



**PWYLLGOR CYLLID A PHERFFORMIAD
FINANCE AND PERFORMANCE COMMITTEE**

DYDDIAD Y CYFARFOD: DATE OF MEETING:	16 December 2025
TEITL YR ADRODDIAD: TITLE OF REPORT:	Financial Procedures
CYFARWYDDWR ARWEINIOL: LEAD DIRECTOR:	Huw Thomas, Executive Director of Finance
SWYDDOG ADRODD: REPORTING OFFICER:	Tim John, Head of Accounting and Statutory Reporting

Pwrpas yr Adroddiad (dewiswch fel yn addas)

Purpose of the Report (select as appropriate)

Ar Gyfer Penderfyniad/For Decision

**ADRODDIAD SCAA
SBAR REPORT**

Sefyllfa / Situation

Each year planned reviews are undertaken of the financial procedures operated by Hywel Dda University Health Board (HDdUHB). The procedures, which set out the main financial system controls, are reviewed in terms of:

- Relevance
- Best practice
- Audit recommendations
- System change
- Health Board policy

The Finance and Performance Committee can take assurance that there is a robust review process in place in respect of financial procedures.

Cefndir / Background

The following procedures have been reviewed and are presented to the Finance and Performance Committee for approval:

- **Financial Procedure 1049** – Use of Consultancy

The purpose of these documents is to outline the key processes to be followed by Health Board staff in connection with the above-named financial procedures and to set out associated roles and responsibilities.

Asesiad / Assessment

- **Financial Procedure 1049** – Use of Consultancy

The financial procedures are covered by a specific Financial Procedures Equality Impact Assessment (EqIA) with no negative impact.

Argymhelliad / Recommendation

The Finance and Performance Committee is asked to **APPROVE** the following updated financial procedures:

- **Financial Procedure 1049 – Use of Consultancy**

Amcanion: (rhaid cwblhau) Objectives: (must be completed)	
Committee ToR Reference: Cyfeirnod Cylch Gorchwyl y Pwyllgor:	3.13 Review and approve financial procedures on behalf of the Health Board
Cyfeirnod Cofrestr Risg Datix a Sgôr Cyfredol: Datix Risk Register Reference and Score:	Not Applicable
Parthau Ansawdd: Domains of Quality Quality and Engagement Act (sharepoint.com)	Not Applicable
Galluogwyr Ansawdd: Enablers of Quality: Quality and Engagement Act (sharepoint.com)	Not Applicable
Amcanion Strategol y BIP: UHB Strategic Objectives:	All Strategic Objectives are applicable
Amcanion Cynllunio Planning Objectives	Not Applicable
Amcanion Llesiant BIP: UHB Well-being Objectives: Hyperlink to HDdUHB Well-being Objectives Annual Report 2021-2022	10. Not Applicable

**Gwybodaeth Ychwanegol:
Further Information:**

Ar sail tystiolaeth:
Evidence Base:

Previous procedures, internal audit report recommendations, standing financial instructions.

Rhestr Termau: Glossary of Terms:	Included within the body of the report.
Partion / Pwyllgorau â ymgynhorwyd ymlaen llaw y Pwyllgor Adnoddau Cynaliadwy: Parties / Committees consulted prior to Sustainable Resources Committee:	HDdUHB Finance HDdUHB Local Counter Fraud Service NWSSP – Procurement Services

Effaith: (rhaid cwblhau) Impact: (must be completed)	
Ariannol / Gwerth am Arian: Financial / Service:	Financial procedures are required to ensure sound financial control.
Ansawdd / Gofal Claf: Quality / Patient Care:	Not Applicable
Gweithlu: Workforce:	Not Applicable
Risg: Risk:	Financial procedures are required to ensure good governance and therefore minimise risk.
Cyfreithiol: Legal:	Not Applicable
Enw Da: Reputational:	Financial procedures are required to ensure good governance and sound financial control.
Gyfrinachedd: Privacy:	Not Applicable
Cydraddoldeb: Equality:	EqIA has been undertaken with no negative impacts on those with protected characteristics.

