm & 7:30pm - Morecambe
- Audio Described - Sat 12 Jul, 2:30pm & 7:30pm - A Taste of Honey
- Audio Described - Thu 21 Aug, 2:30pm & 7:00pm & Sat 23 Aug, 2:30pm & 7:00pm - The Wind In The Willows
- Signed Performance - Sat 30 Aug, 2:30pm - The Wind In the Willows
- Captioned - Sat 23 Aug, 2.30pm - The Wind In the Willows

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## Our Promise To Visitors

The National Code of Practice for Visitor Attractions

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**For the purpose of the charter a visitor attraction is defined as:**

“A permanently established excursion destination, a primary purpose of which is to allow public access for entertainment, interest or education and can include places of worship; rather than being primarily a retail outlet or a venue for sporting, theatrical, or film performances. It must be open to the public, for published periods of the year, and should be capable of attracting day visitors or tourists, as well as local residents.”

**[www.visitengland.org](http://www.visitengland.org)**

## The owner and management undertake:

1. To provide in promotional materials, an accurate description of the amenities, facilities and services of the Attraction.
2. To indicate on all such promotional materials any requirements for pre-booking, and any significant restrictions on entry.
3. To welcome all visitors courteously and without discrimination in relation to gender, sexual orientation, disability, race, religion or belief. To respect the requirements of the Equality Act 2010 by making 'reasonable' adjustments to improve service for disabled people and make available an Access Statement describing the accessibility aspects of a visit to the Attraction.
4. To describe accurately and display clearly:
  - a) Any charges for entry including service charges and taxes where applicable and any additional charges for individual attractions or special exhibitions
  - b) Dates and hours of operation, both opening and closing.
5. To provide in promotional materials for visitor enquiries; a postal address, an e-mail address, a telephone number and a website address from which the detailed information specified in 1, 2, 3 and 4 can be obtained.
6. To hold a current public liability insurance policy or comparable Government indemnity, and to comply with all applicable planning, health, safety, fire and other statutory requirements and regulations.
7. To provide signage and orientation information as appropriate to the Attraction, to assist visitors in understanding and enjoying the Attraction.
8. To consider the needs of visitors for whom English is not their first language and as appropriate to the Attraction, to make arrangements that enable them to be adequately informed to enjoy their visit.
9. To manage the Attraction in such a way as to ensure visitor safety, comfort and service, by sustaining a high standard of maintenance, customer care, courtesy and cleanliness.
10. To ensure that all staff who meet visitors can provide information and guidance about the Attraction, and are readily distinguishable as staff, whether employees or volunteers.

11. To have regard to the need to manage and operate the Attraction in a sustainable way.
12. To provide, as appropriate to the nature, scale and location of the Attraction; coach, car, motor-cycle and bicycle parking, adequate toilets, and catering facilities. If any of these requirements cannot be made available on site, to provide information at appropriate points on where they can be found locally.
13. To deal promptly and courteously with all enquiries, requests, reservations, correspondence and comments from visitors and try to resolve any complaints on site at the time of the visit.
14. To provide a facility on site for comments to be recorded and to advise clearly the name and contact details (address, telephone and e-mail) of the person to whom comments by visitors should be addressed.
15. To display prominently the National Code of Practice Certificate.

Further explanation of the points of the National Code of Practice can be found on the VisitEngland website under Business Development.

All visitor attractions are encouraged to fully utilise the VAQAS business support tool. The Visitor Attraction Quality Assurance Scheme is managed by VisitEngland and provides an annual visit by an independent assessor followed by a detailed report. Information on how to join the VAQAS scheme can be found on the VisitEngland website under Business Development.

**Current participants of VAQAS need not apply for the National Code of Practice as VAQAS provides automatic sign up to the Code.**

## Withdrawal of Registered Status & Appeals Procedure

Where VisitEngland has reason to believe that a Registered Visitor Attraction may not be conforming to the requirements of the National Code of Practice, it will notify the proprietor, in writing, of the reason. A copy of the letter will also be sent to the appropriate tourism authority and industry sector association (where applicable).

If no satisfactory answer is received from the proprietor within 14 days, VisitEngland may, at its own discretion, elect to remove the Registered status of the attraction. In such cases, VisitEngland will notify the proprietor of its intention (again copying the tourism authority and industry sector association). The proprietor will have the right to appeal against the decision, provided the appeal is submitted to VisitEngland, in writing, within 14 days of receipt of such notification.

Consideration of an appeal will be subject to the payment of an Appeal Fee of £150, payable to VisitEngland. The purpose of the Appeal Fee is to defray the costs that might be incurred in visiting the attraction. The fee will be refunded in the event of the appeal being upheld.

Where an appeal is made, an Appeals Panel will be formed consisting of:

- A VisitEngland representative
- A representative of the relevant tourism authority
- Two representatives of visitor attractions within the same region, one of whom may be replaced by a representative of the relevant industry sector association.

The Appeals Panel will meet as soon as is practicable, but in any event, no longer than 28 days after the submission of the appeal.

The Apellant, or his/her representative will be invited to a meeting of the Panel.

After hearing the evidence, the Panel may, at its discretion, decide to visit the attraction before arriving at its decision. In such cases, the proprietor or his/her representative, will be invited to accompany the visit.

The recommendation of the Appeals Panel will be notified to VisitEngland and the Apellant in writing. VisitEngland's decision, based on the recommendation of the Appeals Panel, will be final.

During the period of the appeal, the attraction's eligibility to participate in national and local tourist board promotions will not be suspended.

Where the Registered status of an attraction has been withdrawn, it may re-apply to VisitEngland to be Registered again after one year. Applicants seeking to be re-Registered will be required to pay a fee of £150. Registered status will not be restored until the attraction has been inspected by VisitEngland and has been found to conform to the requirements of the National Code of Practice<sup>1</sup>.

## List of York Venues Currently on DisabledGo's Website

Annex G

Venue Name	Detailed Access Guide	Classifications
Hunter Gee Holroyd	0	Accountants
Ghost Hunt	0	Activities   Activities and Sports
York Boat	1	Activities   Activities and Sports   Places of Interest   Places of Interest
York Motor Sports Village	1	Activities   Activities and Sports   Racecourses and Tracks
David Lloyd	1	Activities   Activities and Sports   Sport & Leisure Centres   Sport &
Yearsley Swimming Pool	1	Activities   Activities and Sports   Swimming Pools
New Earswick Indoor Bowling Club	1	Activities   Bowling Centres   Conference Centres, Rooms & Halls
Web Adventure Park	1	Activities   Cafes   Cafes   Cafes   Cafes   Cafes   Activities and Sports
Wired High Ropes and little bugs	1	Activities   Cafes   Cafes   Cafes   Cafes   Cafes   Activities and Sports
Yorkshire Museum of Farming	1	Activities   Cafes   Cafes   Cafes   Cafes   Cafes   Conference Centres,
Energise	1	Activities   Conference Centres, Rooms & Halls   Conference Centres,
DIG	1	Activities   Conference Centres, Rooms & Halls   Conference Centres,
Yorkshire Museum & Gardens	1	Activities   Conference Centres, Rooms & Halls   Conference Centres,
Chinese Medical Centre	0	Acupuncture Practitioners   Herbalists
Nobles Amusements	0	Amusement Arcades
Bishopgate Antiques	0	Antique Dealers
French House	0	Antique Dealers   Collectors Items & Curios
Nicholas Associates	0	Architects
Art Shop	0	Art & Craft Shops
Braithwaite Gallery	0	Art & Craft Shops
Castle Galleries	0	Art & Craft Shops
Coppergate Gallery	0	Art & Craft Shops
Craftsmen In Wood	0	Art & Craft Shops
Dilemma Artworks	0	Art & Craft Shops
Image	0	Art & Craft Shops
Steve Richards Watercolours	0	Art & Craft Shops
York Fine Arts	0	Art & Craft Shops
Prices Candlemakers	0	Art & Craft Shops   Gift Shops
York Art & Framing	0	Art & Craft Shops   Picture Framers & Frame Makers
York Auction Centre	1	Auctioneers and Valuers
Boots	0	Baby Goods   Clothes Shop Children   Cosmetics and Toiletries   Chain

## List of York Venues Currently on DisabledGo's Website

Annex G

Mothercare World	0	Baby Goods   Clothes Shops Uniform   Clothes Shop Ladies   Chain
Kingston Pharmacy	0	Baby Goods   Cosmetics and Toiletries   Gift Shops   Pharmacies
Clifton Bakery	0	Bakers
Fields Fayre	0	Bakers
Thomas The Baker	0	Bakers
Thomas The Baker	0	Bakers
Thomas The Baker	0	Bakers
Via Vecchia	0	Bakers
Doorsteps by the Green	0	Bakers   Confectionary retailers
Greggs	0	Bakers   Sandwich Shops
Cornish Pasty Bakery	0	Bakers   Take Away Food
Thomas The Baker	0	Bakers   Take Away Food
Alliance & Leicester	0	Banks & Building Societies
Barclays	0	Banks & Building Societies
Barclays	0	Banks & Building Societies
Barclays	0	Banks & Building Societies
Cheltenham & Gloucester	0	Banks & Building Societies
Cooperative Bank	0	Banks & Building Societies
Halifax	0	Banks & Building Societies
HSBC	0	Banks & Building Societies
HSBC	0	Banks & Building Societies
Leeds & Holbeck	0	Banks & Building Societies
Lloyds TSB	0	Banks & Building Societies
Lloyds TSB	0	Banks & Building Societies
Lloyds TSB	0	Banks & Building Societies
Nationwide Building Society	0	Banks & Building Societies
NatWest	0	Banks & Building Societies
NatWest	0	Banks & Building Societies
NatWest	0	Banks & Building Societies
Newcastle Building Society	0	Banks & Building Societies
Santander	0	Banks & Building Societies
Skipton Building Society	0	Banks & Building Societies
Yorkshire Bank	0	Banks & Building Societies
Bradford & Bingley	0	Banks & Building Societies   Financial Advisor   Mortgage Brokers



## List of York Venues Currently on DisabledGo's Website

Annex G

Deborah Lunness Clinic	0	Beauty Salons & Consultants
S.O.T.A Body & Beauty	0	Beauty Salons & Consultants   Ladies Hairdressers
Lawton Henry of York	0	Beauty Salons & Consultants   Nailcare
Nail Bar One	0	Beauty Salons & Consultants   Nailcare
Bedstead Company	0	Bed Retailers
Divan Centre	0	Bed Retailers
Futon Company	0	Bed Retailers   Furniture Retailers
Hambleton Furniture	0	Bed Retailers   Furniture Retailers
Clifton Bingo Hall	1	Bingo Clubs
Mecca Bingo	1	Bingo Clubs
Done	0	Bookmakers
Ladbrokes	0	Bookmakers
Tote Sport	0	Bookmakers
William Hill	0	Bookmakers
Barbican Bookshop	0	Books & Comics
Bookends	0	Books & Comics
Booksellers	0	Books & Comics
Chapter House Bookshop	0	Books & Comics
Christian Science Reading Room	0	Books & Comics
Fossgate Books	0	Books & Comics
Little Apple Bookshop	0	Books & Comics
Waterstones	0	Books & Comics
Matalan	0	Books & Comics   Clothes Shops Uniform   Clothes Shop Children
Oxfam Books	0	Books & Comics   Greeting Cards   Charity Shops
WH Smith	0	Books & Comics   Stationers   Confectionary retailers   Gift Shops
WH Smith	0	Books & Comics   Stationers   Greeting Cards   Computer Games
Tenpin	1	Bowling Centres
Bridal Rogue Gallery	0	Bridal Wear
Marks & Spencer	1	Bureau de Change   Clothes Shop Menswear   Clothes Shop Ladies
Walmgate Bar Post Office	0	Bureau de Change   Convenience Stores (Food and Drink)
Post Office Acomb	0	Bureau de Change   Post Offices
Wheldrake Post Office	0	Bureau de Change   Post Offices
York Post Office	1	Bureau de Change   Post Offices
D.W. Wilson	0	Butchers

List of York Venues Currently on DisabledGo's Website

Haxby Butchers	0	Butchers								
Stephen Bailey	0	Butchers								
Dusk	1	Cafe Bars								
Kafeneion	1	Cafe Bars								
Caffe Nero	1	Cafes								
Costa Coffee	1	Cafes								
Belle's Bouffe	1	Cafes   Cafe Bars								
Caffe Nero	0	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	
Caffe Nero	1	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	
Costa Coffee	1	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	
Jorvik Cafe	1	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	
National Trust Tea Rooms	1	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	
Pret A Manger	0	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	
Starbucks	1	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	
Starbucks	1	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	
Starbucks Coffee	0	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	
Starbucks Coffee	1	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	
Dean's Garden Centre	1	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Gardening Shops
Spurriergate Centre	1	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Gift Shops
Balloon Tree	1	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Greengrocers &
Farmers Cart	1	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Greengrocers &
Rowntree Park Reading Cafe	1	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Libraries
York Explore Library	1	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Libraries
Roko Health Club	1	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Sport & Leisure
Sainsbury's	1	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Supermarkets
Tesco Extra	1	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Supermarkets
Coffee Republic	0	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Take Away Food
Nescafe Refresh	0	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Take Away Food
Scoop's	0	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Take Away Food
Starbucks Coffee	1	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Tea & Coffee
Costa Coffee	1	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Tea & Coffee
The Gyrocopter Experience	1	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Places of Interest
Rowntree Park	1	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Places of Interest
Marks & Spencer	1	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Cafes	Clothes Shop Children   Clothes

## List of York Venues Currently on DisabledGo's Website

Annex G

BHS	1	Cafes	Cafes	Cafes	Cafes	Cafes	Clothes Shops Uniform	
Huntington Community Centre	1	Cafes	Cafes	Cafes	Cafes	Cafes	Community Halls	Conference
St Oswald's Parish Church Hall	1	Cafes	Cafes	Cafes	Cafes	Cafes	Community Halls	Conference
Express-O	0	Cafes	Cafes	Cafes	Cafes	Cafes	Confectionary retailers	Cafes
Bettys Cafe Tea Rooms	1	Cafes	Cafes	Cafes	Cafes	Cafes	Conference Centres, Rooms &	
Gateway Centre	1	Cafes	Cafes	Cafes	Cafes	Cafes	Conference Centres, Rooms &	
Cafe No. 8 Bistro	1	Cafes	Cafes	Cafes	Cafes	Cafes	Restaurants	Restaurants
Spurriergate Centre	0	Cafes	Cafes	Cafes	Cafes	Cafes	Restaurants	Restaurants
Cafe Concerto	1	Cafes	Cafes	Cafes	Cafes	Cafes	Restaurants	Restaurants
Wackers Restaurant	1	Cafes	Cafes	Cafes	Cafes	Cafes	Restaurants	Restaurants
El Piano	1	Cafes	Cafes	Cafes	Cafes	Cafes	Restaurants	Restaurants
Millers Yard Centre for Living	1	Cafes	Cafes	Cafes	Cafes	Cafes	Therapy Centres/Services	
Fenwick	1	Cafes	Department Stores					
Willow House Caravan Park	1	Camp Sites, Caravan & Holiday Parks						
Motorists Mecca	0	Car Electrics						
Buckley for Florin	0	Carpet & Rug Retailers						
Rugs of the World Ltd.	0	Carpet & Rug Retailers						
York Carpet & Bed Centre	0	Carpet & Rug Retailers		Bed Retailers		Flooring Planners & Fitters		
Rodgers of York	0	Carpet & Rug Retailers		Bed Retailers		Furniture Retailers   Soft		
Carpet Right	0	Carpet & Rug Retailers		Flooring Planners & Fitters				
Pocklington Carpets	0	Carpet & Rug Retailers		Flooring Planners & Fitters				
Argos Extra	0	Catalogue Shops						
York Cemetery	1	Cemeteries & Crematoria						
York Crematorium	1	Cemeteries & Crematoria						
York Council Voluntary Service	1	Charity and Voluntary Centres			Creche		Information Services	
Age Concern York	0	Charity Shops						
British Heart Foundation	0	Charity Shops						
British Heart Foundation	0	Charity Shops						
British Red Cross	0	Charity Shops						
Cats Protection	0	Charity Shops						
Help The Aged	0	Charity Shops						
Help The Aged	0	Charity Shops						
Oxfam	0	Charity Shops						
P.D.S.A	0	Charity Shops						

## List of York Venues Currently on DisabledGo's Website

Annex G

Saint Leonards Hospice Shop	0	Charity Shops
Salvation Army	0	Charity Shops
Shelter Shop	0	Charity Shops
Woodlands Respite Care Centre	0	Charity Shops
York Against Cancer	0	Charity Shops
Avenues Children's Centre	1	Children's Centres
Carr Children's Centre	1	Children's Centres
Clifton Children's Centre	1	Children's Centres
Haxby Road Children's Centre	1	Children's Centres
Hob Moor Children's Centre	1	Children's Centres
Knavesmire Children's Centre	1	Children's Centres
New Earswick Children's Centre	1	Children's Centres
St Lawrence's Children's Centre	1	Children's Centres
Westfield Children's Centre	1	Children's Centres
Chiropodist	0	Chiropodists
Heworth Chiropody Clinic	0	Chiropodists
Leah	0	Chiropractors
City Screen	1	Cinemas   Cinemas   Cinemas
Reel Cinema	1	Cinemas   Cinemas   Cinemas
Vue Cinema	1	Cinemas   Cinemas   Cinemas
Citizens Advice Bureau	1	Citizens Advice Bureau
Bell Farm Social Hall	1	Citizens Advice Bureau   Community Halls
York Hire Wear	0	Clothes Hire Menswear
Ice Blue	0	Clothes Shop Children
Petit Bateau	0	Clothes Shop Children
Vecopri	0	Clothes Shop Children
Little Mill	0	Clothes Shop Children   Clothes Shop Ladies
New Look	0	Clothes Shop Children   Clothes Shop Ladies   Lingerie   Hat &
New Look	0	Clothes Shop Children   Clothes Shop Ladies   Lingerie   Shoe Shops
Linfoot Dancewear	0	Clothes Shop Children   Clothes Shop Ladies   Shoe Shops
Army & Navy Stores	0	Clothes Shop Children   Clothes Shop Menswear   Clothes Shop Ladies
Burberry	0	Clothes Shop Children   Clothes Shop Menswear   Clothes Shop Ladies
Edinburgh Woollen Mill	0	Clothes Shop Children   Clothes Shop Menswear   Clothes Shop Ladies
Gap	0	Clothes Shop Children   Clothes Shop Menswear   Clothes Shop Ladies

## List of York Venues Currently on DisabledGo's Website

Annex G

Jumper Company	0	Clothes Shop Children	Clothes Shop Menswear	Clothes Shop Ladies
Peacocks	0	Clothes Shop Children	Clothes Shop Menswear	Clothes Shop Ladies
Ted Baker	0	Clothes Shop Children	Clothes Shop Menswear	Clothes Shop Ladies
Zara	0	Clothes Shop Children	Clothes Shop Menswear	Clothes Shop Ladies
Next	0	Clothes Shop Children	Clothes Shop Menswear	Clothes Shop Ladies
Sports Soccer	0	Clothes Shop Children	Clothes Shop Menswear	Clothes Shop Ladies
Boyes	0	Clothes Shop Children	Clothes Shop Menswear	Clothes Shop Ladies
Zik Zak	0	Clothes Shop Children	Clothes Shop Menswear	Clothes Shop Ladies
Monsoon Accessorize	0	Clothes Shop Children	Clothes Shop Menswear	Clothes Shop Ladies
Gap	0	Clothes Shop Children	Clothes Shop Menswear	Clothes Shop Ladies
BHS	0	Clothes Shop Children	Clothes Shop Menswear	Clothes Shop Ladies
River Island	0	Clothes Shop Children	Clothes Shop Menswear	Clothes Shop Ladies
Donnay	0	Clothes Shop Children	Clothes Shop Menswear	Clothes Shop Ladies
Sweat Shop	0	Clothes Shop Children	Clothes Shop Menswear	Clothes Shop Ladies
Autonomy	0	Clothes Shop Ladies		
Bon Marche	0	Clothes Shop Ladies		
C.M.D	0	Clothes Shop Ladies		
Chilli Pepper	0	Clothes Shop Ladies		
East	0	Clothes Shop Ladies		
Elle	0	Clothes Shop Ladies		
Fiorelli	0	Clothes Shop Ladies		
French Connection	0	Clothes Shop Ladies		
Jacques Vert	0	Clothes Shop Ladies		
Jesire E'sensual	0	Clothes Shop Ladies		
Klass	0	Clothes Shop Ladies		
Long Tall Sally	0	Clothes Shop Ladies		
Mergler	0	Clothes Shop Ladies		
Mexx	0	Clothes Shop Ladies		
Nitya	0	Clothes Shop Ladies		
Oasis	0	Clothes Shop Ladies		
Pilot	0	Clothes Shop Ladies		
Roman Originals	0	Clothes Shop Ladies		
Thimbelina of York Ltd.	0	Clothes Shop Ladies		
Van Mildert	0	Clothes Shop Ladies		

## List of York Venues Currently on DisabledGo's Website

Wallis	0	Clothes Shop Ladies
Windsmoor Group	0	Clothes Shop Ladies
York Body Piercing Clinic	0	Clothes Shop Ladies   Body Piercing & Tattoo Shops
Designer Room	0	Clothes Shop Ladies   Cosmetics and Toiletries   Luggage & Bag Shops
Laura Ashley	0	Clothes Shop Ladies   Furniture Retailers   Soft Furnishing Retailers
Oakley	0	Clothes Shop Ladies   Hat & Accessory Shops
New Look	0	Clothes Shop Ladies   Hat & Accessory Shops   Shoe Shops
Evans	0	Clothes Shop Ladies   Shoe Shops
Miss Selfridge	0	Clothes Shop Ladies   Shoe Shops
Laura Ashley	0	Clothes Shop Ladies   Soft Furnishing Retailers
Anderson Menswear	0	Clothes Shop Menswear
Austin Reed	0	Clothes Shop Menswear
Baron Jon	0	Clothes Shop Menswear
Ben Sherman	0	Clothes Shop Menswear
Clarskons The Shirt Shop	0	Clothes Shop Menswear
Greenwoods	0	Clothes Shop Menswear
Hackett	0	Clothes Shop Menswear
Haggar	0	Clothes Shop Menswear
Jon Barrie	0	Clothes Shop Menswear
Mannix Menswear	0	Clothes Shop Menswear
Moss	0	Clothes Shop Menswear
Petroleum	0	Clothes Shop Menswear
Pink	0	Clothes Shop Menswear
Pour Homme	0	Clothes Shop Menswear
Robert Smart Menswear	0	Clothes Shop Menswear
Smart Country	0	Clothes Shop Menswear
Suits You	0	Clothes Shop Menswear
Van Heusen	0	Clothes Shop Menswear
Wolsey	0	Clothes Shop Menswear
Amanda's	0	Clothes Shop Menswear   Clothes Shop Ladies
Armani Collection	0	Clothes Shop Menswear   Clothes Shop Ladies
Austin Reed	0	Clothes Shop Menswear   Clothes Shop Ladies
Cotton Traders	0	Clothes Shop Menswear   Clothes Shop Ladies
Fat Face	0	Clothes Shop Menswear   Clothes Shop Ladies



