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| **INITIAL EQUALITY SCREENING FORM** |
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| DIVISION**:** | Business Impl & Transformation  | **TEAM:** | Regional Business |
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| **Name of Policy/Decision/Practice to be Equality Screened** |
| Regional Competition – Ambition to Grow |
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| **Is it New or Revised?** | Revised |
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| **Who Does the Policy Effect, e.g Service Users/Staff:** | Service Users |
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| **Question 1** – Define the aim of the Programme or . What is it trying to achieve? (Intended aims/outcomes) |
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| **UPDATE –** Following the successful implementation of the Ambition to Grow Pilot in October 2022, which saw a total of £1.3m of offers issued to 37 new to Invest NI companies, approval has been gained to run an “Enhanced Pilot” covering 4-5 calls during 2023/24. This will be run on a similar basis to the initial pilot, with the main differences being:* The option to include Management Salary and Capital Grant in addition to the initial Employment, Development and Revenue options.
* The removal of a “project numbers” target for each call, instead basing the number of projects supported on the availability of budget and individual Regional Office priorities. Projects will still be ranked based on performance against the scoring model and support offered on that basis.
* The option to open the application pool to existing Clients that have either achieved Wealth Creation Targets in line with current support guidelines, or have yet had Wealth Creation Targets set.

**Programme overview:**Invest NI Regional Offices are further testing a process of attracting and appraising applications for core financial support (Selective Financial Assistance/SFA). Branded “Ambition to Grow”, NI based SME’s are able to complete a short eligibility checker and if successful access an application form for support. Applications can be accessed and submitted during set application call windows. After the application call closes, applications are assessed against a scoring model with the top ranking applicants invited for a face to face interview, and if successful re then issued with an offer of support. Ambition to Grow will be used to administer each Regional Offices baseline budget, so has no ringfenced target number of offers or budget. The decision on how far down the list of applicants who achieve the pass mark will be for the relevant Regional Manager to make in line with budget availability. Support under Ambition to Grow is capped at a maximum of £45,000 per offer, with businesses having to commit to creating new employment within their business. If a business is creating fewer than 3 new positions, at least 1 of the new roles needs to be a management positions, paying a minimum basic gross salary of £30,000 and contributing to the growth of the business outside Northern Ireland. Grant will be earned over 2 years - dependent on key activities and expenditure being made.It is hoped that ATG will attract a spread of applications from throughout all areas of Northern Ireland. ATG is managed and administered by Invest NI. **Eligibility:**Ambition to Grow is aimed at Start ups, Micro, Small to Medium Enterprises based in Northern Ireland, that have either turnover under £1m **or** sales to customers outside NI of less than £300k. Invest NI is seeking to support businesses in the manufacturing or International tradeable services sectors that have plans to increase sales from customers outside Northern Ireland and with this increase employment levels. Businesses that are involved in innovative activities, paying higher salaries for new positions as well as those adding value to a product are also likely to score highly. This scheme is only open to businesses that are not currently Invest NI customers, that have not had any letter of offers from Invest NI in the last 5 years nor owe any outstanding liabilities to Invest NI. Businesses that have previously received an offer of support under any Invest NI scheme (not including Covid-19 emergency support measures or Innovation Vouchers) can apply as long as no Invest NI grant payments have been made to the Company within the last 5 years, subject to all other criteria being met. Therefore, current Invest NI customers are not eligible to apply and should contact their Client Executive if they wish to discuss support towards export growth activities.  Businesses must meet all of the following criteria:* The business must be based in Northern Ireland, with Directors based in NI
* The business must be an SME [SME definition (europa.eu)](https://single-market-economy.ec.europa.eu/smes/sme-definition_en)
* The business must provide a value added commercial product and/or service.
* The business must be able to demonstrate that it is a viable business and will remain so for the duration of the project, with evidence that your business has sufficient resources to meet the match funding requirement
* The business must currently have either annual turnover less than £1m or have annual sales to customers outside NI less than £300k
* The business must intend to increase employee headcount by a minimum of 3 new full time permanent employees over the next 1-2 years (if less than 3 FTE is proposed then at least 1 must be a Management Position paying £30,000 salary and linked to growth outside NI).
* The business must intend to grow sales from customers outside NI.
* The proposed business activity must be a strategic fit with Invest NI’s business plan - [invest-northern-ireland-business-plan-2021-22.pdf (investni.com)](https://www.investni.com/sites/default/files/2021-10/invest-northern-ireland-business-plan-2021-22.pdf)
* The Business must accept the completion of Invest NI Customer Due Diligence checks on the business, including a credit check.