Use of Consultancy

Procedure information

Procedure number: 1049

Classification: Financial

Supersedes: 2.0

Version number: 3.0

Date of Equality Impact Assessment: *Detail date of EqIA*

Approval information

Approved by: Finance and Performance Committee

Date of approval: *Enter approval date*

Date made active: *Enter date made active (completion by policy team)*

Review date: *Enter review date (normally three years from approval date)*

Hywel Dda University Health Board

Summary of document:

This document provides details of the process to be followed when considering using the services of management consultants.

Scope:

Hywel Dda University Health Board wide

To be read in conjunction with:

[Standing Orders Hywel Dda University Local Health Board](#) (opens in a new tab)

[Standing Financial Instructions](#) (opens in a new tab)

[Counter Fraud, Bribery and Corruption Policy](#) (opens in a new tab)

[Purchase to Pay Procedure](#) (opens in a new tab)

[Financial Procedures](#) (opens in a new tab)

Patient information:

N/A

Owning group:

Finance Directorate

Date signed off by owning group

Executive Director job title:

Director of Finance

Reviews and updates:

1.0 – New Procedure – 28/10/2021

2.0 – Clarified definition of consultancy and included flowchart for assurance and approval process to be followed – 22/12/2022

3.0 – Review – *Enter approval date*

Keywords

Use of consultancy

Glossary of terms

HDdUHB - Hywel Dda University Health Board

SFIs - Standing Financial Instructions

FPC – Finance and Performance Committee

ARAC - Audit and Risk Assurance Committee

CEO - Chief Executive Officer

DoF - Director of Finance

ET - Executive Team

FRAUD, BRIBERY AND CORRUPTION

All staff are required to comply with the Health Board's policies and procedures and apply best practice in order to prevent Fraud, Bribery and Corruption. Staff should be made aware of their own responsibilities in protecting the Health Board from these crimes.

All staff have a duty to notify the Local Counter Fraud Department of any suspected fraud or inappropriate actions and are protected by the [All Wales Procedure for NHS Staff to Raise Concerns Policy](#) (opens in a new tab). Anyone who suspects fraud or has any concerns reference Fraud Bribery and Corruption can make a referral by contacting the Counter Fraud Department by any of the following methods:

- Telephoning the office on 01267 266268,
- Emailing HDUHB.CounterFraudTeam.HDD@wales.nhs.uk,
- Making an online referral at <https://reportfraud.cfa.nhs.uk> or
- Making an anonymous referral by telephoning Crimestoppers on 0800 028 40 60.

Staff should refer to the [Counter Fraud, Bribery and Corruption Policy](#) (opens in a new tab) for further information.

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Introduction

This procedure details the guidelines set for the application and approval process for use of Consultancy services within Hywel Dda University Health Board (HDdUHB).

Scope

The procedure is applicable across the whole of Hywel Dda University Health Board (HDdUHB). It applies to all employees and Independent Members. The term “employees” includes all those who have a contract of employment or honorary contract with the HDdUHB, including volunteers and bank workers.

Aim

The aim of this document is to:

- Provide guidance for the use of Consultancy within Hywel Dda University Health Board (HDdUHB). This is to minimise the risk of incurring expenditure inappropriately and ensuring best value for money is achieved.

Objectives

The aim of this document will be achieved by the following objectives:

- Confirming the principles around definition of consultancy and when the Health Board would use Consultancy
- Providing clear procedures to follow when the decision has been made to use Consultancy
- Identifying the delegated limits for Consultancy spend
- Providing the reporting mechanism for Consultancy spend
- Review of outcomes

Roles and Responsibilities

Any Manager using Consultancy needs to undertake the actions outlined within this procedure. Approval needs to follow delegated limits which is outlined in '[Approval limits](#)'. The manager, with support from Procurement, will need to ensure there is a post project review as outlined in '[Post review and value for money](#)'.