## List of York Venues Currently on DisabledGo's Website

Annex G

Guess	0	Clothes Shop Menswear	Clothes Shop Ladies
H & M	0	Clothes Shop Menswear	Clothes Shop Ladies
H.K.A	0	Clothes Shop Menswear	Clothes Shop Ladies
Hugo Boss	0	Clothes Shop Menswear	Clothes Shop Ladies
Jaeger	0	Clothes Shop Menswear	Clothes Shop Ladies
Joseph	0	Clothes Shop Menswear	Clothes Shop Ladies
Lakeland	0	Clothes Shop Menswear	Clothes Shop Ladies
Margaret Howell	0	Clothes Shop Menswear	Clothes Shop Ladies
Mountain Warehouse	0	Clothes Shop Menswear	Clothes Shop Ladies
Next	0	Clothes Shop Menswear	Clothes Shop Ladies
Paul Smith	0	Clothes Shop Menswear	Clothes Shop Ladies
Polo Ralph Lauren Factory Store	0	Clothes Shop Menswear	Clothes Shop Ladies
Primo Designer Clothing	0	Clothes Shop Menswear	Clothes Shop Ladies
River Island	0	Clothes Shop Menswear	Clothes Shop Ladies
Sand	0	Clothes Shop Menswear	Clothes Shop Ladies
Tog 24	0	Clothes Shop Menswear	Clothes Shop Ladies
Tommy Hilfiger	0	Clothes Shop Menswear	Clothes Shop Ladies
Viyella	0	Clothes Shop Menswear	Clothes Shop Ladies
Fairer World	0	Clothes Shop Menswear	Clothes Shop Ladies   Art & Craft Shops
Edinburgh Woollen Mill	0	Clothes Shop Menswear	Clothes Shop Ladies   Gift Shops
J D Sports	0	Clothes Shop Menswear	Clothes Shop Ladies   Hat & Accessory
Top Shop	0	Clothes Shop Menswear	Clothes Shop Ladies   Hat & Accessory
Calvin Klein Underwear	0	Clothes Shop Menswear	Clothes Shop Ladies   Lingerie
Jockey	0	Clothes Shop Menswear	Clothes Shop Ladies   Lingerie
Timberland	0	Clothes Shop Menswear	Clothes Shop Ladies   Shoe Shops
Topman/Topshop	0	Clothes Shop Menswear	Clothes Shop Ladies   Shoe Shops
Adidas	0	Clothes Shop Menswear	Clothes Shop Ladies   Sports Goods
Burton Stone Community Centre	1	Clubs and Associations	Community & Youth Groups   Community
Cameo Engraving	0	Collectors Items & Curios	
Collectables & Glasswear	0	Collectors Items & Curios	Gift Shops
68 Youth and Community Centre	1	Community & Youth Groups	Community Halls
Foxwood Community Centre	1	Community & Youth Groups	Community Halls
Orchard Park Community Centre	1	Community & Youth Groups	Community Halls
Haxby Memorial Hall	1	Community & Youth Groups	Community Halls   Conference Centres,

## List of York Venues Currently on DisabledGo's Website

Annex G

Strensall & Towthorpe Village Hall	1	Community & Youth Groups	Community Halls	Conference Centres,
Wigginton Recreation Hall	1	Community & Youth Groups	Community Halls	Conference Centres,
New Earswick Folk Hall	1	Community & Youth Groups	Community Halls	Daytime Centres
Askham Bryan Village Hall	1	Community Halls		
Askham Richard Church Hall	1	Community Halls		
Dunnington Reading Room	1	Community Halls		
Elvington Village Hall	1	Community Halls		
Heslington Village Meeting Room	1	Community Halls		
Heworth Community Centre	1	Community Halls		
Huntington Memorial Hall	1	Community Halls		
Naburn Village Hall	1	Community Halls		
Poppleton Community Centre	1	Community Halls		
Rufforth Village Hall	1	Community Halls		
Skelton Village Hall	1	Community Halls		
Wheldrake Village Hall	1	Community Halls		
Bishopthorpe Village Hall	1	Community Halls	Conference Centres, Rooms & Halls	Conference
Clements Hall	1	Community Halls	Conference Centres, Rooms & Halls	Conference
Holtby Village Hall	1	Community Halls	Conference Centres, Rooms & Halls	Conference
Holy Trinity Church Hall	1	Community Halls	Conference Centres, Rooms & Halls	Conference
Melbourne Centre	1	Community Halls	Conference Centres, Rooms & Halls	Conference
Oaken Grove Community Centre	1	Community Halls	Conference Centres, Rooms & Halls	Conference
Poppleton Road Memorial Hall	1	Community Halls	Conference Centres, Rooms & Halls	Conference
Rufforth Community Hall	1	Community Halls	Conference Centres, Rooms & Halls	Conference
Sanderson Court Community	1	Community Halls	Conference Centres, Rooms & Halls	Conference
Southlands Youth and Community	1	Community Halls	Conference Centres, Rooms & Halls	Conference
St Aelreds Community Centre	1	Community Halls	Conference Centres, Rooms & Halls	Conference
Sampson Community Centre Over	1	Community Halls	Conference Centres, Rooms & Halls	Conference
Clifton Moor Church and Professional Bodycare	1	Community Halls	Places of Worship	Places of Worship   Places of
Bose	0	Complementary Therapies		
Cartridge World	0	Computer retailers		
Cadbury's Factory Shop	0	Confectionary retailers		
Chocolate@26	0	Confectionary retailers		
Darlington Newsagents	0	Confectionary retailers		

List of York Venues Currently on DisabledGo's Website

Happy Shopper	0	Confectionary retailers	
Hartley's Newsagency	0	Confectionary retailers	
Imaginative Icing	0	Confectionary retailers	
John Bull Confectioner	0	Confectionary retailers	
Micklegate News	0	Confectionary retailers	
Mount News	0	Confectionary retailers	
Shipton Road Stores	0	Confectionary retailers	
Sweet Treasures	0	Confectionary retailers	
Thorntons	0	Confectionary retailers	
Thorntons	0	Confectionary retailers	
Late Shop	0	Confectionary retailers	Convenience Stores (Food and Drink)
Superdrug	0	Confectionary retailers	Cosmetics and Toiletries
Budgens	0	Confectionary retailers	Greengrocers & Fruit Sellers
Dillons	0	Confectionary retailers	Newsagent   Tobbaconists
Dunnington News	0	Confectionary retailers	Newsagent   Tobbaconists
Kiosk	0	Confectionary retailers	Newsagent   Tobbaconists
Maynews	0	Confectionary retailers	Newsagent   Tobbaconists
Walmgate News	0	Confectionary retailers	Newsagent   Tobbaconists
Rufforth Village Shop	0	Confectionary retailers	Post Offices
Village	0	Confectionary retailers	Post Offices
Heslington Post Office	0	Confectionary retailers	Post Offices   Tobbaconists
Acomb Parish Church Hall	1	Conference Centres, Rooms & Halls	Conference Centres, Rooms &
Hospitium	1	Conference Centres, Rooms & Halls	Conference Centres, Rooms &
Merchant Taylor Hall	1	Conference Centres, Rooms & Halls	Conference Centres, Rooms &
Regan Centre	1	Conference Centres, Rooms & Halls	Conference Centres, Rooms &
York Council Voluntary Service	1	Conference Centres, Rooms & Halls	Conference Centres, Rooms &
Friends Meeting House	1	Conference Centres, Rooms & Halls	Conference Centres, Rooms &
Heworth Methodist Church Hall	1	Conference Centres, Rooms & Halls	Conference Centres, Rooms &
Grand Opera House	1	Conference Centres, Rooms & Halls	Conference Centres, Rooms &
York Theatre Royal	1	Conference Centres, Rooms & Halls	Conference Centres, Rooms &
York St Mary's	1	Conference Centres, Rooms & Halls	Conference Centres, Rooms &
Barley Hall	1	Conference Centres, Rooms & Halls	Conference Centres, Rooms &
National Railway Museum	1	Conference Centres, Rooms & Halls	Conference Centres, Rooms &
Yorkshire Air Museum	1	Conference Centres, Rooms & Halls	Conference Centres, Rooms &

## List of York Venues Currently on DisabledGo's Website

Annex G

Bishopthorpe Palace	1	Conference Centres, Rooms & Halls	Conference Centres, Rooms &
St Williams College	1	Conference Centres, Rooms & Halls	Conference Centres, Rooms &
York Brewery	1	Conference Centres, Rooms & Halls	Conference Centres, Rooms &
York Maze	1	Conference Centres, Rooms & Halls	Conference Centres, Rooms &
Guildhall	1	Conference Centres, Rooms & Halls	Conference Centres, Rooms &
Mansion House	1	Conference Centres, Rooms & Halls	Places of Interest
Holy Redeemer Church	1	Conference Centres, Rooms & Halls	Places of Worship
York Environment Centre	1	Conservation Areas & Nature Reserves	
Costcutter	0	Convenience Stores (Food and Drink)	Convenience Stores (General
Costcutter	0	Convenience Stores (Food and Drink)	Convenience Stores (General
Costcutter	0	Convenience Stores (Food and Drink)	Convenience Stores (General
Costcutter	0	Convenience Stores (Food and Drink)	Convenience Stores (General
Elvington Village Store	0	Convenience Stores (Food and Drink)	Convenience Stores (General
Holgate Bridge News Food & Wine	0	Convenience Stores (Food and Drink)	Convenience Stores (General
Huntington Village Stores	0	Convenience Stores (Food and Drink)	Convenience Stores (General
Jacksons	0	Convenience Stores (Food and Drink)	Convenience Stores (General
Jacksons Of Sainsbury	0	Convenience Stores (Food and Drink)	Convenience Stores (General
One Stop	0	Convenience Stores (Food and Drink)	Convenience Stores (General
Shared Earth	0	Convenience Stores (Food and Drink)	Convenience Stores (General
Spar	0	Convenience Stores (Food and Drink)	Convenience Stores (General
Tesco	0	Convenience Stores (Food and Drink)	Convenience Stores (General
Tesco Express	0	Convenience Stores (Food and Drink)	Convenience Stores (General
Body Shop	0	Cosmetics and Toiletries	
Body Shop	0	Cosmetics and Toiletries	
Lush	0	Cosmetics and Toiletries	
Molton Brown	0	Cosmetics and Toiletries	
Savers	0	Cosmetics and Toiletries	
Wilkinson	1	Cosmetics and Toiletries	Chain Stores   Household Stores   Soft
Boots	1	Cosmetics and Toiletries	Chain Stores   Opticians-Dispensing
Woods of Windsor	0	Cosmetics and Toiletries	Gift Shops
Boots	0	Cosmetics and Toiletries	Pharmacies   Pharmacies   Pharmacies
Boots	0	Cosmetics and Toiletries	Pharmacies   Pharmacies   Pharmacies
Armed Forces Careers	0	Creche   Information Services	Information Services   Information
Future Prospects	0	Creche   Information Services	Information Services   Information

## List of York Venues Currently on DisabledGo's Website

Annex G

Training & Development Centre	1	Creche   Information Services   Information Services   Information
Scott Wilson Railways	0	Credit & Finance Companies
Cycle Heaven	0	Cycle Shops
Fulford Cycles	0	Cycle Shops
Age Concern Day Clubs	1	Daytime Centres
Age Concern Day Clubs	1	Daytime Centres
Age Concern Day Clubs	1	Daytime Centres
Age Concern Day Clubs	1	Daytime Centres
Henshelwoods Delicatessen	0	Delicatessens
Mair's Delicatessen	0	Delicatessens
Rafi's Spice Box	0	Delicatessens
A.S Haystead	0	Dental Surgeons   Dental Surgeons
Bayne & Fisher	0	Dental Surgeons   Dental Surgeons
Poppleton Dental Practice	1	Dental Surgeons   Dental Surgeons
Browns	1	Department Stores
Debenhams	1	Department Stores
Barnitts	0	Department Stores   Gardening Shops & Centres
Poundstretcher	0	Discount Stores
B&Q	0	DIY Stores
Wickes	0	DIY Stores
Clementhorpe Health Centre	1	Doctors Surgeries   Doctors Surgeries
East Parade Medical Practice	0	Doctors Surgeries   Doctors Surgeries
Fulford Surgery	1	Doctors Surgeries   Doctors Surgeries
Gale Farm Surgery	1	Doctors Surgeries   Doctors Surgeries
Gillygate Surgery	0	Doctors Surgeries   Doctors Surgeries
Haxby Group Practice Huntingdon	0	Doctors Surgeries   Doctors Surgeries
Heworth Surgery	1	Doctors Surgeries   Doctors Surgeries
Old Forge	1	Doctors Surgeries   Doctors Surgeries
Priory Medical Centre	1	Doctors Surgeries   Doctors Surgeries
Ebor Hearing Healthcare	0	Doctors Surgeries   Doctors Surgeries   Hearing Aids
Johnsons	0	Dry Cleaners
Johnsons	0	Dry Cleaners
Johnsons Dry Cleaners	0	Dry Cleaners
Meadowcrofts	0	Dry Cleaners

## List of York Venues Currently on DisabledGo's Website

Annex G

Askham Bryan College	1	Education	Education	Education
Burnholme Community College	1	Education	Education	Education
English Language Centre	0	Education	Education	Education
University of York - Biology	1	Education	Education	Education
University of York - Computer	0	Education	Education	Education
University of York - Computing	0	Education	Education	Education
University of York - Department of	1	Education	Education	Education
University of York - Derwent	1	Education	Education	Education
University of York - Disability	0	Education	Education	Education
University of York - Environment	0	Education	Education	Education
University of York - Goodricke	0	Education	Education	Education
University of York - Heslington	0	Education	Education	Education
University of York - Hull York	0	Education	Education	Education
University of York - Langwith	0	Education	Education	Education
University of York - Reception and	1	Education	Education	Education
University of York - Seebohm	0	Education	Education	Education
University of York - Student	0	Education	Education	Education
University of York - Vanbrugh	0	Education	Education	Education
York St. John University College	1	Education	Education	Education
National Centre for Early Music	1	Education	Education	Education   Theatres & Concert Halls
Blackwell & Denton	0	Electrical Appliance Retailers		
Euronics Centre	0	Electrical Appliance Retailers		
Remington	0	Electrical Appliance Retailers		
York Heating	0	Electrical Appliance Retailers	Fireplace Fitters	Gas Appliance
Sound Organisation	0	Electrical Appliance Retailers	Hi Fi Dealers	
Currys	0	Electrical Appliance Retailers	Hi Fi Dealers	Electrical Supplies
Herbert Todd and Sons	0	Electrical Appliance Retailers	Hi Fi Dealers	TV, Video, DVD & Radio
Adecco	0	Employment Agencies		
Ashton's Estate Agents	0	Estate Agents		
Churchill's	0	Estate Agents		
FPD Savills	0	Estate Agents		
Hudson Moody	0	Estate Agents		
Hunters	0	Estate Agents		
Hunters	0	Estate Agents		

## List of York Venues Currently on DisabledGo's Website

Annex G

Jackson - Stops and Staff	0	Estate Agents
Nigel Naish & Co.	0	Estate Agents
Quantum	0	Estate Agents
R M English	0	Estate Agents
Reeds Rains	0	Estate Agents
William H Brown	0	Estate Agents
William H Brown	0	Estate Agents
Your Move	0	Estate Agents
Northwood (York)	0	Estate Agents   Letting Agents
Curtain Up Ltd	0	Fabric Retailers
Micheal Carter Design & Interiors	0	Fabric Retailers   Soft Furnishing Retailers
Charles Wilkinson Financial	0	Financial Advisor   Insurance Companies
York FM	0	Financial Advisor   Insurance Companies
Anglers Corner Ltd.	0	Fishing Tackle Shop
Busy Lizzie	0	Florists
Fiona Hogg Floral Designs	0	Florists
Secret Garden	0	Florists
Wards the Florist	0	Florists
A. P. Love	0	Florists   Greengrocers & Fruit Sellers
Farm Foods	0	Freezer Centres
Jack Fulton	0	Freezer Centres
G.A. White	0	Furniture Retailers
MacDonalds	0	Furniture Retailers
Harveys	0	Furniture Retailers   Soft Furnishing Retailers
Twenty Two Interiors	0	Furniture Retailers   Soft Furnishing Retailers
Skelton Garden Centre	1	Gardening Shops & Centres
Gift Company	0	Gift Shops
Give the Dog a Bone	0	Gift Shops
Pandora	0	Gift Shops
Upper 10	0	Gift Shops
Mulberry Hall	0	Gift Shops   Household Stores
Robson & Cooper	0	Gift Shops   Luggage & Bag Shops
Disney Store	0	Gift Shops   Toy Shops
Woodcarvers of the Shambles	0	Gift Shops   Toy Shops



## List of York Venues Currently on DisabledGo's Website

Melodie Park Country Club and York Golf Range	1	Golf Clubs
American Golf	0	Golf Equipment   Sports Goods
Eco Depot	1	Government & Local Government Offices
Ashbank Children's Services	1	Government & Local Government Offices   Government & Local
Hollycroft Children's Services	1	Government & Local Government Offices   Government & Local
Markets Office	1	Government & Local Government Offices   Government & Local
West Offices Customer Centre	1	Government & Local Government Offices   Government & Local
York Housing Association Ltd	0	Government & Local Government Offices   Government & Local
York Police Headquarters	0	Government & Local Government Offices   Government & Local
York Register Office	1	Government & Local Government Offices   Government & Local
Fruitique	0	Greengrocers & Fruit Sellers
John Mannion High Class Fruit & Alligator Organic Wholefoods	0	Greengrocers & Fruit Sellers   Health Food Shops
Clinton Cards	0	Greeting Cards
Maynews Birthdays	0	Greeting Cards   Confectionary retailers   Newsagent   Tobbaconists
Clinton Cards	0	Greeting Cards   Gift Shops
Greetings	0	Greeting Cards   Gift Shops
Kardz	0	Greeting Cards   Gift Shops
Shine	0	Greeting Cards   Gift Shops
Gillygate Framing	0	Greeting Cards   Picture Framers & Frame Makers
Duttons for Buttons	0	Haberdashers
Keen Hands	0	Haberdashers
Viking Loom	0	Haberdashers
Bar Convent	1	Halls Of Residence   Cafes   Cafes   Cafes   Cafes   Cafes   Conference
Groves Hotel	1	Halls Of Residence   Conference Centres, Rooms & Halls   Conference
Churchill Hotel	1	Halls Of Residence   Conference Centres, Rooms & Halls   Conference
Holiday Inn York	1	Halls Of Residence   Conference Centres, Rooms & Halls   Conference
Hotel 53	1	Halls Of Residence   Conference Centres, Rooms & Halls   Conference
Hotel du Vin	1	Halls Of Residence   Conference Centres, Rooms & Halls   Conference
Marriott Hotel	1	Halls Of Residence   Conference Centres, Rooms & Halls   Conference
Middlethorpe Hall & Spa	1	Halls Of Residence   Conference Centres, Rooms & Halls   Conference
Parsonage Country House Hotel	1	Halls Of Residence   Conference Centres, Rooms & Halls   Conference

## List of York Venues Currently on DisabledGo's Website

Annex G

Travelodge	1	Halls Of Residence	Conference Centres, Rooms & Halls	Conference
York Central Travelodge	1	Halls Of Residence	Conference Centres, Rooms & Halls	Conference
York Fairfield Manor Hotel	1	Halls Of Residence	Conference Centres, Rooms & Halls	Conference
Ascot House	1	Halls Of Residence	Hotels, Guest Houses and B&Bs	
Carlton Hotel	1	Halls Of Residence	Hotels, Guest Houses and B&Bs	
Clifton Bridge Guest House	1	Halls Of Residence	Hotels, Guest Houses and B&Bs	
Dean Court Hotel (Best Western)	1	Halls Of Residence	Hotels, Guest Houses and B&Bs	
Express by Holiday Inn (York-East)	1	Halls Of Residence	Hotels, Guest Houses and B&Bs	
Hilton York	1	Halls Of Residence	Hotels, Guest Houses and B&Bs	
Ibis York Centre	1	Halls Of Residence	Hotels, Guest Houses and B&Bs	
Kilima Hotel (Best Western)	1	Halls Of Residence	Hotels, Guest Houses and B&Bs	
Lady Anne Middleton's Hotel	1	Halls Of Residence	Hotels, Guest Houses and B&Bs	
Marmadukes Hotel	1	Halls Of Residence	Hotels, Guest Houses and B&Bs	
Novotel	1	Halls Of Residence	Hotels, Guest Houses and B&Bs	
Pavilion Hotel	1	Halls Of Residence	Hotels, Guest Houses and B&Bs	
Queen Anne's Guest House	1	Halls Of Residence	Hotels, Guest Houses and B&Bs	
Queens Hotel	1	Halls Of Residence	Hotels, Guest Houses and B&Bs	
Royal York Hotel	1	Halls Of Residence	Hotels, Guest Houses and B&Bs	
Travelodge (Hull Road)	1	Halls Of Residence	Hotels, Guest Houses and B&Bs	
Warren	1	Halls Of Residence	Hotels, Guest Houses and B&Bs	
Wheatlands Lodge Hotel	1	Halls Of Residence	Hotels, Guest Houses and B&Bs	
Roman Bath	1	Halls Of Residence	Public houses & bars	Public houses & Bars
Black Swan	1	Halls Of Residence	Public houses & bars	Restaurants   Restaurants
Guy Fawkes Inn	1	Halls Of Residence	Public houses & bars	Restaurants   Restaurants
Jacobean Lodge	1	Halls Of Residence	Public houses & bars	Restaurants   Restaurants
Best Western Monkbar Hotel	1	Halls Of Residence	Restaurants   Restaurants   Restaurants	
Enida	0	Hardware Retailers		
Pextons Hardware	0	Hardware Retailers		
Bodum	0	Hardware Retailers	Household Stores	Kitchen Fitters
Claire's	0	Hat & Accessory Shops		
Claire's	0	Hat & Accessory Shops		
Coccinelle	0	Hat & Accessory Shops		
Hat Company	0	Hat & Accessory Shops		
Kangol	0	Hat & Accessory Shops		

