

Policy Title: Voluntary Redundancy Scheme 2026

Decision: Screen out (with mitigation)

Contact: Professor Mary Hannon-Fletcher

Date of Completion: 01 September 2026

Part 1: Policy Scoping

Information about the policy

Name of the Policy

Voluntary Redundancy Scheme 2026

Is this an existing, revised, or new policy?

A new Voluntary Redundancy Scheme, developed in consultation with representative trade unions.

This is the second in a series of three screening documents. The first screening document focused on the '*Decision to propose 450 FTE redundancies and as a consequence submit a HR1 notification and commence a 90-day consultation period (The Decision)*'. This Decision was made on 13 April 2026, in response to an unsustainable funding model for Higher Education.

The Decision was screened out for EQIA (with mitigation) and was subject to a public policy screening consultation exercise, which closed on 10 July 2026. A summary of feedback from this consultation is available on our [Consultation web page](#), and has informed the development of the VRS and this equality screening.

The public policy screening consultation exercise ran concurrently with the statutory 90-day consultation period with the representative Trade Unions; the consultation with the Unions extended beyond the statutory requirement and the final meeting took place on 27 August 2026, with the scheme opening on 7 September 2026.

The University remained committed to keeping staff informed and their wellbeing supported through the statutory 90-day consultation process. For example, it implemented:

- A series of face-to face townhall events hosted by the Vice-Chancellor and members of the senior leadership team, on each campus, to encourage two-way communication and enable staff to ask questions directly and offer ideas for further cost-saving measure;
- A 'consultation hub', providing a go-to resource for further information about the process and answers to submitted questions - acting as a single hub for updates, key information, events, contacts, and support;
- Regular email updates to staff on progress of consultation with the Trade Unions, indicative timeframes should a decision be made to proceed with a voluntary redundancy scheme, a cost-saving interim recruitment approach and portfolio support; and

- Additional support for managers and leaders; to help them lead with clarity, compassion, and confidence, supporting both their team and their own wellbeing.

These support measures will remain in place during the implementation of the VRS.

This screening pro-forma focuses on the regulations of the Voluntary Redundancy Scheme 2026 (VRS), including the compensation available, the criteria for eligibility to apply to be considered and the selection process.

The VRS is part of a prudent financial stewardship for both now and for our long-term sustainable future, however regrettably it is undertaken, to mitigate a potential annual deficit of £25million per year.

In developing the VRS, the University, determined the enhanced compensation package to be made available to staff, before developing qualifying criteria. The enhanced compensation package is based on:

- The degree to which the enhanced proposal will expand the appeal of the scheme.
- The need to ensure that the enhanced proposal is seen as fair to all categories of staff.
- Affordability.

What is it trying to achieve? (For example, intended aims and outcomes)

The aim of this VRS is to achieve role reduction and staff salary savings, **avoiding compulsory redundancies**, to secure financial sustainability.

The funding model for Higher Education in Northern Ireland is unsustainable and has created significant financial pressures for the University. Regrettably, we have been informed that no resolution for Higher Education funding will be forthcoming. The University cannot afford its current staffing model and with deep regret it has decided that it has no option other than to reduce its workforce by up to 450 employees in order to achieve financial sustainability.

The University aims to achieve this reduction by way of a Voluntary Redundancy Scheme (VRS). Where an employee leaves the University through the VRS their post will be deleted.

We consider the terms and criteria of the VRS to be fair and transparent for all who may seek to volunteer. All age-related criteria have been developed to ensure that they align with respective pension scheme rules and employment legislation.

Eligibility to apply criteria: The VRS applies to all staff, regardless of Section 75 category. To be eligible to apply, members of staff must have at least two years' service (be that full-time, part-time, permanent or fixed-term), be in posts that are fully funded by the University, have at least 12 months remaining on their contract and must not already have confirmed (by way of a letter of resignation) that they are leaving the employment of the University prior to 1 August 2027. Any member of staff providing cover for a colleague on career break, maternity leave or long-term sickness absence is **not** eligible to apply unless the substantive postholder also applies. All applications will also be assessed relative to the fundamental purpose of the scheme which is to achieve a reduction in the financial deficit.

Compensation: The compensation consists of two elements:

1. an element based on the Labour Relations Agency (LRA) [Redundancy Ready Reckoner](#) with a voluntary multiplier applied; and
2. an element based on 50% of gross annual earnings.

In line with the University's Redundancy Policy, element one is based on the greater of either the employee's actual gross weekly earnings or the rate specified in the Employment Rights Order (ERO). Element two is based on the employee's actual gross weekly earnings'. Minimum and maximum compensation has been agreed, and are illustrated in the VRS.

Selection: The primary factor used to determine if an application will be approved will be organisational resilience, that is, when an application is approved and the employee's **post is not replaced**, will the school or department be able to maintain a viable, appropriate and sustainable service. No applications will be approved until a workload assessment has been completed, to ensure that the workload of staff who remain is manageable. Additional guidance and support arrangements have been developed to underpin the approval process. A two-stage selection process will apply:

- stage one is at the Senior Leadership Team (SLT) portfolio level, and
- stage two is at SLT.

