



EQUALITY SCREENING TEMPLATE

See [Guidance Notes](#) (POL:PP:032) for further information on the 'why' 'what' 'when', and 'who' in relation to screening, for background information on the relevant legislation and for help in answering the questions on this template .

(1) INFORMATION ABOUT THE POLICY OR DECISION

1.1 Title of policy (incl. doc. reference number) or decision :

Flexible Retirement Guidance for HSC Pension Scheme Members and associated Frequently Asked Questions (FAQs)

1.2 Description of policy or decision

- **what is it trying to achieve? (aims and objectives)**
- **how will this be achieved? (key elements)**
- **what are the key constraints? (for example financial, legislative or other)**

This guidance and FAQs support employees to access flexible working later in their careers, this guidance has been developed to provide an overview of the options available to employees who are members of the HSC Pension Scheme. Eligible employees can apply to retire flexibly using the application process set out in this guidance. Through the application of this guidance, managers will consider all requests for flexible retirement fairly and consistently, with due consideration given to service needs.

The Guidance and FAQs:

- Enable employees to understand the range of flexible retirement available to access their pension and combine this with flexible working.
- Enable managers to understand, promote and discuss flexible retirement options with employees.
- Sets out the expectations and requirements of employees and managers in pursuing and considering applications to access one of the flexible retirement options.
- Seeks to ensure that employees later in their careers feel valued, rewarded and recognised for their experience, service and commitment.



1.3 Main stakeholders affected (internal and external)

For example staff, actual or potential service users, other public sector organisations, voluntary and community groups, trade unions or professional organisations or private sector organisations or others

This policy impacts NIBTS staff who are members of the HSC Pension Scheme and nearing retirement age.

1.4 Other policies or decisions with a bearing on this policy or decision

- **what are they?**
- **who owns them?**

Changes to the HSC Pension Scheme regulations were introduced by the Department of Health with effect from 01 April 2024. This Guidance has been developed regionally to support Health and Social Care NI organisations, documents with bearing on this also include:

- NHS Terms and Conditions of Service for Agenda for Change, Medical and Dental and Senior Executives
- Flexible Working Policies
- Equality, Diversity & Inclusion Policies



(2) CONSIDERATION OF EQUALITY AND GOOD RELATIONS ISSUES AND EVIDENCE USED

2.1 Data gathering

What information did you use to inform this equality screening? For example previous consultations, statistics, research, Equality Impact Assessments (EQIAs), complaints. Provide details of how you involved stakeholders, views of colleagues, service users, staff side or other stakeholders.

This policy has been developed in line with LRA and ECNI best practice recommendations on flexible working including the LRA publication 'Flexible Working – The Right to Request and Duty to Consider' and the ECNI publication 'A Unified Guide to Promoting Equality of Opportunity in the Workplace'.

Guidance from NHS Employers regarding flexible retirement was also considered.

Regional guidance developed in conjunction with trade unions.

NIBTS Staff Data

2.2 Quantitative Data

Who is affected by the policy or decision? Please provide a statistical profile. Note if policy affects both staff and service users, please provide profile for both.

Category	<i>What is the makeup of the affected group? (%) Are there any issues or problems? For example, a lower uptake that needs to be addressed or greater involvement of a particular group?</i>														
Gender	NIBTS Staff Data: 67% female, 33% male														
Age	NIBTS Staff Data: <table border="1"> <thead> <tr> <th>Age Group</th> <th>%</th> </tr> </thead> <tbody> <tr> <td>16-24</td> <td>5%</td> </tr> <tr> <td>25-34</td> <td>18%</td> </tr> <tr> <td>35-44</td> <td>22%</td> </tr> <tr> <td>45-54</td> <td>21%</td> </tr> <tr> <td>55-64</td> <td>29%</td> </tr> <tr> <td>>=65</td> <td>5%</td> </tr> </tbody> </table>	Age Group	%	16-24	5%	25-34	18%	35-44	22%	45-54	21%	55-64	29%	>=65	5%
Age Group	%														
16-24	5%														
25-34	18%														
35-44	22%														
45-54	21%														
55-64	29%														
>=65	5%														
Religion	NIBTS Staff Data:														



	<p>39% Catholic 42% Protestant 10% Neither 9% Not determined</p>
Political Opinion	<p>Staff Data: 9% Broadly Nationalist 9% Broadly Unionist 16% Other 66% No answer</p>
Marital Status	<p>Staff Data: 19% Unknown 24% Single 53.5% Married / Civil Partnership 2% Divorced 0.5% Widowed 0.5% Separated 0.5% Other</p>
Dependent Status	<p>Staff Data: 28% Staff with dependents 30% Staff without dependants 42% Not assigned</p>
Disability	<p>Staff Data: 55% No Disability 2% With Disability 43% Not Assigned</p>
Ethnicity	<p>Staff Data: 64.5% White 0.5% Pakistani 1% Other 34% Not Assigned</p>
Sexual Orientation	<p>Staff Data: 50% Someone of the opposite sex 3% Someone of the same sex 0.5% Both sexes 3% Do not wish to answer 43.5% Not assigned</p>



2.3 Qualitative Data

What are the different needs, experiences and priorities of each of the categories in relation to this policy or decision and what equality issues emerge from this? Note if policy affects both staff and service users, please discuss issues for both.