## List of York Venues Currently on DisabledGo's Website

Annex G

Sunglasses Time	0	Hat & Accessory Shops
Food For Thought	0	Health Food Shops
Herbal Inn	1	Health Food Shops
Holland & Barrett	0	Health Food Shops
Julian Graves	0	Health Food Shops
Nut Shop & Health Foods	0	Health Food Shops
Tullivers	0	Herbalists
Anti Gravity	0	Hobbies & Pastimes
York Hospital	1	Hospitals & Clinics   Hospitals & Clinics   Hospitals & Clinics
Acer Guest House	1	Hotels, Guest Houses and B&Bs
Blue Bicycle	1	Hotels, Guest Houses and B&Bs   Restaurants
Bathstore.com	0	Household Stores
Habitat	0	Household Stores
Le Creuset	0	Household Stores
Supersave Ltd.	0	Household Stores
China China (U.K.) Limited	0	Household Stores   Soft Furnishing Retailers
Denby	0	Household Stores   Soft Furnishing Retailers
York Housing Association	1	Housing Association
Illingworths Ltd.	0	Insurance Companies
Swinton	0	Insurance Companies
Gateway Internet Cafe	1	Internet Cafes
Ashberry	0	Jewellers
Azendi	0	Jewellers
Barbara Cattle	0	Jewellers
Beaver Brooks	0	Jewellers
Bradleys Jewellers	0	Jewellers
Chappelle Jewellers	0	Jewellers
County House	0	Jewellers
Ernest Jones	0	Jewellers
Fosters Jewellers	0	Jewellers
Fraser Hart	0	Jewellers
Goldsmiths	0	Jewellers
H. Samuel	0	Jewellers
Harpers Jewellers	0	Jewellers

List of York Venues Currently on DisabledGo's Website

Hoppers of York	0	Jewellers
Lily Shambles	0	Jewellers
Palenque	0	Jewellers
R.A. Braithwaites	0	Jewellers
Silverado	0	Jewellers
Watch Factory	0	Jewellers
Watch Store	0	Jewellers
Gillygate Cobblers	0	Key Cutters   Shoe Repairs
Hair Fashion of Heworth	0	Ladies Hairdressers
Salon No. 6	0	Ladies Hairdressers
Cox of Yorkshire	0	Leather Goods
Belvoir Executive Letting	0	Letting Agents
Countrywide Residential Lettings	0	Letting Agents
Letters Ltd.	0	Letting Agents
Martin & Co	0	Letting Agents
Minster Property	0	Letting Agents
Sinclair Properties	0	Letting Agents
Acomb Explore Library	1	Libraries   Libraries   Libraries
Bishopthorpe Library	1	Libraries   Libraries   Libraries
Clifton Explore Library	1	Libraries   Libraries   Libraries
Copmanthorpe Library	1	Libraries   Libraries   Libraries
Dringhouses Library	1	Libraries   Libraries   Libraries
Dunnington Library	1	Libraries   Libraries   Libraries
Haxby Explore Library	1	Libraries   Libraries   Libraries
Huntington Library	1	Libraries   Libraries   Libraries
Mobile Library	1	Libraries   Libraries   Libraries
New Earswick Library	1	Libraries   Libraries   Libraries
Poppleton Library	1	Libraries   Libraries   Libraries
Strensall Library	1	Libraries   Libraries   Libraries
Tang Hall Explore Library	1	Libraries   Libraries   Libraries
JB Morrell Library	1	Libraries   Libraries   Libraries   Education   Education   Education
Ann Summers	0	Lingerie
La Senza	0	Lingerie
Lock-Fix Security	0	Locksmiths

List of York Venues Currently on DisabledGo's Website

Timpson	0	Locksmiths
Antler Factory Outlet	0	Luggage & Bag Shops
Travel Accessory Outlet	0	Luggage & Bag Shops
Brantano	0	Luggage & Bag Shops   Shoe Shops
Charles Clinkard	0	Luggage & Bag Shops   Shoe Shops
Goody 2 Shoes	0	Luggage & Bag Shops   Shoe Shops
Gentlemans Hairdressers	0	Men's Hairdressers & Barbers
Newtons Hairdressers	0	Men's Hairdressers & Barbers
Femmes Fatales	0	Men's Hairdressers & Barbers   Beauty Salons & Consultants   Ladies
75a Hair Design	0	Men's Hairdressers & Barbers   Ladies Hairdressers
Cut	0	Men's Hairdressers & Barbers   Ladies Hairdressers
Cutting Room	0	Men's Hairdressers & Barbers   Ladies Hairdressers
Dannie Lea Hair Design	0	Men's Hairdressers & Barbers   Ladies Hairdressers
Edward Charles Hair Design	0	Men's Hairdressers & Barbers   Ladies Hairdressers
Harry Nicholas	0	Men's Hairdressers & Barbers   Ladies Hairdressers
Heloise	0	Men's Hairdressers & Barbers   Ladies Hairdressers
June's Hairstyling	0	Men's Hairdressers & Barbers   Ladies Hairdressers
Lawton Henry of York	0	Men's Hairdressers & Barbers   Ladies Hairdressers
Lotus	0	Men's Hairdressers & Barbers   Ladies Hairdressers
Mamselle	0	Men's Hairdressers & Barbers   Ladies Hairdressers
Master Class Hair Design	0	Men's Hairdressers & Barbers   Ladies Hairdressers
Max Headroom	0	Men's Hairdressers & Barbers   Ladies Hairdressers
Nicole's Hair Salon	0	Men's Hairdressers & Barbers   Ladies Hairdressers
Part Two Hair Salon	0	Men's Hairdressers & Barbers   Ladies Hairdressers
Rootz	0	Men's Hairdressers & Barbers   Ladies Hairdressers
Toni & Guy	0	Men's Hairdressers & Barbers   Ladies Hairdressers
Vonnies	0	Men's Hairdressers & Barbers   Ladies Hairdressers
Forward Mobility	0	Mobility & Access Equipment   Mobility & Access Equipment (Travel &
Games Workshop	0	Model Shops   Hobbies & Pastimes
Miniature Scene	0	Model Shops   Hobbies & Pastimes
Models & Hobbies	0	Model Shops   Hobbies & Pastimes
Mortgage Advice Service	0	Mortgage Brokers   Creche   Information Services   Information
Quilt Museum and Gallery	1	Museums   Museums   Museums
Richard III Museum	1	Museums   Museums   Museums

List of York Venues Currently on DisabledGo's Website

York Castle Museum	1	Museums   Museums   Museums
Sheepish	0	Needlecraft
Maynews	0	Newsagent
Listers Newsagents	0	Newsagent   Convenience Stores (Food and Drink)   Convenience
Banyan	1	Nightclubs   Public houses & Bars   Restaurants
Gizmo	0	Novelty & Carnival Goods
Beer Ritz	0	Off Licences
Threshers	0	Off Licences
York Beer & Wine Shop	0	Off Licences
Binnington & Thurling Opticians	0	Opticians-Dispensing   Opticians-Dispensing   Opticians-Ophthalmic
Boots Opticians	0	Opticians-Dispensing   Opticians-Dispensing   Opticians-Ophthalmic
Coverdales Opticians	0	Opticians-Dispensing   Opticians-Dispensing   Opticians-Ophthalmic
Dolland & Aitchison	0	Opticians-Dispensing   Opticians-Dispensing   Opticians-Ophthalmic
Optical Express	0	Opticians-Dispensing   Opticians-Dispensing   Opticians-Ophthalmic
Specsavers	0	Opticians-Dispensing   Opticians-Dispensing   Opticians-Ophthalmic
Viewpoint	0	Opticians-Dispensing   Opticians-Dispensing   Opticians-Ophthalmic
Vision Express	0	Opticians-Dispensing   Opticians-Dispensing   Opticians-Ophthalmic
Vision Value	0	Opticians-Dispensing   Opticians-Dispensing   Opticians-Ophthalmic
Brogill Opticians	0	Opticians-Ophthalmic   Opticians-Ophthalmic   Opticians-Ophthalmic
Healthcall Optical Services	0	Opticians-Ophthalmic   Opticians-Ophthalmic   Opticians-Ophthalmic
Homsted Park	1	Parks & Gardens
Westbank Park	1	Parks & Gardens
Acomb Pets, Aquatics & Reptiles	0	Pet Shops
Pets At Home	0	Pet Shops
Bishopthorpe Road Pharmacy	0	Pharmacies   Pharmacies   Pharmacies   Pharmacies   Pharmacies
Hargrave Pharmacy	0	Pharmacies   Pharmacies   Pharmacies   Pharmacies   Pharmacies
Pharmacy M Hepworth	0	Pharmacies   Pharmacies   Pharmacies   Pharmacies   Pharmacies
Klick Photo Point	0	Photographers General
Past Images	0	Photographic Goods
Fairfax House	1	Places of Interest   Museums   Museums   Museums   Places of
Jorvik Viking Centre	1	Places of Interest   Museums   Museums   Museums   Places of
Micklegate Bar Museum	1	Places of Interest   Museums   Museums   Museums   Places of
York Army Museum	1	Places of Interest   Museums   Museums   Museums   Places of
Castle Howard	1	Places of Interest   Parks & Gardens   Places of Interest

## List of York Venues Currently on DisabledGo's Website

Annex G

Goddards House and Garden	1	Places of Interest	Parks & Gardens	Places of Interest
Clifford's Tower	1	Places of Interest	Places of Interest	
Dick Turpin's Grave	0	Places of Interest	Places of Interest	
Holy Trinity	1	Places of Interest	Places of Interest	
Merchant Adventurers Hall	1	Places of Interest	Places of Interest	
Treasurer's House and Gardens	1	Places of Interest	Places of Interest	
York Dungeons	1	Places of Interest	Places of Interest	
York Model Railway	0	Places of Interest	Places of Interest	
St Helen's Church	1	Places of Interest	Places of Worship	Places of Worship
St Martin le Grand Church	1	Places of Interest	Places of Worship	Places of Worship
St Michael Le Belfrey	1	Places of Interest	Places of Worship	Places of Worship
York Minster	1	Places of Interest	Places of Worship	Places of Worship
Summerrills Auctioneers	0	Places of Interest	Second Hand Dealers	Places of Interest
All Saints Church (Pavement)	0	Places of Worship	Places of Worship	Places of Worship
Church of All Saints (North Street)	0	Places of Worship	Places of Worship	Places of Worship
Clifton Methodist Church	1	Places of Worship	Places of Worship	Places of Worship
Dunnington Methodist Church	1	Places of Worship	Places of Worship	Places of Worship
Heslington Church	1	Places of Worship	Places of Worship	Places of Worship
Parish Church of St Olave	0	Places of Worship	Places of Worship	Places of Worship
Priory Church of the Holy Trinity	0	Places of Worship	Places of Worship	Places of Worship
Quaker Meeting House, Friargate	0	Places of Worship	Places of Worship	Places of Worship
Saint Helens, The Parish Of	0	Places of Worship	Places of Worship	Places of Worship
Saint Martin Le Grand	0	Places of Worship	Places of Worship	Places of Worship
Shrine of The Saint Margaret	0	Places of Worship	Places of Worship	Places of Worship
St Edward the Confessor	1	Places of Worship	Places of Worship	Places of Worship
St Oswald's Parish Church	1	Places of Worship	Places of Worship	Places of Worship
St Paul's Church	1	Places of Worship	Places of Worship	Places of Worship
St. Wilfrids Catholic Church	0	Places of Worship	Places of Worship	Places of Worship
North Yorkshire Police	1	Police Stations		
Heworth Post Office	0	Post Offices		
Huntington Post Office	1	Post Offices		
New Earswick Post Office	0	Post Offices		
Skelton Post Office	0	Post Offices		
Askham Bar Park & Ride	1	Public Car Parks	Park & Ride	Public Car Parks



## List of York Venues Currently on DisabledGo's Website

Annex G

Grimston Bar Park & Ride	1	Public Car Parks	Park & Ride	Public Car Parks	Public Transport	
Monks Cross Park & Ride	1	Public Car Parks	Park & Ride	Public Car Parks	Public Transport	
Naburn Park & Ride	0	Public Car Parks	Park & Ride	Public Car Parks	Public Transport	
Rawcliffe Bar Park & Ride	0	Public Car Parks	Park & Ride	Public Car Parks	Public Transport	
City of York Council Public Car	0	Public Car Parks	Public Car Parks	Public Car Parks		
Nunnery Lane Car Park	1	Public Car Parks	Public Car Parks	Public Car Parks		
Blue Boar	1	Public houses & Bars				
Duke of York	1	Public houses & Bars				
Fox and Roman	1	Public houses & Bars				
Golden Lion	1	Public houses & Bars				
Lamb & Lion Inn	1	Public houses & Bars				
Three Tuns	1	Public houses & Bars				
Blue Fly	1	Public houses & bars	Cafes	Cafes	Cafes	Cafes
Tiger 10	1	Public houses & bars	Cafes	Cafes	Cafes	Cafes
1331	1	Public houses & bars	Cafes	Cafes	Cafes	Cafes
Meltons Too	1	Public houses & bars	Cafes	Cafes	Cafes	Cafes
Cottage Inn	1	Public houses & bars	Conference Centres, Rooms & Halls			
Riverside Farm	1	Public houses & bars	Conference Centres, Rooms & Halls			
Bay Horse	1	Public houses & bars	Public houses & Bars	Public houses & Bars		
Beeswing Ale House	1	Public houses & bars	Public houses & Bars	Public houses & Bars		
Black Bull	1	Public houses & bars	Public houses & Bars	Public houses & Bars		
Blue Bell	1	Public houses & bars	Public houses & Bars	Public houses & Bars		
Bootham Tavern	1	Public houses & bars	Public houses & Bars	Public houses & Bars		
Bumper Castle	1	Public houses & bars	Public houses & Bars	Public houses & Bars		
Carlton Tavern	1	Public houses & bars	Public houses & Bars	Public houses & Bars		
Cross Keys	1	Public houses & bars	Public houses & Bars	Public houses & Bars		
Golden Fleece	1	Public houses & bars	Public houses & Bars	Public houses & Bars		
Graduate	1	Public houses & bars	Public houses & Bars	Public houses & Bars		
Grandstand Bar	0	Public houses & bars	Public houses & Bars	Public houses & Bars		
Harkers	1	Public houses & bars	Public houses & Bars	Public houses & Bars		
Knavesmire	1	Public houses & bars	Public houses & Bars	Public houses & Bars		
Last Drop Inn	1	Public houses & bars	Public houses & Bars	Public houses & Bars		
Lord Collingwood	1	Public houses & bars	Public houses & Bars	Public houses & Bars		
Marcia Grey	1	Public houses & bars	Public houses & Bars	Public houses & Bars		

## List of York Venues Currently on DisabledGo's Website

Mitre	1	Public houses & bars	Public houses & Bars	Public houses & Bars		
Quaker Wood	1	Public houses & bars	Public houses & Bars	Public houses & Bars		
Red Lion	1	Public houses & bars	Public houses & Bars	Public houses & Bars		
Revolution	1	Public houses & bars	Public houses & Bars	Public houses & Bars		
Revolution de Cuba	1	Public houses & bars	Public houses & Bars	Public houses & Bars		
Royal Oak	1	Public houses & bars	Public houses & Bars	Public houses & Bars		
Tang Hall Working Mens Club	1	Public houses & bars	Public houses & Bars	Public houses & Bars		
Three Legged Mare	1	Public houses & bars	Public houses & Bars	Public houses & Bars		
Windmill	1	Public houses & bars	Public houses & Bars	Public houses & Bars		
Woodman	1	Public houses & bars	Public houses & Bars	Public houses & Bars		
Ye Olde Starre Inn	1	Public houses & bars	Public houses & Bars	Public houses & Bars		
Yorkshire Terrier	1	Public houses & bars	Public houses & Bars	Public houses & Bars		
Missoula	1	Public houses & Bars	Restaurants			
Whippet Inn	1	Public houses & Bars	Restaurants			
Plunkets Restaurant	1	Public houses & bars	Restaurants	Restaurants	Restaurants	
Evil Eye Lounge	1	Public houses & bars	Restaurants	Restaurants	Restaurants	
31 Castlegate	1	Public houses & bars	Restaurants	Restaurants	Restaurants	
Bengal Brasserie	1	Public houses & bars	Restaurants	Restaurants	Restaurants	
Biltmore Bar & Grill	1	Public houses & bars	Restaurants	Restaurants	Restaurants	
Dormouse	1	Public houses & bars	Restaurants	Restaurants	Restaurants	
Flying Legends	1	Public houses & bars	Restaurants	Restaurants	Restaurants	
Hole in the Wall	1	Public houses & bars	Restaurants	Restaurants	Restaurants	
JD Wetherspoons - The Punch	1	Public houses & bars	Restaurants	Restaurants	Restaurants	
Kennedy's Bar and Restaurant	1	Public houses & bars	Restaurants	Restaurants	Restaurants	
Old White Swan	1	Public houses & bars	Restaurants	Restaurants	Restaurants	
Oscar's Wine & Bistro	1	Public houses & bars	Restaurants	Restaurants	Restaurants	
Pitcher & Piano	1	Public houses & bars	Restaurants	Restaurants	Restaurants	
Postern Gate	1	Public houses & bars	Restaurants	Restaurants	Restaurants	
Punch Bowl	1	Public houses & bars	Restaurants	Restaurants	Restaurants	
Slug and Lettuce	1	Public houses & bars	Restaurants	Restaurants	Restaurants	
Slug and Lettuce	1	Public houses & bars	Restaurants	Restaurants	Restaurants	
Toby Carvery	1	Public houses & bars	Restaurants	Restaurants	Restaurants	
Yates's	1	Public houses & bars	Restaurants	Restaurants	Restaurants	
Changing Space Walmgate	1	Public Toilets				

List of York Venues Currently on DisabledGo's Website

City of York Council Public Toilets	0	Public Toilets				
Public Toilets	0	Public Toilets				
Sliver Street Public Toilets	1	Public Toilets				
York Station	1	Public Transport   Train Stations   Train Stations   Train Stations				
Racecourse Betting Shop	0	Racecourses and Tracks				
York Racecourse	1	Racecourses and Tracks				
Carluccio's	1	Restaurants				
Cosmo	1	Restaurants				
McDonald's	1	Restaurants				
Mr Chippy	1	Restaurants				
Strada	1	Restaurants				
Yo Sushi	1	Restaurants				
Living Room	1	Restaurants	Restaurants	Restaurants	Restaurants	Conference
Ambiente	1	Restaurants	Restaurants	Restaurants	Restaurants	Restaurants
Ask	1	Restaurants	Restaurants	Restaurants	Restaurants	Restaurants
Ate O' Clock	1	Restaurants	Restaurants	Restaurants	Restaurants	Restaurants
Caesars Pizzeria & Ristorante	1	Restaurants	Restaurants	Restaurants	Restaurants	Restaurants
Cafe Rouge	1	Restaurants	Restaurants	Restaurants	Restaurants	Restaurants
Chiquito	1	Restaurants	Restaurants	Restaurants	Restaurants	Restaurants
Frankie & Benny's	1	Restaurants	Restaurants	Restaurants	Restaurants	Restaurants
Frankie & Benny's	1	Restaurants	Restaurants	Restaurants	Restaurants	Restaurants
Frankie C's	1	Restaurants	Restaurants	Restaurants	Restaurants	Restaurants
Gert & Henry's	1	Restaurants	Restaurants	Restaurants	Restaurants	Restaurants
Gourmet Burger Kitchen	1	Restaurants	Restaurants	Restaurants	Restaurants	Restaurants
Jamie's Italian	1	Restaurants	Restaurants	Restaurants	Restaurants	Restaurants
Kapadokya	1	Restaurants	Restaurants	Restaurants	Restaurants	Restaurants
La Tasca	1	Restaurants	Restaurants	Restaurants	Restaurants	Restaurants
La Vecchia Scuola	1	Restaurants	Restaurants	Restaurants	Restaurants	Restaurants
Lime House	1	Restaurants	Restaurants	Restaurants	Restaurants	Restaurants
Loch Fyne Restaurant	1	Restaurants	Restaurants	Restaurants	Restaurants	Restaurants
Mason's Bar Bistro	1	Restaurants	Restaurants	Restaurants	Restaurants	Restaurants
McDonald's	1	Restaurants	Restaurants	Restaurants	Restaurants	Restaurants
Nando's	1	Restaurants	Restaurants	Restaurants	Restaurants	Restaurants
Nineteen	1	Restaurants	Restaurants	Restaurants	Restaurants	Restaurants

## List of York Venues Currently on DisabledGo's Website

Piccolino	1	Restaurants	Restaurants	Restaurants	Restaurants	Restaurants
Pizza Express	1	Restaurants	Restaurants	Restaurants	Restaurants	Restaurants
Pizza Express	1	Restaurants	Restaurants	Restaurants	Restaurants	Restaurants
Pizza Hut	1	Restaurants	Restaurants	Restaurants	Restaurants	Restaurants
Pizza Hut	1	Restaurants	Restaurants	Restaurants	Restaurants	Restaurants
Ristorante Bari	1	Restaurants	Restaurants	Restaurants	Restaurants	Restaurants
Russells Restaurant	1	Restaurants	Restaurants	Restaurants	Restaurants	Restaurants
Thida Thai Cuisine	1	Restaurants	Restaurants	Restaurants	Restaurants	Restaurants
Wagamama	1	Restaurants	Restaurants	Restaurants	Restaurants	Restaurants
Zizzi's	1	Restaurants	Restaurants	Restaurants	Restaurants	Restaurants
Arkwrights Fish & Chips	0	Restaurants	Restaurants	Restaurants	Restaurants	Restaurants
Burger King	1	Restaurants	Restaurants	Restaurants	Restaurants	Restaurants
Jaipur Spice	1	Restaurants	Restaurants	Restaurants	Restaurants	Restaurants
Maxi's Restaurant	1	Restaurants	Restaurants	Restaurants	Restaurants	Restaurants
McDonald's	1	Restaurants	Restaurants	Restaurants	Restaurants	Restaurants
McDonald's	1	Restaurants	Restaurants	Restaurants	Restaurants	Restaurants
McDonald's	0	Restaurants	Restaurants	Restaurants	Restaurants	Restaurants
Subway	1	Restaurants	Restaurants	Restaurants	Restaurants	Restaurants
Wetherby Whaler	1	Restaurants	Restaurants	Restaurants	Restaurants	Restaurants
Startafresh	0	Sandwich Shops	Take Away Food			
Upper Crust	0	Sandwich Shops	Take Away Food			
York Hog Roast	0	Sandwich Shops	Take Away Food			
South Newlands Farm	1	Self-Catering Accommodation				
Stakesby Holiday Flats	1	Self-Catering Accommodation				
Cox of Yorkshire	0	Shoe Repairs				
Barratts	0	Shoe Shops				
Clarks	0	Shoe Shops				
Clarks	0	Shoe Shops				
Clarks	0	Shoe Shops				
Daniel Footwear	0	Shoe Shops				
Famous Footwear	0	Shoe Shops				
Jones Bootmaker	0	Shoe Shops				
Moda In Pelle	0	Shoe Shops				
Office	0	Shoe Shops				