Affordability will be part of the selection process. If the overall 'pay back' period (the time it takes for the salary savings generated by eliminating a position to equal or "pay back" the total upfront cost of making that employee redundant) is greater than three years, the application for voluntary redundancy will not be approved. The employee will have the option of voluntarily reducing their redundancy compensation to make the payback period affordable.

Are there any Section 75 categories which might be expected to benefit from the policy? If so, explain how below.

Note: The Section 75 categories are:

- religious belief
- political opinion
- racial group
- age
- marital status
- sexual orientation
- sex (men and women generally)
- disability
- dependants

Age – The VRS applies equally to all staff but may be more attractive to those staff who can access their pensions, and staff who have longer service. Both these groups of staff will tend to be in older age categories.

Whilst the Scheme provides a **voluntary** option applied consistently across eligible employees, the University recognises that Section 75 categories may experience different outcomes (for example older staff and disabled staff), or greater levels of disadvantage where characteristics intersect (for example, female staff with dependants).

Who initiated or wrote the policy?

The Senior Leadership Team initiated the policy; it was written by the Senior Leadership Team, following a statutory 90-day consultation period.

Who owns and implements the policy?

The Senior Leadership Team owns and implements the VRS.

Implementation factors

Are there any factors which could contribute to or weaken the intended aim or outcome of the policy?

Yes

If yes, are they financial, legislative or other?

Financial: Funding from the Northern Ireland Government

Legislative: Compliance with relevant employment legislation

Other: Effective and timely implementation of the VRS. The University may not receive a sufficient number of applications for voluntary redundancy.

Main stakeholders affected

Who are the internal and external stakeholders (actual or potential) that the policy will impact upon?

- Staff
- Students
- Other service users (for example: prospective students or conference delegates), Government (overall responsible for HE)
- Trade Unions

Other policies with a bearing on this policy

What are they and who owns them?

Policy: Equal Opportunities Policy

Policy owner: Chief People Officer

Policy: The People, Place and Partnerships – Delivering Sustainable Futures for all Strategy

Policy owner: The Vice Chancellor

Policy: University Redundancy Policy

Policy owner: Chief People Officer

Policy: Guidance on Consultation on Fixed-Term Contracts which are due to end and Redeployment

Policy owner: Chief People Officer

Policy: Organisation Structure Change Policy

Policy owner: Chief People Officer

Policy: Equal Pay Policy

Policy owner: Chief People Officer

Available evidence

What evidence or information (both qualitative and quantitative) have you gathered to inform this policy? Please specify details for each of the Section 75 categories below.

Notes: Evidence provided is derived from a variety of sources, including the University's management information systems, AI generated information (insights), desk research (via Google search) and feedback from the recent public policy screening consultation exercise on the '*Decision to propose 450 FTE redundancies and as a consequence submit a HR1 notification and commence a 90-day consultation period*'.

Staff EO data includes casual hourly paid lecturers and Knowledge Transfer Partnership Associates.

Full time = 1FTE; Part time = <1FTE

Mode of employment: On 14 August 2026, 81.9% of staff worked full-time, whereas 18.1% worked part-time. 13.7% of staff worked part-time and were female, 4.4% of staff worked part-time and were male. 0.9% of staff work part-time, were female and disabled; 0.2% of staff work part-time, were male and disabled.

Of the 18.1% of staff who worked part time:

- 40.2% were aged 56+ years (that is, 7.3% of staff)
- 24.4% were aged 46-55% (that is, 4.4% of staff)

Religious Belief

The University's EO data were reviewed. On 14 August 2026, our staff profile was 42.5% Catholic, 35.7% Protestant and 21.8% not determined. However, representation varies by campus, with staff at the Derry~Londonderry campus being predominantly (75%+) Catholic, and the remaining campuses being predominantly Protestant. This is in line with the respective catchment areas.

In regard to Age ranges:

- 0.4% of staff are aged 16-25 and are Protestant; 0.5% of staff are aged 16-25 and are Catholic, 0.8% of staff are aged 16-25 and are Not Determined;
- 4.7% of staff are aged 26-35 and are Protestant; 6.8% of staff are aged 26-35 and are Catholic, 5.3% of staff are aged 26-35 and are Not Determined;
- 8.0% of staff are aged 36-45 and are Protestant; 10.8% of staff are aged 36-45 and are Catholic, 7% of staff are aged 36-45 and are Not Determined;
- 11.6% of staff are aged 46-55 and are Protestant; 13.1% of staff are aged 46-55 and are Catholic, 4.6% of staff are aged 46-55 and are Not Determined;

- 11.0% of staff are aged 56+ and are Protestant; 11.3% of staff are aged 56+ and are Catholic, 4.1% of staff are aged 56+ and are Not Determined.

In terms of Religious Belief, our staff profile was 62% Christian;

- 22.2% of staff identified as having 'No Religion'
- 10.2% of information was missing.
- 2.3% of staff were Muslim,
- 1.4% were Hindu,
- 0.3% were Buddhist,
- 0.9 were Spiritual,
- 0.7% held 'Other Religious Belief', and
- 0.1% were Jewish.