Category	Needs and Experiences
Gender	There is no data to suggest that the needs and experiences of staff differ on the basis of gender.
Age	Positive impact for those over 50, as provides options for flexible retirement. These address previous inequalities for those in the 1995 pension scheme who could not avail of partial retirement, who tend to be in the older age brackets.
Religion	There is no data to suggest that the needs and experiences of staff differ on the basis of religion.
Political Opinion	There is no data to suggest that the needs and experiences of staff differ on the basis of political opinion.
Marital Status	There is no data to suggest that the needs and experiences of staff differ on the basis of marital status.
Dependent Status	There is no data to suggest that the needs and experiences of staff differ on the basis of dependent status.
Disability	There is no data to suggest that the needs and experiences of staff differ on the basis of disability. Issues relating to accessibility information for people with disabilities are considered in our Accessible Formats Policy.
Ethnicity	There is no data to suggest that the needs and experiences of staff differ on the basis of ethnicity. Issues relating to accessible information for people whose first language is not English are considered in our Accessible Formats Policy.
Sexual Orientation	There is no data to suggest that the needs and experiences of staff differ on the basis of sexual orientation.



2.4 Multiple Identities

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.

2.5 Making Changes

Based on the equality issues you identified in 2.2 and 2.3, what changes did you make or do you intend to make in relation to the policy or decision in order to promote equality of opportunity?

<i>In developing the policy or decision what did you do or change to address the equality issues you identified?</i>	<i>What do you intend to do in future to address the equality issues you identified?</i>
<p>Age:</p> <p>This policy may have a positive impact on this protected characteristic as employees/ workers can apply to retire flexibly i.e. when and how they retire when they reach the age at which they can retire.</p>	<p>Age:</p> <p>This policy may have a positive impact on this protected characteristic as employees/ workers can apply to retire flexibly i.e. when and how they retire when they reach the age at which they can retire.</p>



2.6 Good Relations

What changes to the policy or decision – if any – or what additional measures would you suggest to ensure that it promotes good relations? (refer to guidance notes for guidance on impact)

<i>Group</i>	<i>Impact</i>	<i>Suggestions</i>
Religion		
Political Opinion		
Ethnicity		

(3) SHOULD THE POLICY OR DECISION BE SUBJECT TO A FULL EQUALITY IMPACT ASSESSMENT?

A full equality impact assessment (EQIA) is usually confined to those policies or decisions considered to have major implications for equality of opportunity.

How would you categorise the impacts of this decision or policy? (refer to guidance notes for guidance on impact)

Do you consider that this policy or decision needs to be subjected to a full equality impact assessment?

Please tick:

Major impact	<input type="checkbox"/>
Minor impact	<input type="checkbox"/>
No further impact	<input checked="" type="checkbox"/>

Please tick:

Yes	<input type="checkbox"/>
No	<input checked="" type="checkbox"/>



Please give reasons for your decisions.

This policy has been developed in line with legislation and best practice.

Having screened these documents and put in place mitigation for any impacts identified it is not thought that subjecting the policy / decision to an EQIA will further identify opportunities to promote equality of opportunity.



(4) CONSIDERATION OF DISABILITY DUTIES

4.1 In what ways does the policy or decision encourage disabled people to participate in public life and what else could you do to do so?

<i>How does the policy or decision currently encourage disabled people to participate in public life?</i>	<i>What else could you do to encourage disabled people to participate in public life?</i>
<p>Provides and promotes flexible retirement opportunities for disabled staff</p>	

4.2 In what ways does the policy or decision promote positive attitudes towards disabled people and what else could you do to do so?

<i>How does the policy or decision currently promote positive attitudes towards disabled people?</i>	<i>What else could you do to promote positive attitudes towards disabled people?</i>



(5) CONSIDERATION OF HUMAN RIGHTS

5.1 Does the policy or decision affect anyone's Human Rights? Complete for each of the articles

ARTICLE	Yes/No
Article 2 – Right to life	No
Article 3 – Right to freedom from torture, inhuman or degrading treatment or punishment	No
Article 4 – Right to freedom from slavery, servitude & forced or compulsory labour	No
Article 5 – Right to liberty & security of person	No
Article 6 – Right to a fair & public trial within a reasonable time	No
Article 7 – Right to freedom from retrospective criminal law & no punishment without law	No
Article 8 – Right to respect for private & family life, home and correspondence.	No
Article 9 – Right to freedom of thought, conscience & religion	No
Article 10 – Right to freedom of expression	No
Article 11 – Right to freedom of assembly & association	No
Article 12 – Right to marry & found a family	No
Article 14 – Prohibition of discrimination in the enjoyment of the convention rights	No
1 st protocol Article 1 – Right to a peaceful enjoyment of possessions & protection of property	No
1 st protocol Article 2 – Right of access to education	No

*If you have answered no to all of the above please move on to **Question 6** on monitoring*



5.2 If you have answered yes to any of the Articles in 5.1, does the policy or decision interfere with any of these rights? If so, what is the interference and who does it impact upon?

List the Article Number	Interfered with? Yes/No	What is the interference and who does it impact upon?	Does this raise legal issues?*
			Yes/No

** It is important to speak to your line manager on this and if necessary seek legal opinion to clarify this*

5.3 Outline any actions which could be taken to promote or raise awareness of human rights or to ensure compliance with the legislation in relation to the policy or decision.



(6) MONITORING

6.1 What data will you collect in the future in order to monitor the effect of the policy or decision on any of the categories (for equality of opportunity and good relations, disability duties and human rights)?

Equality & Good Relations	Disability Duties	Human Rights

Approved Lead Officer: Rumy Collins
 Position: HR & Training Manager
 Date: 28.11.2024
 Policy/Decision Screened by: Rumy Collins

Please note that having completed the screening you are required by statute to publish the completed screening template, as per NIBTS equality scheme. If a consultee, including the Equality Commission, raises a concern about a screening decision based on supporting evidence, you will need to review the screening decision.

Please forward a copy of the completed screening template and policy/strategy to the HR Office for publishing.

If you require this document in an alternative format (such as large print, Braille, disk, audio file, audio cassette, Easy Read or in minority languages to meet the needs of those not fluent in English) please contact a member of the HR department.