## List of York Venues Currently on DisabledGo's Website

Annex G

Pavers	0	Shoe Shops
Pavers	0	Shoe Shops
Ruby Slipper	0	Shoe Shops
Scholl	0	Shoe Shops
Shoe Studio	0	Shoe Shops
Shopmobility York	1	Shopmobility (Own)
York Designer Outlet	1	Shopping Centres, Malls & Markets   Shopmobility (Own)   Shopping
Monks Cross Shopping Centre	1	Shopping Centres, Malls & Markets   Shopping Centres, Malls &
Newgate Market	1	Shopping Centres, Malls & Markets   Shopping Centres, Malls &
Amber Interiors	0	Soft Furnishing Retailers
L P G Adams	0	Soft Furnishing Retailers
Ponden Mill	0	Soft Furnishing Retailers
Snow Home	0	Soft Furnishing Retailers
Burn & Company	0	Solicitors
Grays Solicitors	0	Solicitors
Robertsons Solicitors	0	Solicitors
York Sports Village	1	Sport & Leisure Centres
York Community Fitness at	1	Sport & Leisure Centres   Sport & Leisure Centres   Sport & Leisure
Waterworld	1	Sport & Leisure Centres   Sport & Leisure Centres   Sport & Leisure
Rawciff's Intersport	0	Sports Goods
Reebok	0	Sports Goods
Rugby Shop	0	Sports Goods
Up & Running	0	Sports Goods
York City Football Club	1	Sports Grounds & Stadiums   Sports Grounds & Stadiums   Sports
York City Knights Rugby Stadium	1	Sports Grounds & Stadiums   Sports Grounds & Stadiums   Sports
Paper Mill Shop	0	Stationers
Ryman The Stationer	0	Stationers
Signatures of York	0	Stationers
Smart Option Stationery	0	Stationers
Marks & Spencer	1	Stationers   Cafes   Cafes   Cafes   Cafes   Cafes   Clothes Shops
London's Newsagent	0	Stationers   Confectionary retailers   Newsagent   Tobbaconists   Toy
Bits & Bobs	0	Stationers   Cosmetics and Toiletries   Gift Shops   Haberdashers
Strensall Post Office & Village	0	Stationers   Greeting Cards   Hardware Retailers   Convenience Stores
Wallis Business Services Ltd	0	Stationers   Photographic Processing & Printing

List of York Venues Currently on DisabledGo's Website

Asda	0	Supermarkets
Co-op	0	Supermarkets
Co-op Late Shop	0	Supermarkets
Costcutter	0	Supermarkets
Dunelm	0	Supermarkets
Morrisons	1	Supermarkets
Morrisons	1	Supermarkets
Sainsbury's	1	Supermarkets
Sainsbury's Local	0	Supermarkets
Somerfield	0	Supermarkets
United Co-operatives Late Shop	0	Supermarkets
Blenkin & Co	0	Surveyors
Humberts	0	Surveyors
Al Fresco	0	Take Away Food
Ali G Pizza House	0	Take Away Food
Big Bite	0	Take Away Food
Domino's Pizza	0	Take Away Food
Ebor Fisheries	0	Take Away Food
Fat Jackets	0	Take Away Food
Haci's Place	0	Take Away Food
Haxby Fortune Inn	0	Take Away Food
Kippers	0	Take Away Food
Millers Fish & Chips	0	Take Away Food
Mr Sandwich	0	Take Away Food
Osbalwick Fisheries	0	Take Away Food
Singapore Sam	0	Take Away Food
Walmgate Sandwich Bar	0	Take Away Food
Sunshine	0	Tanning Shops
Whittard of Chelsea	0	Tea & Coffee Specialists
Whittard of Chelsea	0	Tea & Coffee Specialists
Carphone Warehouse	0	Telephones Shops
EE	0	Telephones Shops
Vodafone	0	Telephones Shops
Friargate Theatre	1	Theatres & Concert Halls   Theatres & Concert Halls   Theatres &

## List of York Venues Currently on DisabledGo's Website

Joseph Rowntree Theatre	1	Theatres & Concert Halls   Theatres & Concert Halls   Theatres &
Sir Jack Lyons Concert Hall	1	Theatres & Concert Halls   Theatres & Concert Halls   Theatres &
York Barbican Centre	1	Theatres & Concert Halls   Theatres & Concert Halls   Theatres &
Woodlands Neurological	1	Therapy Centres/Services   Therapy Centres/Services   Conference
Choice Select	0	Tobbaconists
Visit York Information Centre	1	Tourist Information Centres
Early Learning Centre	0	Toy Shops
Toys R Us	0	Toy Shops
Toyworld	0	Toy Shops
Poppleton Station	1	Train Stations   Train Stations   Train Stations   Train Stations   Train
Going Places	0	Travel Agents
Going Places	0	Travel Agents
Quartz Travel	0	Travel Agents
Thomson	0	Travel Agents
Thomson	0	Travel Agents
Travel Care	0	Travel Agents
Travel Care	0	Travel Agents
Wallace Arnold	0	Travel Agents
Ability Net	0	Useful Telephone Numbers
Action for Blind People	0	Useful Telephone Numbers
Dial UK	0	Useful Telephone Numbers
Epilepsy Action	0	Useful Telephone Numbers
Headway	0	Useful Telephone Numbers
Housing Standards-Adaptations	0	Useful Telephone Numbers
Supported Employment &	0	Useful Telephone Numbers
Abbeyfields Veterinary Surgery	0	Vets and Animal Services
Battle Flatts Veterinary Clinic	0	Vets and Animal Services
RSPCA York Animal Home	1	Vets and Animal Services
Lamb CD Shop	0	Vinyls, CDs, DVDs & Videos
Inner Space Stations Video	0	Vinyls, CDs, DVDs & Videos   Off Licences
Pronuptia	0	Wedding Services



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**Learning & Culture Overview & Scrutiny  
Committee****24 February 2015**

Report of the Narrowing the Gap Scrutiny Task Group

**Narrowing the Gap Scrutiny Review – Draft Final Report****Summary**

1. This report presents the findings from the recently completed Narrowing the Gap scrutiny review and asks the Committee to agree the Task Group's draft recommendations, to enable the final report to be presented to a future meeting of Cabinet.

**Background to Review**

2. In July 2014, the Committee received a feasibility report on a proposed scrutiny topic on 'Narrowing the Gap' in York. The Assistant Director of Education & Skills informed Members that by the age of 19, the gap in attainment between disadvantaged young people (as defined by them being in receipt of Free School Meals at age 15) and their peers in York were amongst the widest anywhere in the country. She felt a review would help to own this as a collective issue to help improve national performance indicators and narrow the gaps in attainment.

**Background to Pupil Premium**

3. Pupil Premium is a government initiative designed to target resources on those pupils deemed to be from a disadvantaged background. Specifically the pupil premium money is provided for those pupils who have been on free school meals (FSM) as any point over the past 6 years or those pupils who have been looked after continuously for at least 6 months. For the year 2014/2015 the pupil premium had a value of £935 per eligible pupil in secondary education and £1300 per eligible pupil in primary education. The government have not dictated how the pupil premium money should be spent, but what is clear is that the money should be used to promote strategies which narrow the gap in attainment between the highest and lowest achieving pupils.

4. Ofsted Guidance for schools:

*'Never confuse eligibility for the Pupil Premium with low ability, focus on supporting disadvantaged pupils to achieve the highest levels. Thoroughly analyse which pupils are underachieving, particularly in English and mathematics, and why. Draw on research evidence (such as the Sutton Trust toolkit<sup>4</sup>) and evidence from their own and others' experience to allocate the funding to the activities that are most likely to have an impact on improving achievement. Understand the importance of ensuring that all day-to-day teaching meets the needs of each learner, rather than relying on interventions to compensate for teaching that is less than good. Allocate the best teachers to teach intervention groups to improve mathematics and English, or employ new teachers who have a good track record in raising attainment in those subjects. Use achievement data frequently to check whether interventions or techniques are working and make adjustments accordingly, rather than just using the data retrospectively to see if something had worked. Make sure that support staff, particularly teaching assistants, are highly trained and understand their role in helping pupils to achieve. Systematically focus on giving pupils clear, useful feedback about their work, and ways that they could improve it. Ensure that a designated senior leader has a clear overview of how the funding is being allocated and the difference it is making to the outcomes for pupils. Ensure that class and subject teachers know which pupils are eligible for the Pupil Premium so that they can take responsibility for accelerating their progress.'*

5. Government policy changes to Key Stage 4 performance tables made in September 2013 mean that only a pupil's first entry for any qualification now counts in a school's published data. Therefore making direct comparisons in absolute attainment with previous years can be difficult and misleading. However, the gap between the attainment of pupil premium students and non-pupil premium students is still a valid one.

6. Narrowing the Gap: The York Context

In York as is the case nationally there is a strong link between poverty and underachievement. Nationally this has led to increased scrutiny of the outcomes of disadvantaged children through the introduction of the pupil premium.

7. In 2013, there were 172 Y6 pupils in receipt of free school meals in York, spread across 41 of the 51 primary schools in the city. Some schools had higher numbers of these pupils e.g. Clifton Green (14 in 2013) and Hob Moor (10), but most York schools had much lower numbers. In 2013, 12 schools had only 1 such pupil, and a further nine only 2 or 3.

This wide distribution presents a barrier to schools seeing the issue as a 'group' issue rather than the difficulties experienced by a particular pupil. There is a similar spread across other year groups in the primary sector.

8. In York at the end of Primary and Secondary schooling there are about 300 children eligible for the pupil premium. The distribution of the pupil premium cohort varies across the city and this has created pockets of disadvantage.
9. In an effort to close the attainment gap between that cohort and their peers, a project was undertaken to develop a more sophisticated understanding of the cohort through sharing and interrogating school performance and social care data to gain an understanding of the potential barriers to progress for individual pupils. This resulted in an accurate profile of the York 300 cohort in the current Year 5 – see Annex A.
10. In November 2014 the Committee considered the 2014 school outcome data and the profile data on the York 300 cohort which compared their performance against that of their peers. The outcome data showed that progress in narrowing the gap had been made in some key stages, but was not consistent across all key stages. Gaps had narrowed in Early Years Foundation Stage and in Key Stage 2, but had widened in Key Stage 1 and Key Stage 4.
11. For the profile analysis York schools had been divided into geographical and attainment cluster groups, to provide schools with information on how to improve their intervention work. Whilst the results varied from school to school, it appeared those with a smaller number of disadvantaged pupils were struggling to close the gaps, possibly due to funding issues. It also suggested that the current work to narrow the gap was inconsistent and gaps may be narrowing due to fluctuations in the contextual profile of cohorts rather than the impact of the actions taken.
12. Members questioned why some York schools and school clusters had narrower gaps and what could be learnt from their practice, and how those schools with small numbers of pupils eligible for the pupil premium might use that premium more effectively to narrow the gap. They also agreed it would be useful to look at good practice by other Local Authorities achieving narrower gaps, including early years.
13. With this in mind, the Committee chose to proceed with the review and agreed the following review remit:

Aim

To identify and disseminate best practice guidance on narrowing the gap to York Schools.

Objectives

- i. To examine:
  - a) Good practice from other Local Authorities achieving narrower gaps, including early years.
  - b) The actions taken by identified schools in York whose outturn data shows an established trend of narrowing the gap
  - c) The use of the pupil premium to narrow gaps in attainment and progress in those York schools which are consistently narrowing the gap
- ii. To draft some guidance proposals for dissemination through York Schools

14. The Committee set up a Task Group to carry out the review on their behalf and agreed the review was to be completed in time for the review draft final report to be presented at the next formal committee meeting in January 2015.

**Consultation**

15. A number of the Task Group members attended a 'Narrowing the Gap' conference on 9 December 2014. Led by Sir John Dunsford, the conference brought together school representatives and partners to share information and examples of best practice, and focussed on what schools needed to do to further improve their efforts and use of the pupil premium.
16. As part of the review, the Task Group also visited a number of York Schools – see paragraphs 36 – 39 and 42.

## Information Gathered

17. Objective (i/a) - Good practice from other Local Authorities achieving narrower gaps

**Best Start Lancashire** is a school based initiative delivered through children's centres to provide additional early support for children eligible for Free School Meals (FSM) and their families between the ages of 4 and 7 (Reception, Year 1 and Year 2). The resource (£5 million) to enable this innovative programme was implemented in 2011/14 and was targeted at children eligible for FSM.

18. In 2011/12, there were 6869 eligible pupils in the target year groups in Lancashire primary schools, and in 2012/13 there are 7,363 eligible pupils. Children's centres have been allocated £250 per FSM pupil as an additional resource to provide an increased early support offer for schools in their reach area.

19. Key intended outcomes for pupils eligible for Free School Meals were:

- Improved levels of attendance at school
- Improved attainment in speaking and listening and reading skills at the end of the Early Years Foundation Stage
- Improved levels of reading at the end of Key Stage 1
- A reduction in referrals to children's social care that require no further action

20. Impact data for 2013 shows a rise in GLD<sup>1</sup>, increases in the number of Y1 pupils passing the phonic screening check and children attaining 2C in reading at the end of KS1. Also attendance has improved.

21. The **RADY Project** in Wirral is based around KS3 target setting in secondary schools i.e. the children involved are the Year 7 and Year 8 cohorts (those children who would complete KS4 in 2016 and 2017). A total of 1287 pupils are currently involved.

22. The vast majority of schools set targets that are, to a greater or lesser extent, based on prior attainment.

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<sup>1</sup> GLD = Good Level of Development (the benchmark for Early Years Foundation Stage, children at the end of the reception year in school)

This includes targets that reference FFT<sup>2</sup> estimates and targets based on all pupils making three levels progress in English and maths. The net result of this is that there is a built-in gap in the targets - the targets for FSM children are systematically lower than those of non-FSM children. This is because FSM children on average leave KS2 with lower results than non-FSM children.

23. As part of the project, the schools made a commitment to set equality targets and ensure they focus intervention swiftly on those pupils falling behind the inspirational target. Once the targets are set, it is probable that FSM children will feature more prominently in the underachieving group than they would otherwise have been. Therefore any intervention targeted at underachieving pupils will naturally make its way to disadvantaged children more often than in previous years. This is a key principle behind the RADY methodology. RADY does not provide intervention—its aim is to provide precision information on which pupils are most in need of extra support at the time it is likely to have the greatest impact.
24. The **Progress Centre at Stantonbury Campus School** in Milton Keynes provides a range of programmes developed in response to the particular needs of Pupil Premium students. Launched fully in September 2013, the programmes fall in to two categories – Academic Intervention and Support Intervention. The Progress Centre team consists of a Manager and three outreach workers each focussing on a different area for improvement – achievement, attainment and family support. The Progress Centre also co-ordinates opportunities for inspirational and enrichment activities and trips, as well as offering financial support to those pupils who require it in order to participate in other school activities.
25. Since its soft launch in April 2013, more than 600 pupils have engaged with The Progress Centre’s services or programmes. From April – July 2013, 27 Year 11 pupils were provided access to six hours of academic tutoring in either English or maths. From this cohort, 60% achieved three or more levels of progress from their GCSE results.

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<sup>2</sup> FFT estimates = Fischer Family Trust estimates – schools use this to set targets for their pupils.



26. In the last two years, attainment by pupils eligible for Free School Meals (FSM) has risen by 22%, with 36% of pupils achieving five A\* – Cs in English and maths. In the same period, the gap between FSM and non-FSM pupils has narrowed to 19%; a 9% improvement.
27. Pupil Premium 2014 Awards  
The Task Group received information on the Pupil Premium 2014 award winners, with detailed case studies from 4 winners – two primary schools and two secondary schools (one of each were national winners and the other two were regional winners) – see Annex B.
28. Pupil Premium Conference  
The conference in early December 2014 was well attended by representatives of York schools. Those attending were encouraged to share their strategies for raising the attainment of pupil premium eligible students, and detailed a number of measures that they felt were helping to make a difference e.g. improving attendance, using data to frequently track the impact of actions on improving progress, reducing class sizes, alternative teaching methods, raising aspirations of pupils, parents and teachers/staff, engaging parents and raising their expectations.
29. Attendees were talked through a step by step strategic planning process:
- ✓ • Identify barriers to learning for PP pupils
  - ✓ • Decide your desired outcomes
  - ✓ • Identify success criteria for each outcome
  - ✓ • Choose your PP strategies
  - ✓ • Implement strategies with in-depth training
  - ✓ • Evaluate strategies regularly
  - ✓ • Tell the story – create an audit trail
30. Attention was also drawn to a teaching and learning toolkit provided by the Education Endowment Foundation which offers an accessible summary of educational research, providing guidance for teachers and schools on how to use their resources to improve the attainment of disadvantaged pupils. The Toolkit currently covers 34 topics, each summarised in terms of their average impact on attainment, the strength of the evidence supporting them and their cost – see:  
<http://educationendowmentfoundation.org.uk/toolkit/>
31. The effect of poor teaching on student progress was also identified, suggesting that spending pupil premium on quality teaching was key. Finally, the conference highlighted the good work being undertaken by two York schools – **Milthorpe & Westfield**, whose case studies presented two different approaches.

Milthorpe focuses on the need to fully evaluate data before, during and after setting measurable targets, and Westfield bases its approach of addressing all the needs of a PP pupil and supporting their family to ensure the best possible outcomes.

32. At the conference reference was also made to the excellent work being undertaken at **Roundhay School** in Leeds. During the schools most recent OFSTED inspection, it was observed that *“Roundhay School is all about its students. Staff ensure that each one, regardless of background or ability, is given every opportunity to shine”* (Ofsted, Nov 2013). This comment captured the philosophy adopted at Roundhay School and is the reason why over the last 4 years, gaps in achievement are, on the whole, narrowing.
33. As a result of their success Roundhay School was invited, by the National College for Teaching and Leadership, to become a **Pupil Premium Review centre** so that their good practice can be shared with other schools. Further information can be found at:  
<http://www.education.gov.uk/nationalcollege/pupilpremiumreviews>
34. In late January 2015 a member of the Task Group (Cllr Fitzpatrick) visited the school to learn more about their good practice – see Annex C.
35. Objective (i/b) - York schools whose outturn data shows an established trend of narrowing the gap  
The Task Group considered the initiatives/strategies being undertaken by two York schools (Woodthorpe and New Earswick) whose outturn data shows an established trend of narrowing the gap, – see Annexes D & E –see page 7 onwards of the Woodthorpe report and the table on page 1 of the New Earswick report. Similar information on other York Schools can be viewed via each school’s website.
36. The Task Group also visited a number of York schools in order to gauge the uptake of the best practice approach presented at the Pupil Premium Conference, and to gather information on the initiatives schools are implementing, how they are using their pupil premium, the specific barriers they are facing, and who is leading on narrowing the gap.
37. Taking account of the information in Annex F which details the outcomes of KS1, KS2 and KS4 pupils in schools across the city, the Task Group chose to visit the following schools:

- Archbishop Holgate's School
- Badger Hill Primary School
- Carr Infant School
- Clifton & Rawcliffe Primary School
- Fulford School
- Our Lady Queen of Martyrs School

38. For illustration purposes, the information in Annex F is separated to show schools with more than 5 FSM pupils in a cohort, and in the case of KS1, those schools with fewer than 5 FSM pupils in a cohort as well. It also identifies those schools who attended the conference, together with their feedback on the conference.

39. To aid them in their visits, the Task Group agreed a number of opening questions:

- How long have you been the designated PP lead?
- How much time are you able to allocate to this role and how do you use this time?
- What has the impact of your role been on narrowing the gap?
- Which strategies have worked best in your school?
- What hasn't worked so well?
- How frequently do you evaluate strategies?
- Which, if any, of the Education Endowment Fund toolkit strategies have you utilised effectively?
- Over the last three years, have you changed your approach as a school?
- What has informed your decision making?
- How has the demographic changed in terms of numbers of pupil premium eligibility?
- Pupil Premium Conference – what did your school take away from this day if you attended?
- If your school did not attend, have you accessed the materials from this day?

### **Analysis**

40. Having considered all of the best practice information from elsewhere (as detailed in paragraphs 17 - 27 above and in Annexes B & C) the Task Group were pleased to note that schools in York are utilising similar methods to support their pupil premium students to narrow the gap and achieve favourable outcomes.

41. They were also pleased to see the commitment to this work as evidenced by those York schools who attended the Pupil Premium Conference in December 2014. They also noted the different approaches taken by the York schools used as case studies at the Conference.
42. Furthermore, the Task Group were pleased to note how keen schools were to be involved in the scrutiny review and they were made very welcome on their school visits. Each school attended evidenced their approach to identifying appropriate strategies to help narrow the gap for individual children i.e. bespoke interventions. They were frank in their discussions about what had not worked so well and what the barriers were. They also provided detailed information on how pupil premium was managed in their school.

### **Review Conclusions**

43. Building on the good practice already established by York schools working together, the Task Group recognised that school to school support will be key in the future as Local Authority resources further reduce.
44. The Task Group agreed that the use of pastoral support workers (non teaching staff) to engage in home school liaison and in-school support was particularly effective.
45. Furthermore, evidence showed that where a multi-agency approach had been taken, pastoral interventions to narrow the gap had been more successful, as it helped to identify the wider needs of the family. The Task Group agreed this needs to be further developed in York to ensure best practice in multi-agency working across all schools.
46. In regard to the established clusters, the Task Group acknowledged the benefits that cluster working brings and were keen to see them continue with their action plans for narrowing the gap. They would also encourage schools to maintain their dialogue at cluster group meetings on how best to use their pupil premium money, as it will help them to identify opportunities to work holistically/collectively on interventions.
47. To maximise the benefits of educational continuity, the Task Group agreed that York's clusters should continue to develop an all through approach i.e. 0-19 to support smooth transitions (as witnessed at Roundhay).

Noting the forthcoming introduction of early years pupil premium which comes on board in September 2015, the Task Group noted the opportunity this would provide for primary schools to link up with pre-school providers to ensure the best starts for disadvantaged pupils.