In the Academic Year (AY) 2025 to 2026, 70.1% of our students identified as Christian and 12.9% identified as having 'No Religion'. Compared with AY 2020 to 2021, this indicates an 3.7% increase in students who identified as Christian and a 2.4% increase in students who identified as having 'No Religion'.

Political Opinion

The University does not collect information on Political Opinion or make assumptions regarding Political Opinion based on Community Background.

Racial Group

The University's EO data were reviewed. On 14 August 2026, our staff profile was 91.7% White and 8.3% Black and Minority Ethnic (BME);

- 2.9% of staff were BME staff and female (that is, 35.1% of BME staff were female), whereas 5.4% were BME and male (that is, 64.9% of BME staff were male).
- 2.2% of staff were BME and aged 26-35 (27% of BME staff); 3.5% of staff were BME and aged 36-45 (41.6% of BME staff); 1.4% were BME and aged 46-55 (16.4% of BME staff); 1% of staff were BME and aged 56+ (12.2% of BME staff).
- 1% of staff were BME, female and aged 36-45 (12.2% of BME staff), whereas 2.5% of staff were BME, male and aged 36-45 (29.4% of BME staff).

In terms of nationality, 53.1% of staff were British, 36.2% were Irish, 2.5% were from the EU, and 8.1% were from the 'Rest of the World'.

In AY 2025 - 2026, 11.6% of students identified as BME. This indicates a 5.8% increase in BME students compared with AY 2020 to 2021.

Our BME profile suggests that we are twice as diverse as the local population, as the Northern Ireland Census 2021 suggests that 3.4% of the NI population is BME.

Age

The University's EO data were reviewed. On 14 August 2026, 1.7% were in the 16-25 age band, 16.8% of staff were in the 26-35 age band, 25.8% of staff were in the 36-45 age band, 29.3% of our staff were in the 46-55 age band and 26.4% of staff were aged '56 and above'.

In AY 2025 to 2026, the majority of students (57.2%) were aged '21 and under 40'. This indicates a 7.6% decrease in students in this category since AY 2020 to 2021. (64.8%). The number of students within the '18 and under 21' category has grown 9% compared to 2021, sitting now at 33.7%.

Marital Status

The University's EO data were reviewed. On 14 August 2026, 54% of staff were 'Married or in a Civil Partnership', 25.5% were 'Single', 11.8% were in 'Other' relationships, and 8.6% was 'Not Known'.

In AY 2025 to 2026, 77.8% of students were 'Single', a 9.3% increase compared with AY 2020 to 2021.

Sexual Orientation

The University's EO data were reviewed. On 14 August 2026, 75.3% of staff were 'Heterosexual'; 4.9% were 'Lesbian, Gay and Bisexual (LGB)' and 19.9% were 'Not Known'. Whilst LGB staff may be less visible in monitoring data due to non-disclosure, this indicates a 2.2% increase in LGB staff compared with 6 February 2021.

Although we collect student data on sexual orientation, this is not considered to be reliable.

Men and Women generally

The University's EO data were reviewed. On 14 August 2026, 57.8% of staff were 'Female':

- 0.8% of staff were female and aged 16-25, whereas 0.9% of staff were male and aged 16-25;
- 9.7% of staff were female and aged 26-35, whereas 7.1% of staff were male and aged 26-35;
- 14.1% of staff were female and aged 36-45, whereas 11.7% of staff were male and aged 36-45;
- 17.7% of staff were female and aged 46-55, whereas 11.6% of staff were male and aged 46-55;
- 15.5% of staff were female and aged 56+, whereas 11% of staff were male and aged 56+.

In AY 2025 to 2026, 58.8% of students were 'Female', a 0.4% decrease compared with AY 2020 to 2021.

Disability

The University's EO data were reviewed. On 14 August 2026, 7.7% of staff declared a disability;

- 1.9% of staff were disabled and aged 36-45; 2.3% of staff were disabled and aged 46-55; 2% were disabled and aged 56+;
- 1.3% of staff were disabled, female and aged 36-45; 1.6% of staff were disabled, female and aged 46-55%; 1.3% of staff were disabled, female and aged 56+; and
- 0.7% of staff were disabled, male and aged 36-45; 0.7% of staff were disabled, male and aged 46-55%; 0.7% of staff were disabled, male and aged 56+.

In AY 2025 to 2026, 8.3% of students declared a disability, a decrease of 3.8% compared with AY 2020 to 2021.

Our disability declaration rate is lower than expected, compared with the local population. The NI Census (2021) found that 24% of the NI population stated that

their day-to-day activities were limited because of a long-standing health problem or disability.

Dependants

The University's EO data were reviewed. On 14 August 2026, 42.5% of staff had dependants. Of these:

- 83.1% cared for a child;
- 6.4% cared for a child and an adult;
- 5.5% cared for an adult;
- 1.9% cared for a child and a disabled adult;
- 1.4% cared for a disabled person;
- 1.0% cared for an adult and a disabled person; and
- 0.5% cared for a child, adult and a disabled person.

24.8% of staff were female with dependants, whereas 17.7% of staff were male with dependants.

6.1% of staff were female with dependants and were aged 36-45; 9.6% of staff were female with dependants and were aged 46-55; and 7.8% of staff were female with dependants and were aged 56+.