Principles

Definition

Consultancy seeks to fill a knowledge gap. It is defined as **the provision to management of objective advice relating to strategy, structure, management or operations of an organisation**. It will usually be related to business change or transformation. Such advice will be provided outside the 'business as usual' environment when in-house skills are not available and will be time-limited. The consultants

delivering the service will operate outside of the client organisation's structure and staffing establishment, with payment based on the delivery of a defined service or output.

Consultancy often includes the identification of options with recommendations, or assistance with the implementation of solutions but typically not the delivery of business as usual activity (e.g. advising on legal risk or technical matters). Such contracts should usually be categorised as professional services, rather than consultancy services

The limits and processes set out in this procedure relate to Consultancy services. The use of professional services falls under the standard guidelines for non-pay expenditure set out in [1054 - Purchase to Pay procedure](#) (opens in a new tab)

Areas where the need for Consultancy may arise, together with definition of Consultancy and Professional services, as identified by the Government guidance of 'Consultancy and Professional Services spend control' is included in [Appendix 1](#).

Why appoint Consultants?

Typically, there are 3 main reasons why you may want to use consultants:

- the expertise the consultant offers
- their independent viewpoint
- the resources they provide

Alternatives

There are alternatives to using consultants and these should be tested before the commencement of any appointments process. These can be best summarised as follows:

- Use your own personnel: quite often over-looked but there may be capacity within the organisation in its broadest sense who could undertake an assignment particularly if an independent view is not required. This could be supplemented with some additional training but could be beneficial to the organisation and to the development of the individual.
- Secondments: the requirement may be suited to a short-term secondment opportunity through an individual[s] with some specific experience.
- University/Colleges: college placements might be a lower cost solution
- Recruitment Agencies: although sometimes costly the rates for appointing through an employment agency are invariably more cost effective than consultancy rates. There are however factors to consider such as term of employment and termination fees.

Before commencing with a consultancy arrangement, a full options appraisal should be carried out and the decision to proceed, if this is the chosen option, signed off by the senior responsible officer.

When not to use Consultants

Consultants should always be appointed for the right reasons particularly when the costs can sometimes be prohibitive. Consultants should not be used in some of the following circumstances:

- There is no clarity on what is required, they need to have a specific set of tasks and deliverables otherwise the potential for wasting money is significant
- Previous use of consultants has not yielded benefits expected. This will flag up issues with approach and involvement.
- Requiring consultants to perform tasks which are dependent upon factors and decisions outside their control
- Buying their name to give some credibility to a flawed or unfeasible project
- Using them as scapegoats to take the blame for unpopular actions
- Imagining they are miracle workers who can solve all organisational problems
- Believing they can save you the time and trouble of defining policies and objectives

Making the Case

Serious consideration should be given to appointing consultants in the first place and some thoughtful analysis up front is always good practice. Such information analysis might include:

- The purpose and scope of the work
- The results and outputs expected
- The proposed contract basis
- Estimated cost of the work
- Benefits to be derived and likelihood of being achieved
- Propose management arrangements for managing the work
- Assessment of the alternatives to the use of consultants
- An indication of any implementation consequences of the consultants' work
- Assess and declare any conflicts of interest, including any association with interested parties.

Procedure to follow when considering Consultancy

Procurement process

Procurement rules must be followed when considering Consultancy. You will need to contact the local Procurement department in the first instance to gain advice whether selection can be made from an existing Framework.

The following table summarises the minimum thresholds for quotes and competitive tendering arrangements. The total value of the contract over its entire period is the qualifying sum that should be applied (except in specific circumstances relating to aggregation and contracts of an indeterminate duration) as set out in UK Regulations.