48. The Task Group recognised that the introduction of FSM for all at KS1 may inhibit the ability of schools to access their entire pupil premium funding entitlement. They therefore agreed that schools should continue to work with the Local Authority to ensure all those who are entitled are identified and encouraged to apply.
49. The Task Group noted the lack of consistency in outcomes and agreed that schools should focus on the impact of the strategies they implement in order for vulnerable students to make measurable progress and for their schools to achieve a narrowing of the gap.
50. Overall, the Task Group agreed that no single intervention could provide a complete solution to the complex educational issues in any school and it is therefore a multi-faceted approach that offers the best opportunity for pupils to succeed. They also recognised that whilst good work is going on in all York schools, there may be times where either low numbers or exceptional circumstance within a particular cohort, skew the results. They would therefore encourage all schools to develop resilience and to continue in their determination to narrow the gap.

### **Draft Review Recommendations**

51. In light of their work on this review, the Task Group identified the following draft recommendations for this Committee's consideration:
  - i) A virtual network for schools to be set up, to share best practice and feedback on the impact of the strategies used, encourage and assist in school to school support, and cluster working.
  - ii) A holistic approach to using pupil premium money should be encouraged, including school readiness projects in pre-school settings
  - iii) To continue to develop multi-agency working to assist with the narrowing the gap agenda.
  - iv) Schools to continue to build strong partnership working between home and school.

- v) Continued encouragement and support to be given to parents of all FSM KS1 pupils, to ensure schools receive full entitlement to pupil premium funding.
- vi) For the Local Authority to work with schools to publicise the importance of eligible families registering for pupil premium in KS1.
- vii) That the recommendations above be used to form the basis of a citywide strategy.

### **Associated Implications & Risk Management**

- 52. **HR** - There are no HR implications associated with the recommendations above. The team are already focusing on supporting schools to narrow the gap and the recommendations will help to focus their work around specific actions.
- 53. **Financial** - There are no significant financial implications resulting from the recommendations, and the cost of any proposed actions can be contained within existing LA and school budgets.
- 54. There are no Legal or other implications associated with the recommendations above, and no associated risks have been identified.

### **Options**

- 55. Having considered the information provided in this report, the Committee may choose to:
  - a) Revise this draft final report
  - b) Revise and/or identify alternative review recommendations
  - c) Endorse the draft review recommendations as listed above and sign off this report.

### **Council Plan 2011-15**

- 56. The review of this scrutiny topic supports the Council's priority to protect vulnerable people.

### **Report Recommendations**

- 57. The Learning & Culture Overview & Scrutiny Committee are recommended to:

- Note the review findings and conclusions as detailed in paragraphs 15 - 50 above.
- Endorse the Task Group draft recommendations as listed in paragraph 51 above.

Reason: To conclude the review in line with scrutiny procedures and protocols and enable the agreed final report to be presented to a future meeting of Cabinet.

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**Report Approved**  **Date** 12/2/2015

**Specialist Implications Officer(s)** None

**Wards Affected:**

**All**

For further information please contact the author of the report

**Background Papers:** None

**Annexes:**

**Annex A** – York 300 Analysis Update: Pilot Cohort Compared with Peers

**Annex B** – Information on Pupil Premium 2014 Award Winners

**Annex C** – Information on Roundhay School, Leeds

**Annex D** – Woodthorpe Primary School – Pupil Premium Expenditure Report

**Annex E** – New Earswick Primary School – Pupil Premium Impact & Spend Summary

**Annex F** – Outcomes of York's KS1, KS2 and KS3 pupils and Conference Feedback

**Abbreviations:**

DfE – Department of Education

GLD - Good Level of Development

FSM – Free School Meals

FFT - Fischer Family Trust

KS – Key Stages



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## Strategic Business Intelligence Hub

# York 300 Analysis Update: Pilot cohort compared with peers

Author: Hannah McNamee,  
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Date: September 2014

### Contents

1. Introduction .....	2
2. September 2014 update .....	2
Demographic.....	2
Special Educational Need.....	3
Attendance.....	3
Exclusions.....	3
Mobility.....	3
Key Stage 1 Attainment .....	4
Partnership involvement.....	4
3. Cluster groups .....	5
Attainment by cluster .....	5
4. Considerations and Next Steps .....	6
Annex A: York School Clusters .....	7
Annex B: Key Stage 1 Attainment by Cluster .....	8



## 1. Introduction

The links between poverty and multiple poor outcomes are well documented. The *York 300 Brief* outlined how we used *Pupil Premium eligibility* to define a cohort of young people within the 2014/15 academic year 6 who are most at risk of failing.

## 2. September 2014 update

Following feedback about the *York 300 Pilot Cohort Analysis*, this report has been written to compare the York 300 Pilot Cohort with their peers. Their **peers** are defined as the pupils in the same year group (2014/15 Year 6) who are **not** in the York 300 Pilot. Comparing these two groups will bring the York 300 Pilot in line with national methods used to analyse “narrowing the gap” between disadvantaged pupils and their peers.

To recap, there were 1791 pupils in the whole year group, 350 of whom were identified for the York 300 Pilot using the criteria outlined in the *York 300 Brief*. This means that there are 1441 pupils in the “Peer group”.

Throughout this report, comparisons are drawn between the “Pilot cohort” and their “Peer group”.

### **Demographic**

The main characteristics of the pupils in the Pilot and Peer groups do not differ greatly.

<b>Pilot cohort</b>		<b>Peer group</b>
48%	Boys	53%
7% (25 pupils)	Not White British	7%
36%	Summer-born	37%
3% (12 pupils)	Speak English as an additional language	6%
7%	Non White British	11%

The differences between the Pilot and Peer groups are seen when wider education information is analysed.

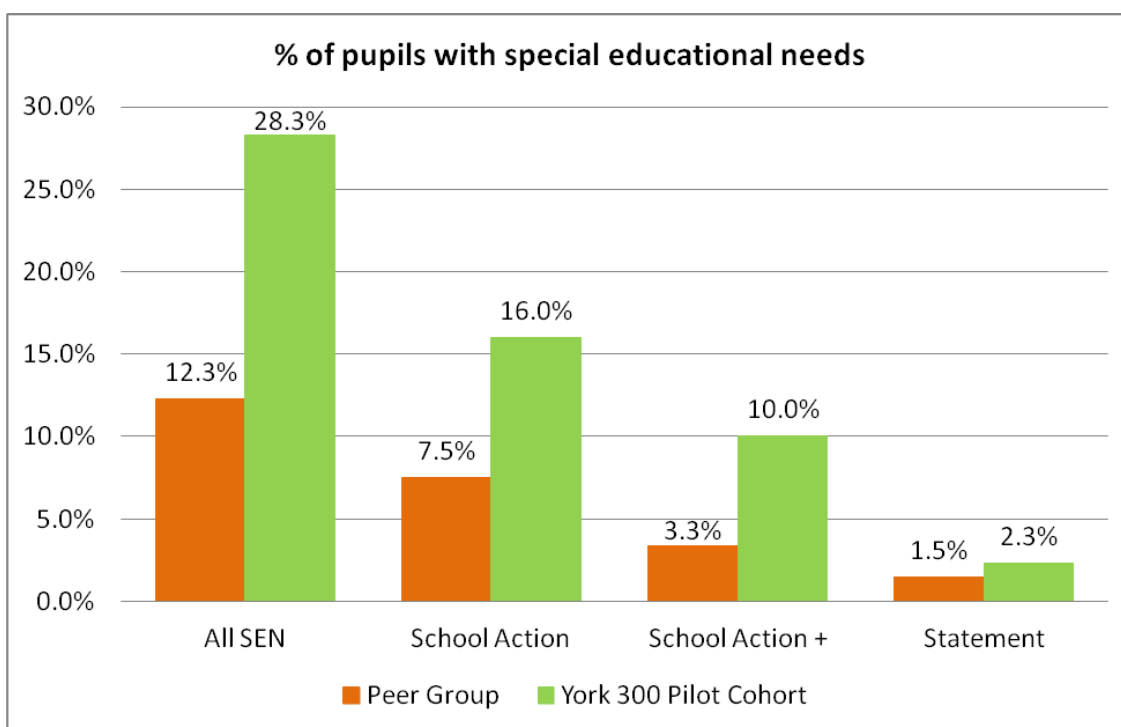
We looked at characteristics and factors that are known to be linked to multiple poor outcomes for children and young people.



### **Special Educational Need**

28.3% (99) of the Pilot cohort had some form of special educational need (SEN) in January 2014. This compared to 12.3% of the Peer group indicating a 16%pt gap, indicating a greater challenge for the Pilot cohort

Looking at the different levels of SEN, School Action and School Action Plus had the largest gaps when comparing the Pilot and Peer groups.



### **Attendance**

A persistent absentee is defined as a pupil whose **unauthorised** absence is more than 15%.

6.3% (22) of the Pilot cohort were defined as persistent absentees in the Autumn Term of 2013/14 (most recent available attendance data). Only 1.6% (23) of the Peer group were persistent absentees during the same period.

### **Exclusions**

2.0% (7) of the Pilot cohort pupils received exclusions in the Autumn Term of 2013/14, compared to 0.2% (3) of the Peer group.

4 pupils in the Pilot cohort were excluded in both the 2013/14 Autumn Term and the 2012/13 academic year.

### **Mobility**

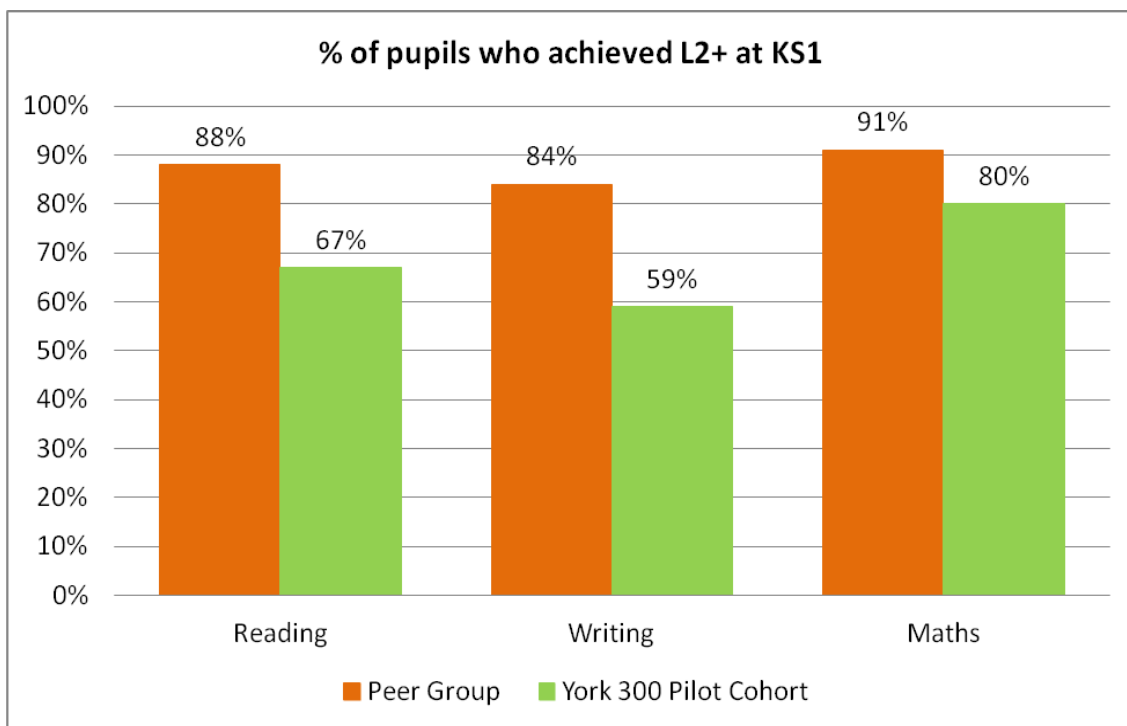
2.9% (10) of the Pilot cohort had moved schools 3 or more times since they started KS1. Less than 1% (0.6%, 8 pupils) of the Peer group had experienced the same level of mobility.



### Key Stage 1 Attainment

The attainment gaps between disadvantaged children and their peers are well documented. Research shows that pupils from poorer families who do not achieve 'expected' levels at a young age are less likely to close the gap later in education (*Too Young To Fail*, 2013).

The graph shows the percentage of pupils who achieved expected levels at KS1 in Reading, Writing and Maths for the Peer and Pilot cohorts.<sup>1</sup> In all subjects, the gaps between those achieving expected levels are an area of concern. Also of note, boys have a larger gap than girls in all three subjects.



### Partnership involvement

The associations between multiple poor outcomes are well documented nationally and in York. We looked at whether the pupils in the Pilot cohort had any current or past involvement with partnership agencies.

With this in mind, we collated partnership involvement data about the Pilot cohort:

- 12 (3.4%) of the 350 pupils in the Pilot cohort had experience of the care system. Approximately 0.6% of children and young people in York are looked after, highlighting an over-representation in the Pilot cohort.
- 23 (6.6%) of the 350 pupils had a current and/or existing Child Protection Plan. Again, this is an over-representation when compared to the York population (0.4%).
- A small number of the *whole year group* were known to the Traveller service.
- There was no record of any pupil in the year group working with Personal Support and Inclusion workers (Youth Support Services).

<sup>1</sup> We did not obtain KS1 results for 41 pupils in the Peer group and 8 in the Pilot cohort.



### 3. Cluster groups

York schools work in Cluster groups to support school improvement. The clusters largely align with geographical areas of the city. For a list of schools in each cluster, go to [Annex A](#).

The whole year group was split into cluster groups based on current school in January 2014.

36% of the Pilot cohort attended schools in the West cluster, compared to only 18% of the Peer group. Whilst this finding is not unexpected given that the West cluster aligns with some of York's most deprived areas, this is a vast over-representation in the West cluster.

Cluster	Pilot cohort	Peer group	% difference (rounded)
West	36%	18%	18%pt
North East	18%	24%	-7%pt
East	14%	10%	4%pt
North	13%	14%	-1%pt
Southbank	11%	19%	-8%pt
South	8%	14%	-5%pt

#### ***Attainment by cluster***

We divided pupils into their current cluster groups (in January 2014) then looked at their KS1 attainment in Reading, Writing and Maths. In the three core subjects, there were attainment gaps between the Pilot cohort and their Peer group.

The data showed that pupils in the East and West clusters struggled to keep up with York averages, regardless of whether they were eligible for Pupil Premium. This indicates a wider challenge for those clusters as both the Pilot and Peer groups fall below average.

#### **Reading**

An area of concern is in the South cluster where there was an 18%pt gap. The Pilot cohort were below average whereas their peers were above average.

Conversely in the Southbank cluster, the Pilot cohort were above average and their peers below, with only a 2%pt gap.

#### **Writing**

The largest gaps were seen in this subject, something that was documented in 2011 when these results were released. There was a 22%pt gap in the North cluster and a 20%pt gap in the East cluster.

#### **Maths**

The East cluster had the largest gap (15%pt) in Maths as well as the poorest performance in comparison with other clusters.

The South and Southbank clusters had very small gaps (4%pt and 6%pt respectively).



#### 4. Considerations and Next Steps

As anticipated, this update which compares the Pilot cohort with their Peers shows larger gaps than the original analysis. To recap, this is because the Pilot cohort were a sub-set of the original comparator group.

The challenge continues to be to work with the Pilot cohort and monitor their progress over the academic year.

##### Considerations:

- Are pupils in the Pilot cohort getting additional support from partnership agencies?
- Do we focus on the poor performing clusters, or the clusters with the largest gaps between the Pilot cohort and their peers?
- Do we focus additional support in the West, North East and East clusters?
- How do we ensure the voice of pupils and their families is incorporated?

##### Next steps:

- Update cohort when October Census data is complete – e.g. remove any pupils who have moved out of area
- Engage schools and partners to work with the 350 pupils, or a subset of them, during the 2014/15 academic year.



## Annex A: York School Clusters

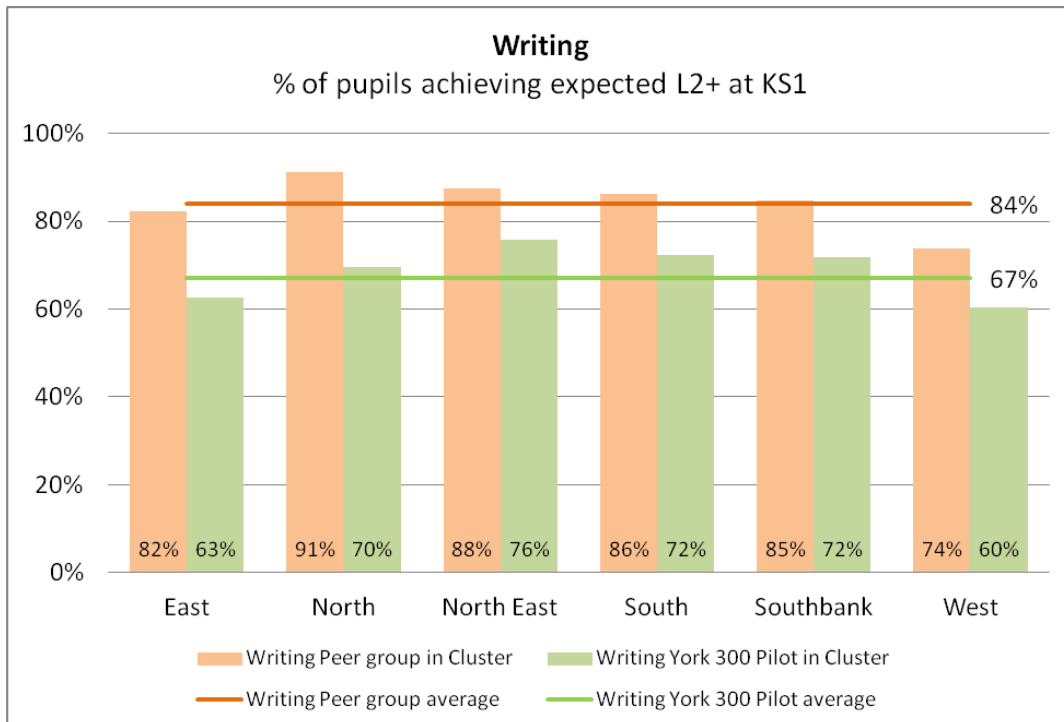
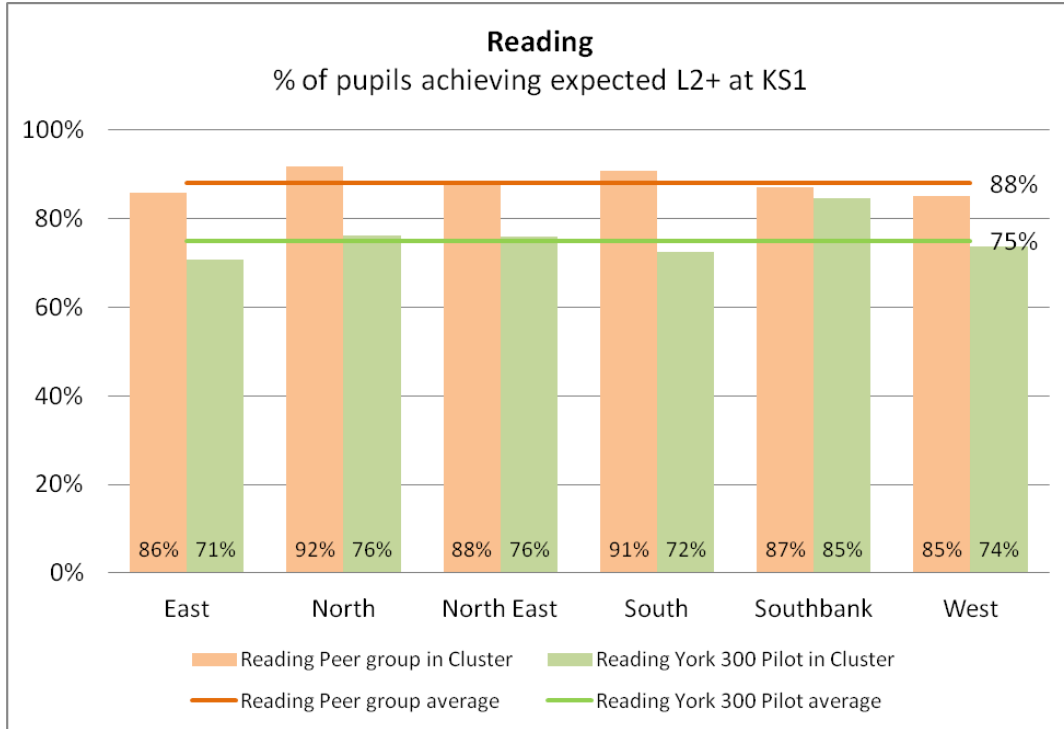
To follow is a list of schools in each cluster. Overall, the clusters align with geographical areas of York.

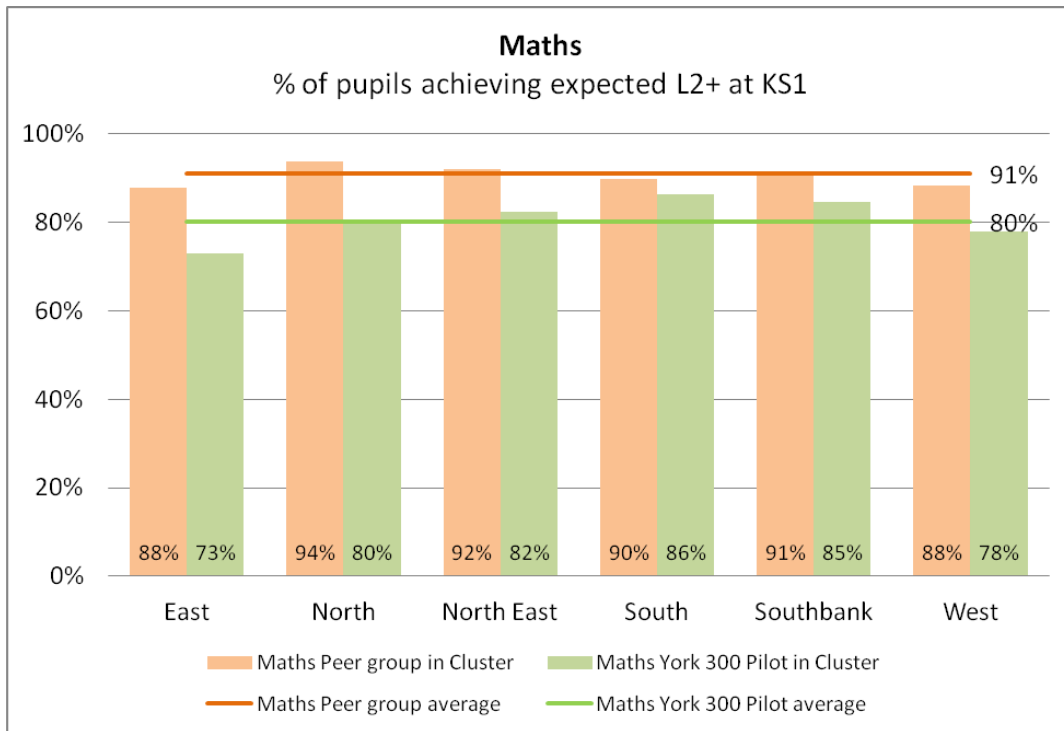
Southbank	West	South	East	North East	North
Archbishop of York Junior	Acomb	Dunnington	Badger Hill	Haxby Road	Burton Green
Bishopthorpe Infant	Carr Junior	Elvington	Hemland	Headlands	Clifton Green
Carr Infant	Hob Moor Federation (Junior and Oaks)	Fishergate	Heworth	Huntington Primary	Clifton with Rawcliffe
Copmanthorpe	Our Lady, Queen of Martyrs	Lord Deramore's	Osbalwick	New Earswick	Lakeside
Dringhouses	Poppleton Road	Naburn	St Aelred's	Park Grove	Poppleton Ousebank
Knavesmire	Rufforth	St George's	St Lawrence's	Ralph Butterfield	Skelton
Scarcroft	St Barnabas	St Oswald's	Tang Hall	Robert Wilkinson	
St Mary's	Westfield	Wheldrake		Stockton-on-the-Forest	
St Paul's Nursery	Woodthorpe			Wigginton	
St Paul's Primary				Yearsley Grove	
St Wilfrid's					
All Saints	York High School	Danesgate	Applefields	Huntington	Canon Lee
Millthorpe		Fulford	Archbishop Holgate's	Joseph Rowntree	Manor
			Burnholme		



### Annex B: Key Stage 1 Attainment by Cluster

The following are graphical representations of Key Stage 1 attainment. The Pilot Cohort and Peer Groups were split by cluster and compared against whole group averages.