4.6% of staff were male with dependants and were aged 36-45; 6.1% of staff were male with dependants and were aged 46-55; and 6.1% of staff were male with dependants and were aged 56+.

In AY 2025 to 2026, 11.2% of students declared they had dependants, a decrease of 1.4% compared to AY 2020 to 2021.

Needs, experience and priorities

Taking into account the information referred to above, what are the different needs, experiences and priorities of each of the following categories, in relation to the particular policy or decision? (Please specify for each of the Section 75 categories below the needs, experiences and priorities)

Religious Belief

Staff composition by Community Background varies between and throughout the University Campuses (and by Employment Category), and is monitored annually and triennially through the our 'fair employment' monitoring reports. However, our equality data indicate that staff with long service (20+ years) are more likely to be Protestant than Catholic. For example:

- 42.3% of staff with 10+ years were Protestant, whereas 45.2% were Catholic;
- 44.2% of staff with 15+ years were Protestant, whereas 47.6% were Catholic;
- 48.1% of staff with 20+ years were Protestant, whereas 43.2% were Catholic;

This is to be expected, given the historical context of the University.

Religious Belief does not come into the selection process for **voluntary** redundancy, however it is possible that staff (in different roles and grades) may experience different attitudes to job security, pension considerations, or local labour-market alternatives connected to community or locality.

When launching the VRS, consideration will need to be taken to ensure that the window to submit applications does not overlap with significant periods of religious observance. Groups that observe this period may need to be given additional time to consider their options.

Political Opinion

None identified. The VRS criteria are based on objective business need (role, function, service requirement) and not on perceived political opinion or philosophical belief.

Racial Group

[Northern Ireland Labour Force](#) statistics suggest that people in minority ethnic groups have higher levels of unemployment compared to the overall population. Therefore, it is possible that minority ethnic staff (in different roles and grades) may experience

different attitudes to job security, pension considerations, or local labour-market alternatives connected to community or locality.

Visa-sponsored staff may face additional uncertainty (for example, sponsorship implications) not faced by other staff if their post is affected (changes or ends), even under a **voluntary** scheme. Clear information is required to ensure that all staff understand the potential impact of being approved for **voluntary** redundancy and can take appropriate advice, as needed.

Minoritised ethnic staff may experience possible language or cultural barriers to engaging fully with consultation processes or understanding scheme terms. Clear, accessible communications are necessary, along with translation or interpretation support if needed.

Age

Age and length of service schemes linked to statutory government models are often seen as objectively justified under employment law, as they typically reward experience or smooth workforce planning. However, courts still require employers to prove that the specific rule (criterion) meets a legitimate business goal and is appropriate and necessary.

Younger staff (16–24) and older staff (66+) form smaller proportions of our workforce, however, statutory redundancy provisions and pension considerations may affect these groups differently. Staff aged 56+ represent 26.4% of staff overall, and may be more likely to consider **voluntary** redundancy due to proximity to retirement.

At age 55, there are provisions, dependent on the pension provider, for some individuals to obtain their pension. Older staff approaching pension age may experience the scheme very differently (as an opportunity) compared with early or mid-career staff (who may experience it as a threat to career progression or job security).

According to the Centre for Ageing Better (2025), employment rates for 50-64-year-olds are 71.6% compared to 85.7% for 35-49-year-olds.

The employment age gap for 50+ workers has grown to 14.1 percentage points compared to before the pandemic when the difference between 50-64 and 35-49 age groups was just 13.1 percentage points.

There are now almost one million (992,000) more older workers in economic inactivity than prior to the Covid-19 pandemic five years ago.

Employment prospects of older workers are significantly lower than their younger counterparts. If an older worker is made redundant, they will, statistically, have a significantly more difficult task finding alternative employment.

Evidence from the wider public sector shows that younger people are more likely to have higher turnover in employment than older workers. This may mean that in addition to the age factor, a shorter length of service could result in comparatively lower entitlements under redundancy schemes, or as at Ulster University, ineligibility to apply for **voluntary** redundancy.

Younger or more recently appointed staff are often least likely to volunteer but most exposed if the **voluntary** scheme does not deliver sufficient savings and **compulsory** redundancy follows. Similarly, there is a potential impact on early-career staff if **voluntary** redundancy creates promotion or progression bottlenecks, or conversely reduces opportunities if posts are not backfilled.

Marital Status

None identified. Limited direct evidence base typically exists for differential impact by marital status **alone** in redundancy exercises. Any impact is more likely to arise indirectly, through financial dependency (dual income versus single income household) or caring roles, rather than marital status itself. See also Dependents.

Sexual Orientation

None identified. Sexual orientation monitoring data in higher education is often incomplete due to non-disclosure, which limits the ability to detect patterns. Official statistics or mandatory reporting frameworks for a specific lesbian, gay, and bisexual (LGB) pay gap do not currently exist in Northern Ireland.

Any reduction in student services may have a disproportionate negative impact on this Section 75 group.

Men and Women generally

According to the [Higher Education Statistics Agency](#) (HESA): In the UK higher education (HE) sector, women make up a majority of overall staff (51% of full-time, 65% of part-time) but face higher rates of insecure employment. Approximately 29% of academic staff are on fixed-term contracts, with women overrepresented in teaching-only and lower-security roles, while men hold a higher share of senior and permanent professorial positions.