Contract Value (excluding VAT)	Minimum Competition*
< £5,000	At discretion of DoF
£5,000 - £25,000	3 written quotations

Hywel Dda University Health Board

£25,000 - Procurement Act 2023 threshold and/or the Health Service Procurement (Provider Selection Regime Wales) 2023	4 tenders
Above Procurement Act 2023 threshold and/or the Health Service Procurement (Provider Selection Regime Wales) 2023	5 tenders
Contracts above £1m	WG approval required

*subject to existence of suitable suppliers

Approval limits

Approval requirements for consultancy expenditure are set within the Health Board Scheme of Delegation and somewhat differ to general non-pay expenditure:

	Consultancy	General Non-Pay
Executive Directors	≤ £25,000	≤ £100,000
Chief Executive Officer/ Director of Finance	≤ £25,000	≤ £500,000
CEO & DoF	-	£500,000 < X ≤ £1,000,000
CEO and Executive Team	£25,000 < X ≤ £1,000,000	£500,000 < X ≤ £1,000,000
Board (following CEO/ ET approval)	£25,000 < X ≤ £1,000,000	> £1,000,000
Welsh Government	> £1,000,000	> £1,000,000

Each Executive Director can approve Consultancy up to £25,000. Anything over £25,000 needs approval by the Board. The first step is agreement by the CEO and Executive Team. This is discharged by the Financial Control Sub Group.

In addition, scrutiny in the use of consultancy is undertaken by the Finance and Performance Committee (FPC), prior to consideration for approval by the Board.

The flowchart in [Appendix B](#) sets out the correct process to be followed.

Managers requesting the use of consultancy should plan ahead and be aware of the timescale required for approval before they can engage a consultant.

Reporting

Consultancy spend is reported annually as a matter of course through the Statutory Annual Accounts, in addition Procurement will maintain a central record of consultancy engagements which will be reported through the Finance Assurance report at the Audit and Risk Assurance Committee (ARAC).

Post review and value for money

Once the assignment is completed it is also good practice to have an exit meeting to identify issues, lessons learnt, were objectives met, what aspects were good and which bad or can be done better. This should be recorded and kept as a reference point for any future assignments with that supplier.

The project lead should ensure this is completed within 4 weeks of the end of the assignment and made available to Finance/Procurement to be reported at the next FPC meeting. The project lead should use the post project evaluation template provided by Procurement.

Monitoring

The monitoring and review of this procedure is the responsibility of the Finance Department. Reviews will be undertaken in line with the Health Board's review policy, which is every 3 years, or when changes are identified prior to the required review date.

Appendix A – Definition of Consultancy and Professional Services

Extract from the Gov.co.uk website 'Consultancy and professional services spend controls'

Consultancy services

These are services:

- that provide advice to fill a knowledge gap. This can be to identify options and recommendations, or advice to assist with implementing solutions; it will usually be related to business change or transformation, so will be time-limited
- where the individuals (consultants) delivering the service (output) will operate outside of the client organisation's structure and staffing establishment
- where payment is based on the delivery of a defined service (output). This may require a team of consultants working for an extended period of time, or could require a single consultant whose fee will be calculated based on the time taken to deliver the output
- that should not involve the individuals (consultants) working in a Business as Usual (BAU) environment (e.g. advising on legal risk or technical matters). Such contracts should usually be categorised as professional services, rather than consultancy services

Professional Services

These are services:

- that are not defined as consultancy
- that are not purely or mostly advisory (unless the advice is part of a formal report that is required to undertake business as usual activities e.g. a legal opinion or technical report)
- where the individuals delivering the service (output) will operate outside the client organisation's structure and staffing establishment
- where payment is generally based on the delivery of defined outputs or outcomes (e.g. task and finish work)
- that, as with consultancy, deliver a service (output) that may require a team working for an extended period of time, or may be provided by an individual whose fee will be calculated based on the time taken to deliver the service
- that are often delivered in a BAU environment but may relate to the delivery of a project or programme. They can be responsible for a non-BAU output (e.g. legal advisers recruited to provide advice on a specific issue)
- that seek to fill gaps to assist the procuring organisation to deliver or implement an operational service, including those that are BAU. As such, professional services should not be purely (or mostly) advisory and contracts should be defined according to the delivery of outputs and deliverables rather than the number of days of effort utilised
- where for the purposes of the control there is no need for individuals to demonstrate any specific skills, qualifications or experience
- where contractors can be paid according to time worked or for delivery of a defined output or service. This can include Managed Services

Areas where consultancy/professional services may be required

Strategy and Organisation and Change Management are likely to be consultancy but reference to the definitions should be made on a case by case basis when deciding which process to follow and advice sought from Procurement if there is any doubt.