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## Pupil Premium 2014 Award Winners

### Primary

- National Winner: Park Junior School, Shirebrook, East Midlands – see *case study A below*.
- National Runner Up: St Joseph's Catholic Primary School, Holborn, London

### Regional Winners

- Queens Park Academy, Bedford, East of England
- St Francis CofE (Aided) Junior School, Newton Aycliffe, North East
- All Saints C.E. Primary School, Whitefield, North West
- IQRA Slough Islamic Primary School, Slough, South East
- Morice Town Primary School, Plymouth, South West
- Flax Hill Junior Academy, Tamworth, West Midlands
- St Andrews CE Primary School (VA), Hull, Yorkshire and the Humber – see *information from the school's website below*

### Secondary

- National Winner: Millfield Science & Performing Arts College, Thornton-Cleveleys, North West – see *case study B below*.
- National Runner Up: Goffs School, Cheshunt, East of England

### Regional Winners

-

- De Lisle College. Loughborough, East Midlands
- St Thomas More Catholic School, Wood Green, London
- Bishop Barrington School, Bishop Auckland, North East
- Wilmington Academy, Dartford, South East
- West Exe Technology College, Exeter, South West
- Ormiston Sir Stanley Matthews Academy, Stoke-on-Trent, West Midlands
- South Hunsley School and Sixth Form College, Melton, Yorkshire and the Humber – see *information from the school's website below*

## **Case Study A - Park Junior School (primary national award winner)**

### **1. Introduction**

The school is an average-sized junior school in Nottinghamshire, in an area of high social deprivation. In 2012-13, 47% of pupils attracted the pupil premium and the school received £94,000 in pupil premium funding. All pupils at the school, including those who are disadvantaged, achieved level 4 or above in reading, writing and mathematics at the end of key stage 2 in 2013. This makes Park Junior one of the top 250 performing primary schools in terms of the progress and attainment of both all pupils and disadvantaged pupils.

### **2. What did they do?**

When the pupil premium was first introduced in 2011, the school had successfully introduced a school-wide system to reward pupils who apply themselves in class and meet the school's high standards for behaviour. Such pupils become 'Super Students' and earn 'Pride Points' that can be spent on items in the pupil-run school shop, or on privileges such as running their own clubs and assemblies without any adults present. Pupils are told that 'the more you learn, the more you earn', to emphasise that by working hard in class they can acquire more of the school's currency – and real financial benefits in later life.

This approach has increased pupils' motivation to study, and they better understand their roles and responsibilities within their education. But the school saw that further action was needed to ensure that these gains could be translated more fully into improved attainment. The school decided that it was imperative to empower pupils to drive their own learning, in a structured and supported way. This arose from the executive head teacher reading the evidence cited in the Sutton Trust/EEF Teaching and Learning Toolkit (on feedback, meta-cognition, peer tutoring and collaborative learning), and subsequently meeting with the Sutton Trust/EEF to discuss ideas.

The result was the school's 4 Steps strategy. This gives pupils a clear method to use when they encounter something in a lesson that they do not understand or cannot do:

- Step 1: look up at the whiteboard
- Step 2: look down at your book (and review what you have learned previously)

- Step 3: ask a friend to teach you
- Step 4: put your hand up and ask the teacher to teach again and if you are still stuck ask the teacher to teach again

Pupils are trained by the executive head teacher in how to apply the approach, using videos and presentations produced by the school. The outstanding learning behaviour in the classroom allows the teacher to teach in a fundamentally different way. This they call 'Precision Teaching'. Through a combination of effective assessment for learning and pupils' advanced learning behaviours, the children make hugely accelerated progress through every lesson. Each lesson is organised around 8-10 teaching interventions by the Outstanding Teaching Team, with pupils studying in small, self-selecting groups.

The strategy has transformed pupil learning in the school. Pupils are completely focused and engaged, and a lot of the time work independently of the teacher and support one another. All pupils understand that if they can complete an objective, they are responsible for progressing to the next one. The strategy enables every pupil to keep on making progress at all points of every lesson, and there is a huge emphasis on the pace of study. The school's 2014 Ofsted report states that "teachers consistently challenge the pupils and are regularly heard to say, 'Not a minute needs to be lost with our learning'. This means progress in lessons is often outstanding."

The pupil premium funding has been used to support all of these developments – contributing to the costs of the reward system, engaging with the Sutton Trust/EEF, producing the pupil training videos and recruiting additional 'apprentice assistants' who support pupil premium-eligible pupils individually or in small groups.

### **3. What next?**

As all pupils at Park Junior now achieve the expected standard in reading, writing and mathematics at the end of key stage 2, the focus is on increasing the proportion of disadvantaged pupils who achieve a higher level in this assessment.

The school also plans to improve teaching quality through adapting the 'lesson study' model that it already uses. This involves a teaching team designing a lesson, which one teacher then delivers while the others observe and analyse, with the lesson plan then being refined. The school will adapt this model to its own setting, where the pace and coverage of lessons are heavily pupil-driven rather than being entirely pre-planned.



The school's ambition is also to develop a 'learner study' equivalent, in which pupils will look at the quality of their peers' learning, and feed back to them on it.

**Primary regional winners (Yorks and Humber) St Andrew's CE Primary School, Hull** (information from the school website regarding 2013/14)

**Pupil Premium Grant 2013/14**

For the academic year 2013/14 we receive £600 per pupil for FSM and £300 for Service children – total allocation £61,450. The table below details how we plan to use the money.

<b>Activity / Initiative / Staff</b>	<b>Purpose/ Intended impact</b>
Extra teaching and support staff in Year 1 – additional tuition one day per week	Raise attainment in Year 1 for FSM pupils
Extra teaching and support staff in Year 6 –additional tuition two days per week	Raise attainment in Year 6 for FSM pupils
Additional staffing in years 1-6	Raise attainment in KS2 for FSM pupils
Reading Recovery support increased	Raise attainment in Year 1/2 for FSM pupils
ICT provision increased/improved	Ensure children have additional equipment to promote independent research and independent learning - also promote enjoyment and engagement
Purchase of a new maths scheme	To develop maths skills across the school and close the gap in attainment
Lexia scheme/ Phonics support	Daily phonics support through ICT and TA support - intervention programme closely linked to reading support work
Music Tuition	To support one of our Service children – develop enjoyment and engagement

Purchase of Assertive mentoring scheme	Assertive mentoring programme to develop independent skills, one to one tuition, accurate Maths and English assessment
Greater variety of extra-curricular clubs	To promote attendance and engagement in all school curriculum areas
Subsidising of trips when applicable	Increase in attendance and engagement
To create reading resource research areas in Upper and Younger school	KS1 – Reading recovery/ phonics support room, KS2 – Independent learning/resource area  Encourage independent working – promote raised levels of self-confidence, enjoyment and engagement
Re-launch of 'DAZZLE' and 'Crackerjack' (sessions of engaging, enjoyable activities to promote enjoyment of learning) along with increase in number of visiting coaches	Celebrate musical/ creative arts talents throughout the school  Further improve enjoyment/engagement. and attendance  Create increased opportunities for Pupil Directed Learning

## **Case Study B - Millfield Science and Performing Arts College (secondary national award winner)**

### **Introduction**

Millfield is a smaller than average sized secondary school of 800 students. The proportion of students known to be eligible for the pupil premium is above average and their proportion of students of minority ethnic heritage is lower than average. The ever 6 PP figure is 30%. In 2013, 73% of disadvantaged pupils achieved at least 5+ A\*-C GCSEs (or equivalent) including English and maths GCSEs compared to 76% of other pupils.

In 2014 disadvantaged students out performed more disadvantaged students by a figure of about 2% for 5 A\* - C EN/MA, English progress and Maths progress. For example expected progress for disadvantaged was 96%, for none disadvantaged was 92%. "The school makes good use of pupil premium funding to provide additional support to eligible students. All teachers have a high awareness of target groups, so students' additional needs are similarly well attended to in lessons. As a result, the gap between these students' achievements and that of their peers is narrower than it is nationally." Ofsted Inspection Report October 2012.

"We see no barriers to achievement; we accept no excuses for failure" S M Bullen (head teacher Millfield Science and Performing Arts College).

### **What did they do?**

Millfield College has 4 key strategies when using the pupil premium:

1. Big investment in new Maths and English Teachers to create smaller English and Maths classes – this has been particularly successful in Millfield.
2. Use of Pupil Premium co-ordinators in core subjects. The school has 3 members of staff tasked with monitoring and intervening for Pupil Premium students.
3. Work on Wednesday' day every Wednesday in Year 11. Some Students on target go out to local primaries or businesses and complete a day's work experience in an area of personal choice. Students not on target stay in school to do extra Maths and English with their class teachers.
4. Team Millfield a team of staff, parents and students who work together providing additional pastoral staffing to work on one to one mentoring and support with a focus on students who are eligible for the pupil premium.

The school has restructured staff within school to add an additional emphasis on Student Support Services as a central support mechanism for all students. They have made available considerable additional targeted time from their teaching assistants to run catch up and support sessions, for example in English, Maths, Homework Club and Breakfast Clubs for disadvantaged students.

The College's Pupil Premium Strategy Group meets half termly to monitor the progress of pupils who attract the pupil premium. The pupil premium co-ordinators provide termly reports in English, Maths and science to the Group.

### **What next?**

The school is part of an organised network of other schools that learn from each other and share good practice. They have successfully bid for £10,000 (local source) to support a project of 5 local schools looking at the impact of pupil premium funding. Millfield has also arranged a pupil premium training day in November to share good practice with other local schools. 34 colleagues attended.

In addition, the Headteacher has delivered bespoke sessions on PP to Cumbrian Headteacher's, Stockport Headteacher's and North-West Manchester Headteacher's. He is also speaking briefly at the National PP Conference in London in February.

### **Secondary regional winners – South Hunsley School and Sixth Form College, East Riding (information from the school website)**

South Hunsley School and Sixth Form College has been named secondary school of the year for the Yorkshire and Humber region in the Pupil Premium Awards 2014.

South Hunsley has been awarded this accolade in recognition of the way the pupil premium funding has been allocated and how this helped improve the progress levels being made by pupil premium funded students during their GCSE years. Pupil premium funded students in South Hunsley have made the same levels of progress in the school in English as other groups of students. In Maths, the additional intervention has meant that pupil premium funded students are predicted to make more progress than some other groups of students.

South Hunsley has used its Pupil Premium to implement a number of schemes throughout the school to help all students to achieve their full potential whilst also specifically supporting students identified for pupil premium support. Pupil premium funding has been used to introduce literacy and numeracy programmes, set up holiday and after school boosters and offer peer to peer reading registrations and numeracy mentoring. Personalised timetables, speech and language therapy, social skills and life skills groups and mentoring for students with low self-esteem have also contributed to narrowing the gap in student attainment at South Hunsley.

Julie Wickenden, Assistant Headteacher for Inclusion said: “We are absolutely delighted with this recognition. We have high aspirations for all of our students and it is always a team effort to help them reach their potential and ensure any unmet needs are addressed swiftly. This award reflects the hard work of our Maths and English departments, our Inclusion team, the Pastoral team and all teachers who work with our students.”

In a letter from the Deputy Prime Minister, South Hunsley is praised for its hard work in boosting the attainment of pupil premium students: “This is a huge achievement and reflects the hard work of you, your team and your pupils. We received nearly 200 entries this year and the standard was very high.”

Chris Abbott, Executive Principal of South Hunsley, also shares her delight: “This is a fantastic achievement for the school and I am so pleased the hard work of all our staff and pupil premium students has been recognised on a national level.”

Pupil Premium is additional funding allocated to schools to support specific students to raise achievement and improve education outcomes. These students are identified from families who are eligible for free school meals, looked after children and those students with parents in the armed forces. Funding is provided to make sure these groups of students have the same educational chances as other groups of students.

### Roundhay School, Leeds

Roundhay School is a multi-cultural comprehensive with approximately 25% of pupils being eligible for pupil premium funding. Roughly a quarter of their pupil premium students have a Special Educational Need (SEN), as compared to about 15% on non-pupil premium students.

At Roundhay, closing the attainment gap is done via 'Core Raising Achievement' meetings involving Team Leaders and relevant Senior Leaders and through regular data collections covering both academic achievement and also attitudes to learning, to inform effective interventions. At the primary campus, pupil progress meetings and Leading Learning Team meetings inform decisions about the relevant interventions for identified pupils.

Interventions come in a variety of forms but are specific to the needs of the pupil/group of pupils and not simply generic strategies. Examples of such strategies at Roundhay include:

- The creation of an extra Maths set in year 11 to give smaller class sizes for those pupils in need of closer monitoring/intervention.
- The creation of a year 11 challenge designed to motivate and inspire reluctant learners who are underachieving and/or showing a poor attitude to learning
- Small group tuition sessions, particularly in Maths and English
- Using 6<sup>th</sup> form helpers in lessons to motivate pupils
- A staff mentoring scheme where pupils are allocated to a key member of staff who oversee their progress both academically and in terms of their attitude to learning.

#### Pupil Premium Funding & Spending

The pupil premium funding is spent in a variety of ways, including investment in both academic and pastoral initiatives. The total funding received for 2013-2015 is shown below:

Funding Stream	2013-14	2014-15
Pupil Premium Allocation	290,700	296,465
Looked After Children Grant	3,300	9,500
Pupil Premium Summer School	15,000	14,800
Total Income per year	309,000	320,765

A breakdown of the projected expenditure for the year 2014-15 is shown below:

<b>Improvement Initiative</b>	<b>Amount (£)</b>	<b>Description</b>
<b>Improving Numeracy and Literacy</b>		
Accelerated reader	2000	Pupil Premium pupils took part in the Accelerated Reader scheme across Key Stage 3. This scheme is designed to improve reading and comprehension as measured by an increase in a pupils' reading age.
Reading Matters	1000	Reading Matters is a 10 week programme where trained volunteers work with pupils, highlighted by the school, who struggle with literacy/reading.
T&L Literacy/numeracy coordinator	5000	A School literacy and a School numeracy coordinator have been appointed in order to prioritise both numeracy and literacy across the whole curriculum. A key focus is to ensure that numeracy and literacy is embedded into the teaching of all departments and is delivered consistently. All pupils are intended to benefit from this along with those who are PP.
Year 11 English Intervention sessions	2000	A series of intervention sessions were conducted in advance of the November examinations, including taking pupils off timetable for a day to work with the English Department.
<b>Improving Academic outcomes</b>		
Appointment of Deputy Headteacher (Pupil Achievement)	12500	A Deputy Headteacher has been appointed with specific responsibility for pupil tracking and achievement for all groups of pupils including those in receipt of PP.
Assistant Headteacher appointment	15000	An additional Assistant Headteacher has been appointed to oversee the Pupil Premium Provision and to ensure outcomes for these pupils are maximised.



Off-site provision	68105	Educational provision not provided at Roundhay School for pupil premium pupils who are off-site for part of their education e.g. 1 day at college.
Small group intervention	5000	Pupils are selected for small group intervention in Maths and English if they are not reaching their target grade. The length of the intervention depends on individual need.
Extra Maths set	5000	Pupils are selected for small group intervention in Maths and English if they are not reaching their target grade. The length of the intervention depends on individual need.
Year 11 Challenge	7000	An extra Maths group in Year 11 has been created in order to ensure that pupils can get more focussed intervention within lessons.
1/2 term study support	5000	The Year 11 Challenge is a programme designed to help pupils at risk of underachieving. The challenge focuses on 40 pupils and offers them a bespoke programme to ensure they achieve in line with their potential. It involves pupils completing a series of tasks to help with their academic studies as well as other interventions such as Master classes and help with revision techniques.
Extra teaching group in Years 7, 8 & 9	45000	Revision sessions and coursework catch up take place in school holidays to ensure that all pupils have every opportunity to succeed.
Extra set in English, Maths and Science in Key Stage 4	30000	An extra teaching group has been created in years 7, 8 and 9. This was done in order to reduce class sizes and therefore make teaching and learning more effective by allowing teachers to tailor lessons to the needs of all learners more effectively.
Data team support	15000	3 people employed (2 part time, 1 full time) to collect analyse and track data across all year groups.

<b>Pastoral and whole-pupil support</b>		
Attendance Officer	20000	A pupil's attendance is a key indicator of future success. We employ 1 full time Attendance Officer who also gets administrative support.
Key Stage 3&4 Mentors	31000	Learning Mentors are employed who work closely with pupils in Key Stage 3 and 4. This involves both academic and pastoral mentoring.
Year 8 Residential	11000	Year 8 week long residential which is attended by most year 8 pupils. Pupil Premium pupils are helped with the expense of the trip.
Leeds Ahead	4000	Programme which helps raise pupils' aspirations and attainment through work related learning.
Realising Potential Project & Personal Finance	3500	Course for targeted pupils which looks at raising self-esteem and aspirations with the ultimate aim of improving final outcomes.
Pupil support (including trips)	7000	Money spent supporting pupils with purchasing uniform, equipment, textbooks and other essentials.
Pupil Premium Summer School	14800	The summer school was run for Pupil Premium pupils who were going to be new to Roundhay school. The summer school lasted for 2 weeks and was attended by 15 pupils.
6th Form transition tutor	6000	The transition tutor works with pupils to prepare them for the different challenges they will face in 6th form as compared to key stage 4.
Careers advice/service	6000	Money spent ensuring that pupil premium pupils make appropriate choices and are offered good advice concerning their future.
<b>Total</b>	<b>320905</b>	

### Funding Focus – Primary Campus

The focus for the use of pupil premium funding at the primary campus is in four main areas. The first three have been identified as the greatest barrier to children's learning with PSED, speech and language and reading being well below age-related expectations on entry to Reception.

By employing consultants who can provide expertise in those specific areas, allows us to target individuals with the greatest impact. Additional support is provided by a Higher Level Teaching Assistant who is able to work with parents, children and provide in-class support to a wide range of pupil premium pupils throughout the school day.

<b>Improvement Initiative</b>	<b>Amount (£)</b>	<b>Description</b>
Play Therapy	11000	A trained play therapist is employed for two days a week to work with individual pupils, groups of pupils and parents. Staff also receive regular advice, support and training on supporting children's personal, social and emotional needs.
Speech & Language Therapy	6000	A speech and language therapist is employed to work with individuals, staff and parents for one day each week for 26 weeks of the year
Reading Recovery Teaching	4000	An experienced reading recovery teacher is employed from November to April to work one day a week with Year 1 Pupil Premium children who need to catch up with their peers. This teacher also provides support and advice for parents and staff and training for staff early reading and writing.
Higher Level Teaching Assistant	9000	An experienced HLTA works part time throughout Reception and Key Stage 1, carrying out interventions and providing in-class support for pupil premium children.

The total spending across both the primary and secondary campus is therefore £350,905.

Attendance

Roundhay recognise that for pupils to succeed, attendance is critical. Improving and maintaining attendance has therefore become a fundamental part of improving standards.

Pupils who fall below the government minimum attendance requirement (92%) are identified and monitored by the school attendance officer. In 2013/2014, 50 of the pupils who fell into this category were Pupil Premium students. The most recent National Attendance figure for all pupils in secondary education was 95.6%, a figure which was equalled or exceeded by Pupil Premium pupils at Roundhay Secondary campus across 4 out of 5 year groups. Similarly, in primary education the national attendance figure for all pupils was 95.3%. This figure was exceeded by pupil premium pupils in year 1 last year.

Attainment & Progress

Within the primary campus the number of pupil premium pupils in each year group is relatively small and therefore year-on-year comparisons can be difficult as 1 or 2 pupils can have a significant impact on the data. However, it is still vitally important to track and monitor the pupil premium group so that underachievement can be tackled. All pupils who are highlighted as not meeting age-related expectations in any of the prime areas will receive support and intervention in order to improve in the specific area of underachievement. These interventions are closely monitored by both the classroom teacher and the leadership group to ensure that they are effective and further interventions continue to take place when necessary.

End of EYFS:	<b>2013</b>	<b>2014</b>
GLD – All pupils	85	73
GLD – Pupil Premium	80	50
Attainment Gap	-5	-23
National Attainment Gap	-19	?

Cohort 2013/2014:

- 8 pupils (13%)
- 50% of the pupil premium children were at age-related expectations or above in all of the prime areas and literacy and mathematics (GLD).

Cohort 2012/2013:

- 5 pupils (8%)
- 80% of the pupil premium children were working at age-related expectations or above in all of the prime areas and literacy and mathematics (GLD).

## Year 1 – Phonics Screening:

Subject	2011	2012	2013	2014
%5A*-C (inc Maths and English)	-37	-30	-14	-28
%EBacc	-10	-27	-21	-22
% Exp. Progress in English	-10	-10	-3	-8
% Exp. Progress in Maths	-41	-15	-8	-26

## Cohort 2012/2013:

- 5 pupils (8%)
- In phonics, 4 pupil premium children (80%) met the required standard in the Y1 phonics screening check. This is in line with performance for the whole cohort (78%).
- All pupils are currently on track to be at age-related expectations at the end of Key Stage 1 in reading and maths. For pupils who are currently not on track to meet age related expectations in writing, several key interventions are being used to improve performance. The impacts of these interventions will be closely monitored for all pupils and further interventions will be employed where required.