**Full details of the Ambition to Grow programme can be found** [**here.**](https://www.investni.com/support-for-business/ambition-to-grow) |
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| **Question 2** – Does the Programme or have the potential to have an impact on the promotion of equality impact for any of the Section 75 groupings? (See Question 4 for list of equality groups.) | No |
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| If no go to Question 6 – Good Relations. | If yes please continue. |
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| Only a positive impact. |
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| **Consideration of Available Date/Research** |
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| **Question 3** – What  is there available – statistics or perception – to help you decide who the Programme or might affect the most? i.e. What evidence, qualitative or quantitative, have you gathered to inform your decision making process? |
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| **Assessment of Impact** |
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| **Question 4** – Explain if what you plan to do is likely to be perceived as having a high, medium or low impact upon the 9 Equality groupings according to their needs. Also if what you are planning to do is likely to be perceived as having a positive or negative effect upon the 3 different groups in relation to the promotion of good relations. |
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| **9 Equality Groups** | **Perceived Impact****High – (H)****Medium - (M)****Low – (L)** | **Why this rating?** | **Promotion of Good Relations****(Yes/No)** | **Why this rating?** |
| Religious Belief | L |       | No | While these measures aim to improve economic prosperity, they do not target specifically address the promotion of Good Relations. |
| Racial/Ethnic Group | L |       | No | While these measures aim to improve economic prosperity, they do not target specifically address the promotion of Good Relations. |
| Political Opinion | L |       | No | While these measures aim to improve economic prosperity, they do not target specifically address the promotion of Good Relations. |
| Age | L |       | No | While these measures aim to improve economic prosperity, they do not target specifically address the promotion of Good Relations. |
| Gender | L |       | No | While these measures aim to improve economic prosperity, they do not target specifically address the promotion of Good Relations. |
| Marital Status | L |       | No | While these measures aim to improve economic prosperity, they do not target specifically address the promotion of Good Relations. |
| Sexual Orientation | L |       | No | While these measures aim to improve economic prosperity, they do not target specifically address the promotion of Good Relations. |
| Disability | L | Consideration will be given to ensure accessibility for any people with disabilities applying to this programme. | No | While these measures aim to improve economic prosperity, they do not target specifically address the promotion of Good Relations. |
| Dependants | L |       | No  | While these measures aim to improve economic prosperity, they do not target specifically address the promotion of Good Relations. |
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| **Opportunities to better promote Equality of Opportunity** |
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| **Question 5** – Are there steps which could be taken to reduce any adverse impact upon the Section 75 groups as identified in Question 4? |
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| At this initial stage we do not consider that the Ambition to Grow programme will impact negatively on any Section 75 groups. It is likely to impact positively for future tranches of the programme, as the equality monitoring carried out will allow us to identify significant under representation of various categories including race, gender and disability. Our review of the programme will include analysis of the monitoring statistics and at that stage we will consider what if any further action can be taken to more directly encourage participation by any groups identified. |
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| **Good Relations** |
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| **Question 6** – Is there an opportunity in what you are trying to do to better promote Good Relations between the groups relating to Religious Belief or Racial/Ethnic Group or Political Opinion? |
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| It is unlikely there will be an opportunity to directly impact on Good Relations. |

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| **Consultation** |
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| **Question 7** – Tell us about who have talked to about your proposals internally or externally to help you decide if the needs further or no further equality investigation. |
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| Internally discussions on the proposed scheme have taken place with and input gained from colleagues from the following teams:* Performance, Compliance & Co-ordination
* Business Appraisal Team
* Regional Business Group
* International Trade Team
* Offers & Claims Team
* E-business Team
* Regional Business Managers
* Invest NI Equality Unit
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| **Question 8** – In light of the above should the be |
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| [x]  | Screened Out – No Equality Issues – Please provide rationale for this decision. |
| We do not consider that the Ambition to Grow programme will impact negatively on any Section 75 groups. It is likely to impact positively for future tranches of the programme, as the equality screening that is carried out will allow us to identify significant under representation of various categories including race, gender and disability. Our review of the programme will include analysis of the monitoring statistics and at that stage we will consider what if any further action can be taken to more directly encourage participation by any groups identified.The promotion of this new transparent and cohesive delivery model will be promoted to businesses, stakeholders, partners, FE colleges etc. informing and connecting potential entrepreneurs and businesses from all Section 75 groupings to the funding opportunity. This will help businesses/ stakeholders to understand Invest NI’s remit and the publicity will ensure Invest NI’s continued relevance for SMEs throughout NI.Financial support provided through Ambition to Grow will be from each Regional Offices baseline budget, and makes this funding more accessible to businesses not currently engaged with Invest NI. This is achieved through increased marketing, which the process to appraise a higher volume of applications without the need for casework makes achievable.  |
| [ ]  | Screened Out with some adjustments. – What adjustments have you made? |
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| [ ]  | Screened In for a deeper level of analysis of what is being considered or intended to be undertaken. (EQIA) – Please provide rationale for this decision. |
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| Signed: | Ronan Trainor | Date: | 16/05/2023 |
|  | Head of Regional Competitions - Programme Owner |  |  |
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| Approved | Pamela Marron | Date: | 30/05/23 |
|  | Equality Manager |  |  |
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| Modifications made. | Date: |       |
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| Date: |       |
| Approved by Equality Manager |  |  |