Strategy

The provision of strategic objective advice including advice relating to corporate strategies, appraising business structures, Value for Money reviews, business performance measurement, management services, product or service design, and process and production management.

Organisation and Change Management

Provision of objective advice relating to the strategy, structure management and operations of an organisation in pursuit of its purposes and objectives. Advice related to long range planning, organisation restructure, rationalisation of services, and general business appraisal of organisations.

Finance/Audit

The provision of objective finance advice including advice relating to corporate financing structures, accountancy, control mechanisms and systems. This includes both strategic and operational finance.

Information Technology/Information Systems

The provision of objective IT/IS advice including that relating to IT/IS systems and concepts, strategic IT/IS studies and development of specific IT/IS projects. Also includes advice related to defining information needs, computer feasibility studies, making computer hardware evaluations and to e-business.

Legal

The provision of external legal advice and opinion including advice insofar as it relates to the policy formulation and strategy development particularly on commercial and contractual matters.

Property & Construction

Provision of specialist advice relating to property services and estates including portfolio management, design, planning and construction, tenure, holding and disposal strategies.

Human Resources

The provision of objective HR advice including advice on the formulation of recruitment, retention, manpower planning and HR strategies, and advice and assistance relating to the development of training and education strategies.

Technical

The provision of technical advice including the provision of technical studies, prototyping and technical demonstrators, concept development, project and task based technical advice.

Marketing & Communications

The provision of objective marketing and communications advice including advice on the development of publicising and the promotion of the Department's Business Support programmes, including advice on design, programme branding, media handling, and advertising.