	2013	2014
All pupils	n/a	78
Pupil Premium	n/a	80
Attainment Gap	n/a	+2

## Key Stage 4:

Governmental policy changes made in September 2013 mean that only a pupil's first entry for any qualification will count in a school's published data. Therefore making direct comparisons in absolute attainment with previous years can be difficult and misleading. However, the gap between the attainment of pupil premium pupils and non-pupil premium pupils is still a valid measure. The table below summarises how the gap between pupil premium pupils and non-pupil premium pupils has changed over the past 4 years across a series of important measures.

The gaps across all key measures have generally narrowed over the past 4 years. Between 2013 and 2014 the gap has widened for 3 of the key measures, but in all 3 cases the gap in 2014 is smaller than it was in 2011 when the comparison began. The only exception to this is the gap for the EBacc measure which was very small in 2011. Whilst the gap is bigger in 2014 than in 2011 the general trend over the past 3 years shows an overall improvement and in fact a greater proportion of pupils achieved the EBacc in 2014 than in 2011 (23% in 2014, 19% in 2011). The figure in 2014 also means that pupil premium pupils at Roundhay School are only 4% below non-pupil premium pupils nationally (based on 2013 figures).

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## WOODTHORPE PRIMARY SCHOOL

## PUPIL PREMIUM EXPENDITURE REPORT TO GOVERNORS

## AUTUMN TERM 2014

(Progress reported September 2013 – July 2014)

### What is Pupil Premium?

The Pupil Premium Grant (PPG) gives schools extra funding to raise the attainment of disadvantaged pupils from Reception to Year 11.

It was introduced in April 2011 to give schools £400 per year for:

- every child currently registered as eligible for free school meals, referred to as *FSM*
- children who have been looked after for 6 months or longer, referred to as *CLA*

#### Funding for 2012 to 2013

From April 2012, pupil premium funding was also extended to:

- all children eligible for free school meals (FSM) at any point in the past 6 years, referred to as *Ever 6*.

#### Funding for 2013 to 2014

In the 2013 to 2014 financial year, funding for the pupil premium increased to £900 per pupil.

All pupils in primary schools also attract an additional £53. This means that schools got a total of £953 for each primary school pupil premium pupil in the 2013 to 2014 financial year.

#### Funding for 2014 to 2015

In the 2014 to 2015 financial year, schools will receive the following funding for each child registered as eligible for free school meals at any point in the last 6 years:

- £1,300 for primary-aged pupils

Schools will also receive £1,900 for each looked-after pupil who:

- has been looked after for 1 day or more or
- was adopted from care on or after 30 December 2005, or left care under a special guardianship order or a residence order

Woodthorpe total number of pupils on roll (July 2014)	<b>404</b>
<b>Woodthorpe total amount of PPG received in 2013 – 2014 financial year</b>	<b>£104,618</b>
Woodthorpe number of pupils eligible for PPG January 2014	<b>83</b>
Woodthorpe amount of PPG received per pupil April 2014 (based on January '14 census)	<b>£136,900</b>



**Accountability****Annex D**

At Woodthorpe Primary School, we have high aspirations and ambitions for our children and we believe that no child should be left behind. We strongly believe that it is not about where you come from but your passion and thirst for knowledge, and your dedication and commitment to learning that make the difference between success and failure, and we are determined to ensure that our children are given every chance to realise their full potential. Pupil premium funding represents a significant proportion of our budget and this policy outlines how we will ensure it is spent to maximum effect. Pupil premium is paid to schools as they are best placed to assess what additional provision their pupils need.

Ofsted inspections report on how schools' use of the funding affects the attainment of their disadvantaged pupils.

Schools are also held to account through performance tables, which include data on:

- the attainment of the pupils who attract the funding
- the progress made by these pupils
- the gap in attainment between disadvantaged pupils and their peers

**The Objectives of Pupil Premium spending 2013/2014**

The Governors and teaching team are continually targeting PPG with the aim of:

Using the Pupil Premium Grant to **narrow and close the gap between pupil groups**. As a school we have a track record of ensuring that vulnerable groups of pupils make better progress than other group comparators. When making decisions about using pupil premium funding we believe it is important to consider the context of the school and the subsequent challenges faced. Common barriers for some of our FSM children can be less support at home, weak language and communication skills, lack of confidence, more frequent behaviour difficulties, and attendance and punctuality issues. There may also be complex family situations that prevent children from flourishing. The challenges are varied and there is no "one size fits all". We look at our children's specific needs and design our programmes around them.

A significant amount of additional funding has been allocated to the school and we are determined to ensure that it has maximum impact. Careful analysis of internal and external pupil-level data, historical attainment and progress rates, and a huge amount of qualitative data was undertaken to ensure that these funds are used to maximum effect. Our robust self-evaluation procedures have guided us in deciding where and how to spend our pupil premium allocation.

We have also used existing researches and publications including those from the OFSTED Good Practice series, and The Pupil Premium: How schools are spending the funding successfully to maximise achievement as well as findings of studies undertaken by the SUTTON TRUST to enable us to make decisions relating to provisions.

We have invested heavily in ensuring that the success of our phonics programme is sustained by ensuring 100% of our staff (teachers and support staff) receive comprehensive training, and that resources and materials are updated and reviewed regularly. We also secured high quality and additional personnel time to implement key interventions to maximise progress.

We have sought enhanced provision through external organisations and identified opportunities for children to have an enriched experience of the curriculum. Problem solving projects in mathematics, artistic and musical provision and sporting experiences are just a few of the curriculum enrichment areas we focused on this year.

We are delighted with our Key Stage 2 results which show that the school is going from strength to strength. The results reflect the hard work of staff, excellent partnership working with parents and a determination to ensure that EVERY child succeeds. Our key objective in using the Pupil Premium Grant is to narrow the gap between pupil groups. As a school we have a good track record of ensuring that pupil premium pupils make good progress, but

historically levels of attainment are lower for FSM– this is also a national trend.

Through expanding targeted interventions we are working to eliminate barriers to learning and progress. An increasing and significant percentage of our children start school with attainment lower than the national average on entry and our aim is to ensure that they make accelerated progress in order to reach age related expectations and as they move through the school.

Targeted support is being provided through a variety of ways, as detailed below. These interventions support children in knowing where they are and what they need to do to improve their work. Increasing parental engagement has been a major focus. The school has introduced additional half termly parent teacher meetings to identify ways forward for supporting children at home. We share targets and ways forward to ensure we are working together for children who would benefit from a boost to get them back on track or who would benefit from support to accelerate progress to higher levels of attainment. At parents evenings we share their child's level and discuss what interventions children are partaking in and what their targets are. Targets are also at the front of core subjects books which are shared during termly open afternoons. There has also been a range of family learning opportunities on offer to help parents develop their own skills in English and maths.

In addition to this we have identified some key principles (outlined below) which we believe will maximise the impact of our pupil premium spending.

### **Key Principles**

#### ***Building Belief***

We will provide a culture where:

- staff believe in ALL children
- there are “no excuses” made for underperformance
- staff adopt a “solution-focused” approach to overcoming barriers
- staff support children to develop “growth” mindsets towards learning

#### ***Analysing Data***

We will ensure that:

- All staff are involved in the analysis of data so that they are fully aware of strengths and weaknesses across the school in addition to their individual classes
- We use research, best practice guidance and the knowledge of our children to support us in determining the strategies that will be most effective

#### ***Identification of Pupils***

We will ensure that:

- ALL staff are involved in analysis of data and identification of pupils
- ALL staff are aware of who pupil premium and vulnerable children are
- ALL pupil premium children benefit from the funding, not just those who are underperforming
- Underachievement at all levels is targeted (not just lower attaining pupils)
- Children's individual needs are considered carefully so that we provide support for those children who could be doing “even better if....”

#### ***Improving Day to Day Teaching***

We will continue to ensure that **all** children across the school receive good teaching, with increasing percentages of good teaching achieved by using our team leaders to:

- Set high expectations
- Address any within-school variance
- Ensure consistent implementation of the non-negotiables e.g. marking and guided reading
- Share good practice within the school and draw on external expertise
- Provide high quality C.P.D. (Continuing Professional Development)
- Improve assessment through joint levelling and moderation both within school and through the West Partnership of schools.

#### ***Increasing Learning Time***

We will maximise the time children have to “catch up” through:

- Improving attendance and punctuality through actively supporting families

- Providing earlier intervention (KS1 and EYFS)
- Extended learning out of school hours
- Early mornings and after school support including Homework Club

### **Individualising Support**

*“There’s no stigma attached to being in an intervention in this school. Everyone needs something, whatever that might be, and so they’re all getting something somewhere.”*

We will ensure that the additional support we provide is effective by:

- Looking at the individual needs of each child and identifying their barriers to learning
- Ensuring additional support staff and class teachers communicate regularly
- Using outstanding practitioners to provide high quality interventions across their phases
- Matching the skills of the support staff to the interventions they provide and providing high quality training
- Working with other agencies to bring in additional expertise
- ‘Right to Read’ – volunteer readers
- School Home Support
- Providing extensive support for parents through family learning, and dedicated in school high intensity support
- Developing parental skills (Literacy, Managing Money, Phunky Foods, Keeping Up in Maths) to support their children’s learning within the curriculum
- Tailoring interventions to the needs of the child (e.g. Targeted maths revision sessions in the afternoons for children who struggle in the main lesson)
- Recognising and building on children’s strengths to further boost confidence (e.g. providing Emotional Literacy Support)

### **Going the Extra Mile**

In our determination to ensure that ALL children succeed we recognise the need for and are committed to providing completely individualised interventions for set periods of time.

## Pupil Premium and Well-Being and Pastoral Care

We specifically track our pupil premium children in many ways for example:

- Attendance
- Attainment
- Progress
- Emotional and Social support programmes
- Detention
- After School Club uptake (see Sports Premium report)
- Inclusion in enrichment activities

We then respond at an individualised level to ensure each child is supported to fulfil their potential.

We also ensure that we provide 1-1 support for some of our pupil premium children and families to support them both in school and in their wider community.

### Curriculum Focus Impact

As a result of all the support and interventions in each year group (outlined in Appendix One) which are made possible through receiving pupil premium funding we have evidenced (Appendix Two) all the school's achievements, of which there are many, against national standards.

When assessing the impact of teaching and support in school the following guidelines apply to the outcomes shown in the table below:

Key Stage 2 Progress in core subjects:

**3.3** Average point score a year (A.P.S.) which is nationally recognised as **expected** progress.

**3.6+** Average point score a year (A.P.S.) which is nationally recognised as **accelerated** progress.

Target Group	Project	Objective	Outcome
All pupils	Quality First Teaching	Raise attainment of pupil premium children	<p>2014 Year 1 Phonic screening – 83% of Pupil Premium children achieved Working At.</p> <p>2014 The Year 2 cohort comprises of 25% Pupil premium. Of this only 5.76% re-sat the phonics screen of which only 1.92% didn't achieve Working At.</p> <p>Key Stage 1 pupil premium children made:            Reading: <b>6.50 APS</b>            Writing: <b>6.10 APS</b>            Maths: <b>6.20 APS</b></p> <p>Key Stage 2 pupil premium children made:            Maths: <b>3.86 APS</b>            Reading: <b>4.14 APS</b>            Writing: <b>3.85 APS</b></p> <p><b>This represents accelerated progress in both Key Stages and an increase on 2013 and shows that interventions have a positive impact.</b></p>
All	Walking Bus	Ensure children are able to come to school on time	Increase in the number of children using the service. Of those that use the walking bus of whom are Pupil Premium attendance has increased to 96.57% which is outstanding and above the national average.
All	Breakfast Club	Subsidise the service to keep costs low	Children are in school ready and on time.
All	Behaviour Support	Allocate key workers to ensure children are ready to learn	Personalised behaviour provision has been provided to specific pupil premium children and ensured that they are receiving 1-1 support to meet their needs.
All	Emotional Literacy Support	To train staff and provide specific support to facilitate increased engagement in learning	Children are settled and ready to learn and their progress is accelerated. Social, emotional and behaviour does not impact on learning.
All	Children's Champion Teacher	<p>To increase home school support</p> <p>To monitor, address and support attendance at school</p> <p>To increase parental engagement with school</p> <p>To provide individualised support</p>	<p>Attendance:            2.46% of the whole of Woodthorpe School population are Persistent Absentees (P.A.) with 0.7% being pupil premium P.A.</p> <p>Pupil premium children who are persistent absentees (where attendance is 85% and below) are supported through family meetings to improve their attendance.</p> <p>As a result of 1-1 meetings and our proactive approach the % of P.A. children has decreased overall and attendance has improved for PA pupils with the impact of 67% of the 0.7% overall achieving their best attendance over three years.</p> <p><i>NB PA children tend to be ones that are new to the school.</i></p>

**School Priorities and Planned support for Academic Year 2014 - 2015**

Continue to accelerate rates of progress to close attainment gaps, specifically in EYFS upon entry and as pupil premium move through school by means of individual tracking and personalised support.

Provide a speaking and listening intervention to address the increasing need, identified from entry baseline information.

Continue to review and expand the range of intervention opportunities on offer to meet needs and learning styles appropriate to the individual.

Increase the time given to the Assistant SENCO to develop activities and promote parental engagement in school and raise aspirations for disadvantaged families.

Continue to promote family learning opportunities provided in school for parents in key literacy and numeracy skills resulting in increased engagement.

Focus on improving whole school writing.

Increase the % of FSM children making more than expected progress in maths.

Close the gap further so that FSM children match or exceed the performance of Non-FSM children Nationally.

Continue to fund additional support provision using our highest quality teachers to deliver specific end of key stage provisions.

To provide opportunities for all children to access learning through ICT outside of the school day via providing a range of clubs.

Continue to assiduously tackle and improve attendance to close the gap to the National data.

**APPENDIX ONE - Record of Pupil Grant Spending Overview by Initiative**

**Annex D**  
Year 6

<b>Reception</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>	<b>Year 6</b>
Blending and segmenting intervention	Key worker allocation	Rapid Read intervention	Rapid Phonics	Rapid Read	Supporting writing to Level 3	Supporting two levels progress in reading intervention group
Phonic boosting sessions	Time to talk intervention	Rapid Phonics intervention	Rapid Read	Rapid Phonics	Securing Level 4 in writing	Achieving Level 4 writing booster group
Managing Feelings and Behaviour intervention	Rapid Phonics	Time to Talk intervention	Quest literacy intervention	Extending to Level 4 Reading Comprehension support	Improving reading and comprehension	Achieving Level 4 reading booster group
Number recognition and 1-1 correspondence	Additional reading intervention programme	Bug Club	Bug Club	Getting to Level 3 writing intervention	Rapid Phonics Intervention	Gaining high Level 5 reading skills and boost for Level 6
Speech and Language Intervention	Reading and Phonics boost x 2	Spaced Out Maths (violet) intervention	Daily 1-1 Reading individualised support	Daily 1-1 Reading individualised support	Rapid Read	Bug Club
Bug Club	Bug Club	Springboard maths intervention	Monster Maths	Mathletics	Maths Booster	Rapid Phonics Intervention
	Monster Maths Intervention	Monster Maths intervention	E..L.S.A. support	Securing levels intervention	Securing Levels in Maths intervention	Securing solid Level 4a+ and equipping for Level 5 booster
	Numicon personalised support programme	Behaviour support bought in service 1-1	Bought in SEN support services	E.L.S.A. Support	Mathletics	Supporting two levels progress in maths intervention group
	Emotional Literacy Support Assistant(E.L.S.A.) support	E.L.S.A. support	Attendance Management	Socially Speaking intervention	Early bird Mathletics club	Early bird Mathletics club
	Behaviour support bought in service 1-1	Hearing Impaired support	Homework Club	Family Early Help Assessment Support	1-1 Individual Support	E.L.S.A. Support
	Attendance Management	Booster x 3 afternoons	Brainwaves Club provision	1-1 x 13 hours weekly support	Homework Club	Attendance Management
	CAF support		CAF Support	Homework Club		Homework Club
						Managing Behaviour Support
						Supporting residential costs

**Headline Data**

**Overall our children have performed better in 2014 than in previous years.**

**How Do We Compare Nationally?****Context**

The 2013 Raise on Line Report produced for all schools by the DfE stated that Woodthorpe School has 30% of pupils taking FSM this was in comparison to the National of 26.7%.

Please note that the next published set of DfE National results will be Autumn 2014.

**Absence Data**

2013 Absence data for our FSM was 6.5%, 0.2% higher than the National of 6.3%. in 2014 this was reduced to 5.83%.

Persistent Absentees for our FSM was 7.1%, 0.3% higher than the National of 6.8%

In order to tackle this in Sept 2013 we formed an attendance task force comprised of a teacher, a governor and a Local Authority representative. We now produce detailed termly tracking reports to governors. Current tracking indicates that FSM absence is 6.15%. The Local Authority takes a lead where absence does not improve following whole school actions.

**Phonics**

In the Key Stage 1 phonics screening, we continue to exceed the National benchmark of 69% and achieved 82% maintaining our high standards of previous years. This is a result of carefully dissecting our practice and implementing an action plan modelled on the DfE document 'Phonics Screening Check: Responding to the Results'. We have invested heavily in the phonic resources and interventions.

**Year 1 Phonic Screen**

In 2013 77% of FSM pupils achieved the National level at Woodthorpe. This was **20% higher** than the National of 57%.

The school closed the gap between FSM and Non-FSM from a 24% gap in 2012 to a 5% gap in 2013, this gap continues to be positively addressed with a high % of pupils meeting the required standard in 2014.

**Year 2 Phonic Screen**

In 2013 79% of FSM pupils (Free School Meals) achieved the National level at Woodthorpe. This was **17% higher** than the National of 62%.

**Attainment at Key Stage 1**

2012 saw the attainment gap closing between FSM and their National counterparts but widening again in 2013 due to a cohort that had come in well-below national expectations overall . In 2014 we sought to close that gap completely with the impact of successfully having closed the gap with 0.6 APS increase on 2013 National Data in Reading, 0.8 APS increase on 2013 National Data in Writing and 0.3 APS increase on 2013 National Data in Mathematics. This has resulted in closing the gap between our FSM children and National data for Non-FSM children as follows:

2013 Reading 3.8 APS gap

2014 Reading 1.4 APS gap

2013 Writing 3.8 APS gap

2014 Writing 1.2 APS gap

2013 Maths 3.6 APS gap

2014 Maths 1.4 APS gap

This represents a positive impact on pupil premium children.



**Achievement at Key Stage 2 at Level 4+ in Reading, Writing and Maths****Annex D**

Since 2011 the school has continued to close the gap between FSM and Non-FSM within school, with an increase in the % of pupil premium children attaining Level 4+ in Reading, Writing and Maths.

Our pupils matched the National data in Attainment Average Point Scores (APS) in Mathematics, Reading and Writing (Teacher Assessment) combined at 26.7 APS.

In Mathematics we exceeded the FSM National Data set at 27.4 APS compared with 27.0 APS. We expect our APS for FSM children in 2014 to be 27.5 APS.

In Reading we were slightly below the FSM National Data set at 26.2 APS compared with 26.9 APS. We expect our FSM children in 2014 to be 28.0 APS.

In Writing we were in line with the FSM National Data set at 25.8 APS compared with 25.9 APS. We expect our FSM children in 2014 to be 25.5 APS.

As a result we will continue to tackle these key areas in 2014 – 2015 targets through a focus on writing as well as weekly comprehension, Rapid Phonics, Rapid Read and 1-1 interventions.

Our next target is to close the gap further and our FSM children to match or exceed the performance of Non-FSM children Nationally.

Our FSM children at the end of Key Stage 2 in 2014 did not achieve in line with their counterparts nationally at Level 4 however they made expected or better progress than their National Counterparts in Key Stage 2 from their well below nationally expected starting points in Literacy. The number of children in this group is very low and as a result each child represents a high % therefore we have to treat the comparison against national data with caution, as it can distort/mislead/misrepresent the performance figures. This data should be read in conjunction with the 'Progress since Key Stage 1' information below. Please note that some of our children did not achieve Level 4, the nationally expected level because their starting point was lower (i.e. Below Level 2) than the nationally expected level (i.e. Level 2B and above). However they made the same progress or better than their counterparts nationally.

**Progress Since Key Stage 1****Headlines**

Overall in 2012/13, pupils in receipt of PPG made better average rates of progress than pupils not in receipt of PPG.

**Progress**

Reading expected progress in 2013 - From Key Stage 1 93% of FSM children outperformed the National data set by 4%.

Reading more than expected progress in 2013 - From Key Stage 1 29% of FSM children matched the National data set at 29%. In 2014 Woodthorpe School will achieve 50% of FSM pupils making more than expected progress.

Writing expected progress in 2013 - From Key Stage 1 100% of FSM children outperformed the National data set by 7%.

Writing more than expected progress in 2013 - From Key Stage 1 7% of FSM children made well below the National data set at 31%. This is an area we targeted in 2014 and the impact has been 42% of children made more than expected progress.

Maths expected progress in 2013 - From Key Stage 1 86% of FSM children were only 4% below the National data set.

Maths more than expected progress in 2013 - From Key Stage 1 21% of FSM children made below the National data set at 34%. Mathematics is an area we need to target in 2014-2015.

Our **Key Stage 1 to Key Stage 2 Value Added Summary** shows that our **FSM outperform our non-FSM children** in Mathematics, Reading and Writing **as well as closing the gap** to the National Data Set year on year. **Annex D**

Our **Key Stage 1 to Key Stage 2 Expected Progress Reading, Writing, Mathematics** shows:

Mathematics - our FSM **outperform their National counterparts** by 2% at 86% compared with 84% Nationally.

Reading - our FSM **outperform their National counterparts** by 9% at 93% compared with 84% Nationally.

Writing - our FSM **outperform their National counterparts** by 11% at 100% compared with 89% Nationally.

### **In Year School Progress Data**

#### **EYFS**

In 2013 Pupil premium children in EYFS only made up 4% of the cohort. Assessments were made against a new EYFS framework, these cannot be compared to the previous year. We are addressing low attainment in Speaking and Listening by developing the use of a range of interventions increasing the opportunities that pupils have to develop their skills.

In 2014 Pupil premium children in EYFS made up 12.5% of the cohort.

In Personal, Social, Emotional Development 67% made expected levels of development.

In Reading, Writing and Mathematics 50% made expected levels of development.

Of those children that did not make expected progress there were extenuating circumstances which will have contributed to the outcomes.