Gender does not come into the selection process for **voluntary** redundancy, however it is possible that men and women (in different roles and grades) may

experience different attitudes to job security, pension considerations, or local labour-market alternatives connected to periods of absence (for example, related to pregnancy or maternity).

The Women's Budget Group report on Women and Pensions in the UK (2026) notes that: 'Women make up the majority of pensioners and pensioners living in poverty. The Department for Work and Pension's own data shows 57% of pensioners in poverty are women. Women also live statistically longer than men and are more likely to be single in later life due to widowhood or divorce—factors that impact retirement income needs.'

Pregnant staff or those on or returning from maternity leave require particular care — both in terms of inclusion or exclusion from the scheme and in how communications reach them. Clear and timely communications (access to information, timelines or special provisions) relating to the **voluntary** redundancy process are required to all staff who are not currently in the workplace, to ensure that they not disadvantaged. This includes staff on adoption or shared parental leave.

Employees who are transitioning may prioritise working for a known supportive employer and therefore feel that **voluntary** redundancy is not an option for them.

Disproportionate uptake within particular age bands could have implications for gender balance across the workforce.

Disability

[ECNI statistics](#) suggest that disabled people have higher levels of unemployment compared to the overall population; they have to apply for 60% more jobs before finding one. According to [NISRA](#), the disability employment gap for 2021 was 47.6%.

Disabled staff may have a different risk and benefit calculation around **voluntary** redundancy — for some it may represent a positive opportunity (for example, linked to ill-health or fit with caring or health needs), while for others it may increase anxiety about future employability elsewhere. Disabled staff may find it more difficult to get alternative employment following either **voluntary** or **compulsory** redundancy.

Application, selection and redeployment processes can raise potential barriers to certain groups of disabled people. Where necessary, adjustments will need to be made to these processes to ensure that people within these groups are not disadvantaged. Reasonable adjustments such as extended deadlines or one-to-one support (on request) could enable disabled staff to engage fully with the process. Staff with long-term health conditions may need extended time or additional support to make an informed decision.

Clear signposting to occupational health, pension, and wellbeing support is provided within the FAQ section of the University's Consultation Hub, which may benefit disabled staff considering **voluntary** redundancy. Accessible formats are required for all VRS communications.

Any reduction in student services may have a disproportionate negative impact on this Section 75 group.

Dependants

Staff with caring responsibilities may need longer to make a considered decision or may be more risk-averse about leaving secure employment given dependant-related financial pressures (such as childcare or care costs).

The University has made adjustments (such as one-to-one support) to VRS processes to ensure that staff with significant caring responsibilities are able to engage fully.

Flexible or part-time working is often linked to caring responsibilities, which may correlate with the roles or grades most exposed to a **compulsory** redundancy scheme (see also 'Men and women generally', above).

Signposting to financial and wellbeing guidance (that addresses dependant-related financial planning) is required.

Consultation

Consultation with relevant groups, organisations or individuals about the policy can provide useful information about issues or opportunities which are specifically related to them (that is evidence to inform the policy).

Please indicate whether you carried out or intend to carry out any consultation exercises prior to equality screening?

Yes. The following groups were consulted during the development of this policy:

- Senior Leadership Team
- University Solicitors
- Trade Unions.

Part 2: Screening questions

Introduction

The answers to the following screening questions will assist the University in making a decision whether or not there is a need to carry out an equality impact assessment on the policy. The following information is provided to help you to identify and comment on the level of likely impact of the policy in question 1 to 4.

Select 'major' impact if:

- a) The policy is significant in terms of its strategic importance;
- b) Potential equality impacts are unknown, because, for example, there are insufficient data upon which to make an assessment or because they are complex, and it would be appropriate to conduct an equality impact assessment in order to better assess them;
- c) Potential equality and/or good relations impacts are likely to be adverse or are likely to be experienced disproportionately by groups of people including those who are marginalised or disadvantaged;
- d) Further assessment offers a valuable way to examine the evidence and develop recommendations in respect of a policy about which there are concerns amongst affected individuals and representative groups, for example in respect of multiple identities;
- e) The policy is likely to be challenged by way of judicial review;
- f) The policy is significant in terms of expenditure.

Select 'minor' impact if:

- a) The policy is not unlawfully discriminatory and any residual potential impacts on people are judged to be negligible;
- b) The policy, or certain proposals within it, are potentially unlawfully discriminatory, but this possibility can readily and easily be eliminated by making appropriate changes to the policy or by adopting appropriate mitigating measures;
- c) Any asymmetrical equality impacts caused by the policy are intentional because they are specifically designed to promote equality of opportunities for particular groups of disadvantaged people;

- d) By amending the policy there are better opportunities to better promote equality of opportunity and/or good relations;
- e) Differential impact observed and opportunities exist to better promote equality of opportunity and/or good relations.

Select 'none' if:

- a) The policy has no relevance to equality of opportunity or good relations;
- b) The policy is purely technical in nature and will have no bearing in terms of its likely impact on equality of opportunity or good relations.

Taking into account the evidence presented in Part 1, please complete the screening questions (Question 1 to 4).