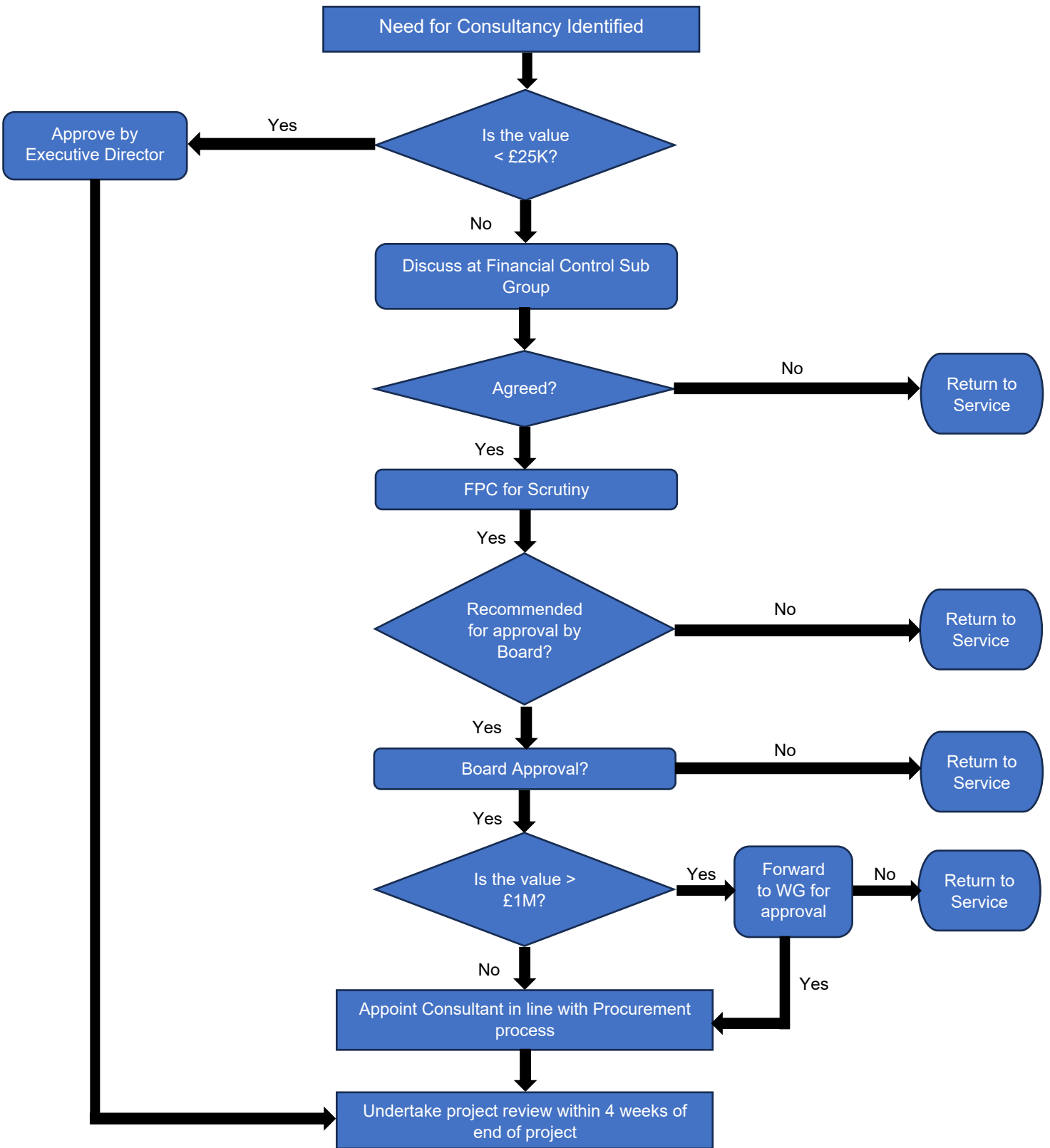
Procurement

The provision of objective procurement advice including advice in establishing procurement strategies.

Project and Programme Management (PPM)

The provision of advice relating to ongoing programmes and one-off projects. Advisory support in assessing, managing and/or mitigating the potential risks involved in a specific initiative; work to ensure benefits realisation.

Appendix B - Flowchart



Equality Impact Assessment (EqIA) Screening Template

When to complete an EqIA Screening

An EqIA Screening Template must be completed when reviewing, changing and developing procedures/ proposals/ projects/ policies. This is a first step and is used to consider whether there are any negative impacts that may arise.

Purpose of an EqIA Screening Template

The purpose of this short exercise is to ensure that you have shown appropriate due regard when considering the impact for people with protected characteristics in your decision making. The screening process is designed to help you consider the circumstances and to inform evidence-based decisions.

If the proposal is of a significant nature and it is apparent from the outset that a full EqIA will be required, then it is not necessary to complete this Screening Template, you can proceed to complete the full [EqIA](#).

If no negative impacts are identified following completion of the EqIA screening then it is not necessary to undertake a full EqIA however, the decision and justification must be clearly recorded in this document.

On completion of the Screening Template:

- Ensure that all the white boxes within the screening are completed.
- Ensure that the Procedure/ Project/ Proposal/ Policy owner has signed and dated the Screening Template.
- Send a copy of the completed template along with the related policy or project proposal to Inclusion.hdd@wales.nhs.uk for the Diversity & Inclusion Team to review.
- Each Screening Template will be reviewed by the Diversity & Inclusion Team and feedback will be provided to the Procedure/ Project/ Proposal/ Policy owner. This may include recommendations for further action to inform robust decision-making.

Support

For further support please visit the [EqIA Sharepoint](#) or contact:

Email: Inclusion.hdd@wales.nhs.uk

Tel: 01554 899055

Director and Directorate	Hywel Dda University Health Board wide
Service Area	Hywel Dda University Health Board wide

Title of Procedure, Project, Proposal, Policy being screened:	1049 – Use of Consultancy
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Description of the Procedure/ Project/ Proposal/ Policy being screened (including key aims and objectives)

The aim of this document is to provide guidance for the use of Consultancy within the Health Board. This is to minimise the risk of incurring expenditure inappropriately and ensuring best value for money is achieved.