#### **Key Stage 2**

The proportion of Pupil Premium pupils making expected or better progress over the academic year in Reading, Writing and Maths has increased significantly:

In reading 97% of pupil premium pupils made expected or better progress in 2014.

In writing 92% of pupil premium pupils made expected or better progress in 2014.

In maths 89% of pupil premium pupils made expected or better progress in 2014.

Many pupils who received support from an additional teacher made outstanding progress.

**NEW EARSWICK PRIMARY SCHOOL**  
**Pupil Premium – Impact and Spend Summary**

Annex E

Total fund generated via Pupil Premium for 2013/14 **£58,133**

<b>Key Actions</b>	<b>Examples of Impact 2014</b>	<b>Cost 2013-14</b>
PRE-TEACHING	<ul style="list-style-type: none"> <li>Better than expected progress in writing for five Y3 pupils (see Case Study 34).</li> <li>Improved independence, confidence and engagement with maths (see Case Studies 31, 32 &amp; 33).</li> </ul>	£22,378+
1:1 TUITION	<ul style="list-style-type: none"> <li>Where the focus was on READING, 1 out of 2 pupils made at least expected progress from Y2-Y6.</li> <li>Where the focus was on WRITING, 3 out of 4 pupils made at least expected progress from Y2-Y6.</li> <li>Where the focus was on MATHS, 6 out of 7 pupils made at least expected progress from Y2-Y6.</li> </ul>	£8,439
1:1 LEARNING SUPPORT & SPECIALIST SEN TEACHING <i>Note: outcomes affected by high mobility/nature of SEND</i>	<p><u>READING</u></p> <ul style="list-style-type: none"> <li>2 out of 8 Y6 SEN pupils made better than expected progress from Y2-Y6. 2 made expected progress and 4 made less than expected progress.</li> </ul> <p><u>WRITING</u></p> <ul style="list-style-type: none"> <li>2 out of 8 Y6 SEN pupils made better than expected progress from Y2-Y6. 5 made expected progress and 1 made less than expected progress.</li> </ul> <p><u>MATHS</u></p> <ul style="list-style-type: none"> <li>5 out of 8 Y6 SEN pupils made expected progress and 3 made less than expected progress.</li> </ul>	£7,696 £5,337
1:1 BEHAVIOUR SUPPORT (14 hpw)	This pupil did not achieve a good level of development at the end of the EYFS but went on to achieve a L2B in reading and maths and a secure L2C in writing.	£4,350
PHONIC INTERVENTION	The attainment of 2013/14 Y1 cohort was similar to the national average at the end of the EYFS (53% GLD). Concerns were identified in early 2014 and intervention put in place. With 80% 'at standard', attainment looks set to be above the national figure.	£2,000
EYFS SLCN	Records show positive impact.	£7,420
CURRICULUM ENRICHMENT	Activities including Indian Dance & African Drumming supported children's knowledge & understanding of other cultures and provided stimuli for learning.	£1,350
PARENT SUPPORT WORKER	Records show a number of families and pupils have been well supported to maximise engagement with school and learning.	N/A
PASTORAL PUPIL SUPPORT	Records show that many pupils developed better coping strategies and improved self-esteem.	N/A
WELL BEING WEEKS & ASSEMBLIES	Evaluation books show that many pupils have developed increased stamina and will power. They also improved their learning behaviour and team working skills.	N/A
YOUNG ENTERPRISE	Pupils' aspirations are being developed through this programme.	N/A
MENTORING	This has provided pupils with an 'interested adult' to give support and encouragement.	N/A
<b>TOTAL</b>		<b>£58,970</b>
<b>Commentary :</b>		
<ul style="list-style-type: none"> <li>EYFS PPG pupils attained at least as highly as their non-PPG peers in 2014 (GLD).</li> <li>Y1 PPG pupil made very good progress in phonics, where 100% were 'at standard' in 2014.</li> <li>Y2 PPG pupils generally made at least expected, and in many cases better, progress from their starting</li> </ul>		

points than their non-PPG peers.

- In Y6 in 2014, PPG pupils performance was as follows:
  - 1 made 3 levels of progress, 5 made two levels of progress and 1 made 0 levels of progress in reading;
  - All 8 made two levels of progress in writing;
  - 1 made 3 levels of progress, 5 made two levels of progress, 1 made 1 level of progress and 1 made 0 levels of progress in maths;
  - 4 of the group attained L4+ in maths plus reading plus writing (one highly mobile pupil did not get L4 in anything, two pupils missed L4 in maths and one pupil missed it in reading).

Caution should however be exercised when interpreting all data, as the school groups involved vary in size but are generally very small, which leads to statistical distortion when making year on year comparisons and when making comparisons to national data.

**Recommendations:**

- Continue to focus on PPG pupils, tracking their progress and attainment carefully through day to day monitoring systems including 'on track' meetings, observations, work & planning scrutinies etc.
- Ensure this group of pupils receive all necessary intervention and support to ensure that all those with the capability to reach age-related expectations do so.
- Implement pre-teaching across the school, with a particular focus on PPG pupils

**NEW EARSWICK PRIMARY SCHOOL**  
**Pupil Premium – Impact Over Time**

Annex E

## Percentage achieving a good level of development in Early Years

	2011	2012*	2013**	2014
% FSM	17%	75%	60%	75%
% Non-FSM	65%	91%	52%	73%
% Gap	-48%	+16%	+8%	+2%

## Percentage achieving level 2B+ in Reading

	2011	2012*	2013	2014
% FSM	50%	43%	67%	100%
% Non-FSM	63%	68%	89%	91%
% Gap	-13%	-25%	-22%	+9%

## Percentage achieving level 2B+ in Writing

	2011	2012*	2013	2014
% FSM	25%	43%	33%	100%
% Non-FSM	47%	64%	79%	73%
% Gap	-22%	-21%	-46%	+27%

## Percentage achieving level 2B+ in Mathematics

	2011	2012*	2013	2014
% FSM	50%	43%	33%	100%
% Non-FSM	58%	68%	95%	91%
% Gap	-8%	-25%	-62%	+9%

## Average point score in KS1 (All core subjects)

	2011	2012*	2013	2014
% FSM	13.9	12.3	14.1	17.0
% Non-FSM	13.8	15.2	16.8	16.9
% Gap	+0.1	-2.9	-2.7	+0.1

## Percentage achieving level 4 in combined English and Mathematics in KS2

	2011	2012*	2013 (Re/Wr/Ma)	2014 (Re/Wr/Ma)
% FSM	67%	40%	60%	57%
% Non-FSM	59%	86%	82%	71%
% Gap	+8%	-46%	-22%	-13%

## Percentage achieving two levels of progress in English

	2011	2012*	2013: Reading	2013: Writing	2014: Reading	2014: Writing
% FSM	89%	100%	80%	100%	71%	100%
% Non-FSM	77%	86%	81%	88%	82%	94%
% Gap	+12%	+14%	-1%	+12%	-11%	+6%

## Percentage achieving two levels of progress in Mathematics

	2011	2012*	2013	2014
% FSM	78%	80%	60%	71%
% Non-FSM	77%	100%	88%	88%
% Gap	+1%	-20%	-28%	-17%

*\*First full year of PP \*\*EYFS Profile changed*

**Summary Comparison to National**

Annex E

	<b>School FSM 2013</b>	<b>National FSM 2013</b>	<b>School NON FSM 2013</b>	<b>National NON FSM 2013</b>	<b>School FSM 2014</b>	<b>National FSM 2014</b>	<b>School NON FSM 2014</b>	<b>National NON FSM 2014</b>
Early Years GLD*	60%	36%	52%	55%	75%	tba	73%	tba
KS1 Average points	14.1	-	16.8	-	17.0	-	16.9	-
Reading Level 4+	60%	75%	82%	88%	71%	tba	82%	tba
Writing Level 4+	80%	70%	88%	86%	86%	tba	88%	tba
Maths Level 4+	60%	74%	88%	87%	71%	tba	76%	tba
Rea, Wri & Maths L4+	60%	60%	82%	79%	57%	tba	71%	tba
Average point score (All)	25.8	tba	28.1	tba	26.1	tba	27.4	tba
2 Levels Progress Rea	80%	83%	81%	89%	71%	tba	82%	tba
2 Levels Progress Wri	100%	88%	88%	92%	100%	tba	94%	tba
2 Levels Progress Maths	60%	83%	88%	89%	71%	tba	88%	tba

**NEW EARSWICK PRIMARY SCHOOL**  
**Pupil Premium – 2014-15 Spending Plan**

Total fund generated via Pupil Premium for 2014/15: **£79,300**

<b>Key Actions</b>	<b>Examples of Impact 2015</b>	<b>Cost 2014-15</b>
PUPIL PREMIUM CHAMPIONS		£5,050
PRE-TEACHING & CLASSROOM INTERVENTION DELIVERED BY TAS		£8,320 (ME x 16) £15,600 (LBr x 30) £14,347 (LBU x 20)
1:1 TUITION		£10,358
1:1 LEARNING SUPPORT		£8,608 (JH)
SPECIALIST SEN TEACHING		£5,179
1:1 BEHAVIOUR SUPPORT		£7,800 (ME x 15)
EARLY YEARS SLCN		£10,341 (LR x 10, MC x 5)
CURRICULUM ENRICHMENT		N/A
PARENT SUPPORT WORKER		N/A
CHILL OUT LEADER & PASTORAL SUPPORT		N/A
WELL BEING WEEKS & ASSEMBLIES		N/A
YOUNG ENTERPRISE		N/A
MENTORING		N/A
<b>TOTAL</b>		<b>£85,603</b>



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Primary School	No of staff attended	Additional training/support required	Q2. Went well/useful?	Q3. Anything else to be included?	Q4. What will you do as a result?	Key Stage 1		Key Stage 2	
						No. of FSM Pupils	One of worst performing over 3 years for....	No. of FSM Pupils	One of worst performing over 3 years
Acomb Primary						Fewer than 5	Writing at L2b+		
Archbishop of York's CE Junior	2		The time to meet, learn, listen, discuss and improve. Chance to start writing action plan for PP children. Case studies from Tracey and Trevor. Clear messages / information from John - largely consolidating information we know and are acting on.		Action plan created. Working on this and moving in a way that ensures we make significant progress and close gaps. Tracker update including barriers / intervention for staff in meeting already planned.				
Badger Hill Primary						Fewer than 5	Reading & Mathematics at L2b+		
Bishopthorpe Infant	2	PP support / ideas for EYFS	Information on new expectations and best practice		Disuss with SLT how we can improve our PP provision				
Burton Green Primary	2		Guidance for prioritising the way forward		Put together an action plan with senior management	More than 5	Reading & Writing at L2b+		
Carr Infant	1	Development of PP co-ordinator network. Support for governors.	Looking closely at devising a school action plan. Up to date Ofsted requirements. Talk from HMI.	Developing a 'network' and the opportunity to leave today with that beginning	Feedback to wider SLT and Governors. Evaluate current action plan with the one started today. Share information.	More than 5	Reading & Mathematics at L2b+		
Carr Junior	2							More than 5	Reading, Writing & Mathematics at L4+
Clifton Green Primary	1								
Clifton with Rawcliffe Primary	2	Pupil premium support group/network	Time to reflect - hear national perspective. Great overview and excellent practical solutions / suggestions by Sir John Dunford.		Re-examine current PP provision and action plan.	Fewer than 5	Reading & Writing at L2b+		
Copmanthorpe Primary									
Dringhouses Primary	1								
Dunnington CE Primary									
Elvington CE Primary									
Fishergate Primary									
Haxby Road Primary Academy	2		Ideas for how to implement what we need to - very useful. Highlighted the importance.		Improve our pupil premium audit trail at school by having SLT meeting			More than 5	Writing at L4+
Headlands Primary									
Hempland Primary	1								
Heworth CE Primary									
Hob Moor Primary	4	PP network in York - good idea and chance to share ideas.	John's presentations and sharing experiences. Millthorpe school ideas and practice.		Time to plan strategy and review individual progress.				
Huntington Primary	2					Fewer than 5	Writing at L2b+		
Knavesmire Primary						Fewer than 5	Reading, Writing & Mathematics at L2b+		

Primary School	No of staff attended	Additional training/support required	Q2. Went well/useful?	Q3. Anything else to be included?	Q4. What will you do as a result?	Key Stage 1		Key Stage 2	
						No. of FSM Pupils	One of worst performing over 3 years for....	No. of FSM Pupils	One of worst performing over 3 years
Lakeside Primary	2		All sessions were really useful - 'excellence and equity' will be our driver for all		Continue with our determined approach to tackle the actions highlighted in our PP review, equipped with some new ideas.			More than 5	Reading at L4+
Lord Deramore's Primary	1								
Naburn CE Primary									
New Earswick Primary	1								
Osbalwick Primary	2							More than 5	Reading & Writing at L4+
Our Lady Queen of Martyrs						More than 5	Reading, Writing & Mathematics at L2b+		
Park Grove Primary	1								
Poppleton Ousebank	1	Link with others regarding PP	Presentations were excellent - informative and compelling		Lots - contact Head				
Poppleton Road Primary	2								
Ralph Butterfield Primary						Fewer than 5	Mathematics at L2b+		
Robert Wilkinson Primary Academy									
Rufforth Primary									
Scarcroft Primary	1					More than 5	Reading, Writing & Mathematics at L2b+		
Skelton Primary									
St Aelred's RC Primary									
St Barnabas' CE Primary	2		John Dunford - great to be prompted to think about strategies / barriers and what we can actually do about it, rather than the 'you need to improve' message.		Plan in better evaluation of our strategies - we do lots of different approaches but we aren't always sure how effective they are.	More than 5	Writing & Mathematics at L2b+		
St George's RC Primary	2					Fewer than 5	Writing & Mathematics at L2b+		
St Lawrence's CE Primary									
St Mary's CE Primary									
St Oswald's CE Primary	2		Morning sessions from John Dunford especially useful and Trevor Burton		Formulate action plan for PP. Review of effectiveness of current strategies. Ensure all staff are involved.				
St Paul's CE Primary						Fewer than 5	Reading & Mathematics at L2b+		
St Paul's Nursery									

Primary School	No of staff attended	Additional training/support required	Q2. Went well/useful?	Q3. Anything else to be included?	Q4. What will you do as a result?	Key Stage 1		Key Stage 2	
						No. of FSM Pupils	One of worst performing over 3 years for....	No. of FSM Pupils	One of worst performing over 3 years
St Wilfrid's RC Primary	1								
Stockton-on-the-Forest									
Tang Hall Primary	1					More than 5	Reading, Writing & Mathematics at L2b+	More than 5	Reading & Mathematics at L4+
Westfield Primary	1					More than 5	Writing at L2b+	More than 5	Reading & Writing at L4+
Wheldrake CE Primary									
Wigginton Primary	1					More than 5	Mathematics at L2b+		
Woodthorpe Primary	4							More than 5	Mathematics at L4+
Yearsley Grove Primary	1								
Applefields									
Danesgate Community	1								
Hob Moor Oaks	1								
Secondary School	No of staff attended	Additional training/support	Q2. Went well/useful?	Q3. Anything else to be included?	Q4. What will you do as a result?	5+ A*-C including English & Maths			
Archbishop Holgates CE Academy	1		Content - really good and thought provoking		I have a plan in place	-41%			
All Saints RC School	2		John and Gina both gave perspectives that made us think about our school	More suggestions about curriculum developments	Continuing to review and develop what we offer. More training for staff in school via T+L meetings	-9% (showing a positive trend)			
Canon Lee School	1					-43%			
Fulford School	1		Case study from Westfield school. Overview of PP and it is the leadership challenge. The way data was mentioned and possible gaps to consider (eg PP against non-PP nationally)	More opportunity to debate in-school vs external factors and what schools can and should do about wider community / family issues.	Report to Gov body and raise at next GB meeting. A long list of 'to-do's' including further analysis of data, more reasearch into existing practice and an action plan (to include learning walks and student voice)	-23%			
Huntington School	2		Always useful to talk to colleagues and share good practice.	More case studies?	Share with SLT and colleagues and governors	1% (Showing a positive trend)			
Joseph Rowntree School	1					-29%			
Manor CE Academy						-44%			
Millthorpe School	1					-13% (Showing a positive trend)			
York High School	2					-24%			

Anonymous evaluations	Additional training/support required	Q2. Went well/useful?	Q3. Anything else to be included?	Q4. What will you do as a result?			
Anon 1		All of it!					
Anon 2		John's message		Just keep going with raising achievement and equity			
Anon 3		Wider national picture puts into context York and school situation					
Anon 4		Time to reflect and time for focussed thinking. Able to be more confident about we are doing. Developing key actions to build on what we have started.		Feedback to pupil premium champions. Re-emphasise Quality First / High expectations. Further focus on deployment and impact of support staff. Give Gobs better support. Increased monitoring and analysis including behaviour and attendance as well as achievement. Get staff to mark/plan for PP children/disadvantages / SEN first, not as an afterthought.			
Anon 5		Lots of useful information.		Share information with governors and headteacher.			
Anon 6		Chance to share ideas with one another and time to think solely on this topic without other things coming into interrupt train of thought. The links sharing good practice.		Go back and insist that as a SLT / school we start to be more specific re PP funding. Address poor teaching starting with core.			
Anon 7	A re-arrangement of the presentation from Roundhay school.	Time to action plan. Time to think about what is working and what isn't.	No	Complete action plan. Organise an SLT meeting devoted to PP achievement to gather the full story and demonstrate impact.			
Anon 8		HMI opinion.		Lots!			
Anon 9	PP support in EYFS			Think more about ways to improve PP throughout school.			
Anon 10		The morning was especially useful. Hearing from other schools was helpful.		Lots - have just taken on the role as pupil premium leader so am inspired to have impact and have plenty of ideas / ways to do this following this training.			
Anon 11		Ideas for improving practice.		Read materials and use ideas ready for potential inspection.			
Anon 12		National viewpoints, model of best practice, direction of school strategies.		Review our SIP, develop new approaches - engage whole school.			

<b>Meeting Dates</b>	<b>Learning &amp; Culture Overview &amp; Scrutiny Committee - Work Plan 2014-15</b>
Wed 18 June 2014 @ 5:30pm	<ol style="list-style-type: none"> <li>1. York Museums Trust – Partnership Delivery Plan Bi-annual Update Report</li> <li>2. Scoping Report on Potential Topics for Review in this Municipal Year</li> <li>3. Overview Report on CYC Stonewall Challenge (Yvette Bent)</li> <li>4. Workplan 2014/15</li> </ol>
Wed 22 July 2014 @ 5:30pm	<ol style="list-style-type: none"> <li>1. York Theatre Royal – SLA Performance Bi-annual Update Report (deferred to September meeting)</li> <li>2. Year End Finance &amp; Performance Monitoring Report</li> <li>3. Bi-annual progress report on Safeguarding &amp; Looked After Children</li> <li>4. Overview Report on Project Plan for Narrowing the Gap</li> <li>5. Careers Review - Update on Implementation of Recommendations</li> <li>6. 'School Based Teaching on Entrepreneurship' Review Scoping Report</li> <li>7. Workplan 2014/15</li> </ol>
Wed 17 Sept 2014 @ 5:30pm	<ol style="list-style-type: none"> <li>1. York Theatre Royal – SLA Performance Bi-annual Update Report (Liz Wilson attending)</li> <li>2. Update on Refresh of Equalities Scheme inc. Introduction to relevant focus areas (Charlie Croft)</li> <li>3. First Quarter Finance &amp; Performance Monitoring Report (Richard Hartle)</li> <li>4. Update on Parks Development (Dave Meigh)</li> <li>5. Attendance of Chair of York Safeguarding Board for Bi-annual Update (Simon Westwood attending)</li> <li>6. School Improvement and Ofsted Update on Schools Performance (Maxine Squire)</li> <li>7. Workplan 2014/15 inc. verbal update on ongoing reviews</li> </ol>
Wed 19 Nov 2014 @ 5:30pm	<ol style="list-style-type: none"> <li>1. York Museums Trust – Partnership Delivery Plan Bi-annual Update Report &amp; Update on implementation of previous scrutiny recommendations (Charlie Croft &amp; Janet Barnes)</li> <li>2. Explore York Libraries and Archives Mutual Ltd SLA &amp; Bi-Annual Update (Fiona Williams)</li> <li>3. School Results Outturn (Maxine Squire)</li> <li>4. Scoping Report on proposed 'Narrowing the Gap' Scrutiny Review (Maxine Squire)</li> <li>5. Workplan 2014/15 inc. verbal update on ongoing reviews</li> </ol>

<p>Wed 21 January 2015 @ 5:30pm</p>	<ol style="list-style-type: none"> <li>1. Attendance of Chair of Learning City (Alison Birkenshaw - invite accepted)</li> <li>2. Attendance of Chair of York@Large (Chris Bailey - invite accepted)</li> <li>3. Second Quarter Finance &amp; Performance Monitoring Report (Richard Hartle)</li> <li>4. CYC Bi-annual progress report on Safeguarding &amp; Looked After Children including update on CYC's strengthened Referral and Assessment Arrangements (Eoin Rush)</li> <li>5. GCSE Results Update (Maxine Squire)</li> <li>6. Update on proposed scrutiny review of Tour de France</li> <li>7. Workplan inc. verbal update on ongoing reviews</li> </ol>
<p>24 February 2015 @ 5.30pm</p>	<ol style="list-style-type: none"> <li>1. York Theatre Royal – Service Level Agreement Performance Bi-annual Update Report (Liz Wilson)</li> <li>2. Careers Review – Further Update on Implementation of Recommendations</li> <li>3. Draft Final Report – ‘Disabled Access To York’s Heritage &amp; Cultural Offer’ Scrutiny Review</li> <li>4. Draft Final Report – ‘Narrowing the Gap’ Scrutiny Review</li> <li>5. Workplan inc. verbal update on ongoing ‘Entrepreneurship in York Schools’ Scrutiny Review</li> </ol>
<p>Wed18 March 2015 @ 5:30pm</p>	<ol style="list-style-type: none"> <li>1. Attendance of Cabinet Member for Education, Children &amp; Young People's Services – Update on priorities and challenges for 2014/15 (invite accepted)</li> <li>2. Attendance of Cabinet Member for Leisure, Culture &amp; Tourism – Update on priorities and challenges for 2014/15 (invite accepted)</li> <li>3. Attendance of Chair of Safeguarding Board – Bi-annual Update</li> <li>4. Third Quarter Finance &amp; Performance Monitoring Report (Richard Hartle)</li> <li>5. Update on Implementation of Children &amp; Families Bill (Eoin Rush)</li> <li>6. Draft Final Report – ‘Entrepreneurship in York Schools’ Scrutiny Review</li> </ol>