Screening questions

1. What is the likely impact on equality of opportunity for those affected by this policy, for each of the Section 75 categories?

Details of the likely policy impacts on **Religious Belief**

The impact of the VRS on this category is not known, given that this is a **voluntary** Scheme and it is open to all eligible staff to apply. However, we will monitor the impact of the VRS throughout its implementation.

Religious Belief does not come into the selection process for **voluntary** redundancy, however it is possible that staff (in different roles and grades) may experience different attitudes to job security, pension considerations, or local labour-market alternatives connected to community or locality.

What is the level of impact?

Minor

Details of the likely policy impacts on **Political Opinion**

The VRS is unlikely to impact on equality of opportunity for this category; Political Opinion bears no relevance to the selection process for **voluntary** redundancy.

Level of impact

None

Details of the likely policy impacts on **Racial Group**

The impact of the VRS on this category is not known, given that this is a **voluntary** Scheme and it is open to all eligible staff to apply. However, we will monitor the impact of the VRS throughout its implementation.

Racial Group does not come into the selection process for **voluntary** redundancy. A person's immigration status will not be a factor in eligibility to apply for **voluntary** redundancy, or in the selection process; however there may be a potential impact arising from immigration regulations rather than differential treatment within the programme itself. Line Managers will need to ensure that sponsorship implications for affected staff are flagged at the earliest opportunity, separate to the equality screening itself.

Level of impact
Minor

Details of the likely policy impacts on **Age**

The VRS is likely to impact on equality of opportunity for this group; an element of the compensation is calculated using the LRA Redundancy Ready Reckoner, which is likely to benefit older staff with longer service, who **volunteer** for redundancy. Younger or more recently appointed staff may experience different attitudes to job security, pension considerations, or local labour-market alternatives and be less likely to **volunteer** for redundancy.

Level of impact
Minor

Details of the likely policy impacts on **Marital Status**

The VRS is unlikely to impact on equality of opportunity for this category; no differential impact is anticipated on the basis of marital status alone, however there could be indirect effects related to financial or dependency factors. See 'Dependants', below.

Level of impact
None

Details of the likely policy impacts on **Sexual Orientation**

The VRS is unlikely to impact on equality of opportunity for this category; Sexual Orientation bears no relevance to the selection process for **voluntary** redundancy.

Level of impact
None

Details of the likely policy impacts on **Men and Women generally**

The impact of the VRS on this category is not known, given that this is a **voluntary** Scheme and it is open to all eligible staff to apply. However, we will monitor the impact of the VRS throughout its implementation.

This category does not come into the selection process for **voluntary** redundancy, however it is possible that staff (in different roles and grades) may experience different attitudes to job security, pension considerations, or local labour-market alternatives connected to periods of absence (pregnancy and maternity) and mode of working (flexible or part-time hours). Employees who are transitioning may prioritise working for a known supportive employer and therefore feel that **voluntary** redundancy is not an option for them.

Level of impact
Minor

Details of the likely policy impacts on **Disability**

Based on previous Voluntary Exit Schemes, the VRS is likely to impact on equality of opportunity for this category; disability status does not come into the selection process for **voluntary** redundancy, however it is possible that disabled staff may have a different risk and benefit calculation around **voluntary** redundancy. For some, it may represent a positive opportunity (for example, linked to ill-health or fit with caring or health needs), while for others it may increase anxiety about future employability elsewhere.

Level of impact
Minor

Details of the likely policy impacts on **Dependants**

The VRS is likely to impact on equality of opportunity for this category; Dependants status does not come into the selection process for **voluntary** redundancy, however it is possible staff with caring responsibilities may be more risk-averse about leaving secure employment given dependant-related financial pressures (such as childcare or care costs).

Level of impact
Minor

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

Religious Belief

No, the Scheme provides a **voluntary** option applied consistently across eligible employees. The qualifying criteria ensure that applications are prioritised and controlled in an efficient manner in terms of providing support and advice, maintaining operational capability and integrity and sustaining appropriate staffing levels. Impacts will be monitored throughout the Scheme's implementation to ensure alignment with Section 75.

Clear, accessible communications will be provided throughout the process, along with translation or interpretation support if needed.

Political Opinion

No, the Scheme provides a **voluntary** option applied consistently across eligible employees. The qualifying criteria ensure that applications are prioritised and controlled in an efficient manner in terms of providing support and advice, maintaining operational capability and integrity and sustaining appropriate staffing levels. Impacts will be monitored throughout the Scheme's implementation to ensure alignment with Section 75.

Clear, accessible communications will be provided throughout the process, along with translation or interpretation support if needed.

Racial Group

No, the Scheme provides a **voluntary** option applied consistently across eligible employees. The qualifying criteria ensure that applications are prioritised and controlled in an efficient manner in terms of providing support and advice, maintaining operational capability and integrity and sustaining appropriate staffing levels. Impacts will be monitored throughout the Scheme's implementation to ensure alignment with Section 75.

Clear, accessible communications will be provided throughout the process, along with translation or interpretation support if needed.