The aim of this document will be achieved by the following objectives:

- Confirming the principles around definition of consultancy and when the Health Board would use Consultancy
- Providing clear procedures to follow when the decision has been made to use Consultancy
- Identifying the delegated limits for Consultancy spend
- Providing the reporting mechanism for Consultancy spend
- Review of outcomes

Evidence considered (including staff and population data, relevant research, expert and community knowledge etc.)

- Standing Orders Hywel Dda University Local Health
- Standing Financial Instructions
- Counter Fraud, Bribery and Corruption Policy
- Purchase to Pay Procedure
- Financial Procedures

Assess which protected characteristics will potentially be affected by the proposal in the table below (please ✓ the relevant box to confirm positive, negative or no impact).

If at any point a negative impact has been identified (actual or potential), you do not need to proceed with the completion of this form, as a full EqlA must be undertaken: [Equality Impact Assessments \(EqlAs\) \(sharepoint.com\)](https://sharepoint.com)

Age				
Is it likely to affect older and younger people in different ways or affect one age group and not another?				
Positive Impact	<input type="checkbox"/>	Negative Impact	<input type="checkbox"/>	No Impact <input checked="" type="checkbox"/>
Justification of impact identified: The aim of this document is to provide guidance for the use of Consultancy within the Health Board. It will have no impact on people of different age groups.				
Disability				
Is it likely to affect those with a physical disability, learning disability, sensory loss or impairment, mental health conditions, long-term medical conditions such as diabetes?				
Positive Impact	<input type="checkbox"/>	Negative Impact	<input type="checkbox"/>	No Impact <input checked="" type="checkbox"/>
Justification of impact identified: The aim of this document is to provide guidance for the use of Consultancy within the Health Board. It will not have an impact on those with a disability.				
Gender Reassignment				
Is it likely to affect those who either:				
<ul style="list-style-type: none"> • Have undergone, intend to undergo or are currently undergoing gender reassignment. • Do not intend to undergo medical treatment but wish to live in a different gender from their gender at birth 				
Positive Impact	<input type="checkbox"/>	Negative Impact	<input type="checkbox"/>	No Impact <input checked="" type="checkbox"/>
Justification of impact identified: The aim of this document is to provide guidance for the use of Consultancy within the Health Board. It will have no effect on individuals who have undergone gender reassignment.				
Marriage / Civil Partnership				
Under the Equality Act, the characteristic of Marriage and Civil Partnerships is only protected in the workplace/ employment.				
Is it likely to affect those who are married or in a Civil Partnership? This means someone who is legally married or in a civil partnership.				
Positive Impact	<input type="checkbox"/>	Negative Impact	<input type="checkbox"/>	No Impact <input checked="" type="checkbox"/>
Justification of impact identified: This group is in relation to workplace and employment only and is therefore not relevant for this policy.				
Pregnancy and Maternity				
Is it likely to affect those who are pregnant or have recently had a baby? Maternity covers the period of 26 weeks after having a baby, whether or not they are on Maternity Leave.				
Positive Impact	<input type="checkbox"/>	Negative Impact	<input type="checkbox"/>	No Impact <input checked="" type="checkbox"/>
Justification of impact identified: The aim of this document is to provide guidance for the use of Consultancy within the Health Board. It will have no impact on those who are pregnant or are on maternity.				
Race / Ethnicity				
Is it likely to affect people of a different race, nationality, colour, culture or ethnic origin including non-English / Welsh speakers, Gypsies/Travellers, asylum seekers and migrant workers?				
Positive Impact	<input type="checkbox"/>	Negative Impact	<input type="checkbox"/>	No Impact <input checked="" type="checkbox"/>