Age

No, the Scheme provides a **voluntary** option applied consistently across eligible employees. The qualifying criteria ensure that applications are prioritised and controlled in an efficient manner in terms of providing support and advice, maintaining operational capability and integrity and sustaining appropriate staffing levels. Impacts will be monitored throughout the Scheme's implementation to ensure alignment with Section 75.

Clear, accessible communications will be provided throughout the process, along with translation or interpretation support if needed.

Marital Status

No, the Scheme provides a **voluntary** option applied consistently across eligible employees. The qualifying criteria ensure that applications are prioritised and controlled in an efficient manner in terms of providing support and advice, maintaining operational capability and integrity and sustaining appropriate staffing levels. Impacts will be monitored throughout the Scheme's implementation to ensure alignment with Section 75.

Clear, accessible communications will be provided throughout the process, along with translation or interpretation support if needed.

Sexual Orientation

No, the Scheme provides a **voluntary** option applied consistently across eligible employees. The qualifying criteria ensure that applications are prioritised and controlled in an efficient manner in terms of providing support and advice, maintaining operational capability and integrity and sustaining appropriate staffing levels. Impacts will be monitored throughout the Scheme's implementation to ensure alignment with Section 75.

Clear, accessible communications will be provided throughout the process, along with translation or interpretation support if needed.

Men and Women generally

No, the Scheme provides a **voluntary** option applied consistently across eligible employees. The qualifying criteria ensure that applications are prioritised and controlled in an efficient manner in terms of providing support and advice,

maintaining operational capability and integrity and sustaining appropriate staffing levels. Impacts will be monitored throughout the Scheme's implementation to ensure alignment with Section 75.

Clear, accessible communications will be provided throughout the process, along with translation or interpretation support if needed.

Disability

No, the Scheme provides a **voluntary** option applied consistently across eligible employees. The qualifying criteria ensure that applications are prioritised and controlled in an efficient manner in terms of providing support and advice, maintaining operational capability and integrity and sustaining appropriate staffing levels. Impacts will be monitored throughout the Scheme's implementation to ensure alignment with Section 75.

Clear, accessible communications will be provided throughout the process, along with translation or interpretation support if needed.

Dependants

No, the Scheme provides a **voluntary** option applied consistently across eligible employees. The qualifying criteria ensure that applications are prioritised and controlled in an efficient manner in terms of providing support and advice, maintaining operational capability and integrity and sustaining appropriate staffing levels. Impacts will be monitored throughout the Scheme's implementation to ensure alignment with Section 75.

Clear, accessible communications will be provided throughout the process, along with translation or interpretation support if needed.

3. To what extent is the policy likely to impact on good relations between people of different religious belief, political opinion or racial group?

Religious Belief

Details of the likely policy impacts on **Religious Belief**

The VRS is unlikely to impact on good relations for this group; it bears no relevance to good relations.

Level of impact

None

Political Opinion

Details of the likely policy impacts on **Political Opinion**

The VRS is unlikely to impact on good relations for this group; it bears no relevance to good relations.

Level of impact

None

Racial Group

Details of the likely policy impacts on **Racial Group**

The VRS is unlikely to impact on good relations for this group; it bears no relevance to good relations.

Level of impact

None

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

Religious Belief

No, the VRS bears no relevance to good relations.

Political Opinion

No, the VRS bears no relevance to good relations.

Racial Group

No, the VRS bears no relevance to good relations.

Additional considerations

Multiple identity

5. Generally speaking, people can fall into more than one Section 75 category. Taking this into consideration, are there any potential impacts of the policy or decision on people with multiple identities? (For example, disabled minority ethnic people; disabled women; young Protestant men, and young lesbians, gay and bisexual people).

Yes

Please specify the relevant Section 75 categories concerned below.
Provide details of the policy impact and data which describes the policy impact.

All those impacted by this VRS comprise multiple identities, and it is envisaged that some experiences may be compounded where categories intersect (for example, disability and age, women and dependants).

Disability Duties

6. Does the policy provide an opportunity to encourage disabled people to participate in University life?

Yes, where necessary, adjustments will be made to the VRS processes to ensure that disabled people are not disadvantaged.

Clear signposting to occupational health, pension, and wellbeing support is provided within the FAQ section of the University's Consultation Hub, which may benefit disabled staff considering **voluntary** redundancy. All VRS communications are provided in accessible formats.

7. Does the policy provide an opportunity to promote positive attitudes towards disabled people?

No, the Scheme provides a **voluntary** option applied consistently across eligible employees. Disability status does not come into the selection process for **voluntary** redundancy.

Part 3: Screening decision

Based on the evidence considered and outlined in Part 1 and the responses to the screening questions (Part 2), please indicate the screening decision for this policy.

Note: The University should take particular care not to screen out policies that have a procurement aspect if there is potential to promote equality of opportunity through the procurement of services.

- ☐ **Screen in** the policy (that is, subject to an Equality Impact Assessment). The likely impact is **major** in respect of one, or more of the equality of opportunity or good relations categories.
- ☐ **Screen out** the policy without mitigation or an alternative policy proposed to be adopted (that is, **no** Equality Impact Assessment). The likely impact is **none** in respect of all of equality of opportunity or good relations categories.
- ☒ **Screen out** the policy and **mitigate the impacts on equality by amending or changing the policy**, or by **developing an alternative policy or action** (that is, **no** Equality Impact Assessment). The likely impact is **minor** in respect of one or more of the equality of opportunity or good relations categories.