<p>Justification of impact identified: The aim of this document is to provide guidance for the use of Consultancy within the Health Board. It will have no impact on people of different race or ethnicity.</p>				
<p>Religion or Belief Is it likely to affect people who have a religion or belief? The term 'religion' includes a religious or philosophical belief.</p>				
Positive Impact	<input type="checkbox"/>	Negative Impact	<input type="checkbox"/>	No Impact <input checked="" type="checkbox"/>
<p>Justification of impact identified: The aim of this document is to provide guidance for the use of Consultancy within the Health Board. It will have no impact on people who have a religion or belief.</p>				
<p>Sex Is it likely to affect people who are mostly male or female. Where it applies to both equally does it affect one differently to the other?</p>				
Positive Impact	<input type="checkbox"/>	Negative Impact	<input type="checkbox"/>	No Impact <input checked="" type="checkbox"/>
<p>Justification of impact identified: The aim of this document is to provide guidance for the use of Consultancy within the Health Board. It will have no impact on one sex more than the other.</p>				
<p>Sexual Orientation Whether a person's sexual attraction is towards their own sex, the opposite sex or either.</p>				
Positive Impact	<input type="checkbox"/>	Negative Impact	<input type="checkbox"/>	No Impact <input checked="" type="checkbox"/>
<p>Justification of impact identified: The aim of this document is to provide guidance for the use of Consultancy within the Health Board. It will have no impact on individuals regardless of their sexual orientation.</p>				
<p>Armed Forces Community Consider whether this impacts on members of the Armed Forces and their families, whose health needs may be impacted long after they have left the Armed Forces and returned to civilian life. Also consider their unique experiences when accessing and using day-to-day public and private services compared to the general population. It could be through 'unfamiliarity with civilian life, or frequent moves around the country and the subsequent difficulties in maintaining support networks, for example, members of the Armed Forces can find accessing such goods and services challenging.'</p> <p>For a comprehensive guide to the Armed Forces Covenant Duty and supporting resource please see: Armed-Forces-Covenant-duty-statutory-guidance</p>				
Positive Impact	<input type="checkbox"/>	Negative Impact	<input type="checkbox"/>	No Impact <input checked="" type="checkbox"/>
<p>Justification of impact identified: The aim of this document is to provide guidance for the use of Consultancy within the Health Board. It will have no impact on members of the Armed Forces and their families.</p>				
<p>Socio Economic Duty Consider those on low income, economically inactive, unemployed or unable to work due to ill-health. Also consider people living in areas known to exhibit poor economic and/or health indicators and individuals who are unable to access services and facilities. Food / fuel poverty and personal or household debt should also be considered.</p> <p>For a comprehensive guide to the Socio-Economic Duty in Wales and supporting resources please see: more-equal-wales-socio-economic-duty</p>				
Positive Impact	<input type="checkbox"/>	Negative Impact	<input type="checkbox"/>	No Impact <input checked="" type="checkbox"/>

Justification of impact identified:
 The aim of this document is to provide guidance for the use of Consultancy within the Health Board. It will have no impact on individuals of different socio economic groups.

Welsh Language

Is it likely to impact on opportunities for people to use the Welsh language? The Welsh language should be treated no less favourably than the English language.

Positive Impact	<input type="checkbox"/>	Negative Impact	<input type="checkbox"/>	No Impact	<input checked="" type="checkbox"/>
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Justification of impact identified:
 The aim of this document is to provide guidance for the use of Consultancy within the Health Board. It will have no impact on opportunities for people to use the Welsh language.

If a negative impact has been identified, you are not required to complete this form as a full EqIA must be undertaken. A full EqIA template and guidance can be found on the following link: [Equality Impact Assessments \(EqIAs\) \(sharepoint.com\)](https://sharepoint.com)

Screening Completed by:	Name	Sarah Morgan
	Title	Finance Analyst
	Contact details	sarah.morgan16@wales.nhs.uk
	Date	25/11/2025
Screening Authorised by: (Directorate level owner of the procedures/ proposals/ projects/ policy)	Name	Timothy John
	Title	Head of Accounting & Statutory Reporting
	Contact details	Timothy.john@wales.nhs.uk
	Date	25.11.25
Guidance has been provided by Diversity & Inclusion Team:	Name	Kylie Daniels
	Title	Senior Diversity and Inclusion Officer
	Contact details	Kylie.daniels@Wales.nhs.uk
	Date	05/12/2025
Diversity and Inclusion Team additional Comments:		

Please note: The D&I team will save a copy of the completed form for reference. If any changes are made after the date of review, it is the directorate’s responsibility to update the EqIA and inform the D&I team.