If the decision is to subject the policy to an equality impact assessment (that is, 'screen in' the policy), please provide details of the reasons.

Not applicable

If the decision is not to conduct an equality impact assessment (that is, 'screen out' the policy), please provide details for the reasons.

Not applicable

If the decision is not to conduct an equality impact assessment (that is, 'screen out' the policy), and mitigate the impacts on equality of opportunity by amending or changing the policy, or by developing an alternative policy or action, please provide reasons to support your decision, together with the proposed changes, amendments or alternative policy.

The likely impact is **minor** in respect of one or more of the equality of opportunity or good relations categories.

The VRS has been developed through established governance and consultation processes, with equality considerations embedded throughout design and decision-making. It aims to achieve role reduction and staff salary savings, avoiding **compulsory** redundancies. Having considered all options and presenting various relevant data to the Trade Unions, we believe the VRS is necessary to safeguard the institution for the future, ensure its long-term financial viability, to complement other cost saving measures that are already ongoing.

After taking all relevant factors into account (which includes giving due weight to the equality issues and feedback from the previous consultation exercise), we believe that an EQIA is not necessary, and that it would be a disproportionate use of resources to conduct one. The VRS complies with the relevant legislation, and staff whose application is accepted will benefit from an enhanced redundancy payment.

Mitigation: During the 90-day statutory consultation period a centralised 'Consultation Hub', to help colleagues navigate uncertainty. This will remain in place during the implementation of the VRS, and be developed to ensure clear, transparent and effective communications throughout every stage of its implementation, such as:

- signposting to a 'modeller' which will enable staff to find out for themselves what the redundancy payment will be;
- clear guidelines on the scheme; and
- pension advice to be provided in house by USS and NILGOSC.

In addition, we will:

- review and update (monitor against workforce profile) EO data at key stages of the implementation of the VRS - following the application window, and after final decisions have been made. This will enable us to identify and assess any emerging disproportionate impact on those with protected characteristics;
- ensure that staff away from the office (for example due to maternity leave, career break or long term sickness absence) are made aware of the options provided by the VRS - People Partners to send letters individually to those not in work to ensure that they are able to access relevant information and any support needed;
- ensure that Visa-sponsored staff are made aware of sponsorship implications relating to **voluntary** redundancy;
- ensure that staff with dependants are signposted to financial and wellbeing guidance (that addresses dependant-related financial planning) – People Partners and People Advisers (who will support the People Partners) to provide one-to-one support for staff with dependants, on request, for the duration of the scheme;

- assess and communicate clearly what happens if **voluntary** redundancy is insufficient, in terms of ‘cost-saving’;
- consider impact on workloads, succession planning and career progression pipelines for early-career staff and staff who remain in post after the VRS. This does not mean that we will be expecting colleagues to do more with less. This will include what might need to be stopped, paused, deprioritised, realigned, or reconfigured so that it is sustainable and motivational for all who remain in our staff community;
- reserve the right to retain employees on the grounds of specialist knowledge, training and qualifications or to preserve organisational balance;
- continue to prioritise providing an outstanding student experience which firmly focuses on high-quality teaching, informed by pioneering research, throughout this process;
- expect that colleagues would not all leave at the same time; but rather that colleagues would leave in tranches between April and July of 2027 – to minimise impact as much as possible, and to reflect organisational need and an individual's notice arrangements;
- continue to keep our non-staff costs (capital spend) under close review to try and make savings that would support improvement in our financial position; and
- consider other options for savings in relation to staff costs, such as unpaid career breaks or reducing staff hours.

Timetabling and prioritising

If the policy had been '**screened in**' for an equality impact assessment, then please answer the following questions to determine its priority for timetabling the equality impact assessment.

On a scale of 1 to 3, with 1 being the lowest priority and 3 being the highest, assess the policy in terms of its priority for equality impact assessment.

Priority rating for timetabling the equality impact assessment in terms of effect on equality of opportunity and good relations:

Not applicable

Priority rating for timetabling the equality impact assessment in terms of social need

Not applicable

Priority rating for timetabling the equality impact assessment in terms of effect on people's daily lives

Not applicable

Priority rating for timetabling the equality impact assessment in terms of relevance to the University's functions

Not applicable

Note: The Total Rating Score will be used to prioritise the policy in rank order with other policies screened in for equality impact assessment. This list of priorities will assist the University in timetabling. Details of the University's Equality Impact Assessment Timetable will be included in its quarterly Screening Reports.

Is the policy affected by timetables established by other relevant public authorities?

Not applicable

Approval and authorisation

Screened by:



Position or Job Title: Director of People and Culture

Date screened: 1 September 2026



Approved by:

Position or Job Title: Chief People Officer

Date approved: 1 September 2026

Review

The VRS is due for review (in terms of its impact on equality of opportunity and good relations) by the policy owner once it is complete. This review will inform the 'next steps' for delivering role reduction (cost savings) at Ulster University, if required. This could be a decision to open a second round of the VRS, or a compulsory process; this decision will be equality screened, forming the third of three screening documents relating to role reduction.