

Appendix 7

Equality Impact Assessment Summary

Policy /Service: Retirement Policy

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Background

Ashford and St Peters is an acute trust employing 3,466 staff based in the Southeast Coast SHA.

The Trust understands that staff work best for patients when they can strike a healthy balance between work and other aspects of their life outside work. The Retirement Policy forms part of the Trust's approach to work life balance and Improving Working Lives.

The aims of the policy are to

- To ensure that staff make the transition from work to retirement as smoothly as possible
- To enable staff to retire at an age which is appropriate to their circumstances and capabilities
- To ensure that staff are aware of the default retirement age of 65.

Retirement involves a significant change in lifestyle. Inevitably people will have thoughts about retirement well before they get to detailed planning. A large part of planning for retirement involves financial planning. Details of the NHS Pensions Scheme are available to staff when they commence employment in the Trust. Pensions Awareness sessions and Pre-Retirement courses are available.

The Trust operates a policy on Flexibility in Employment which applies to all staff in the Trust and there are a number of retirement options available to staff from age fifty (based on the current pension scheme). Including;

- Winding down
- Stepping down
- Retire and come back
- Working beyond the default retirement age (65).

Details are available in the full policy.

Methodology

The policy has been amended to take into account the default retirement age of 65. A number of groups were involved in the process including Human Resource Professionals, Staff Side groups and the Equality and Diversity Steering Group.

Key Findings

A summary of the age

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demographics is as follows:		
Age 16 -20	0.98%	
21-25	8.58%	
26-30	12.19	
31-35	14.27	
36-40	12.89	
41-45	12.34	
46-50	13.37	
51-55	11.04	
56-60	8.50	
61-65	4.13	
66-70	1.29	
71+	0.4	

Managers will arrange to meet with staff around the date of their 64th birthday to informally discuss their retirement plans and inform them of the policy and process that will be followed. These staff will receive a letter no later than 6 months before their 65th birthday informing them that their employment will terminate on the date of that birthday and advising them of the process for requesting the right to work beyond the default retirement age. Where staff have reached the age of 64.5 and above when the policy is implemented the notice period will begin immediately.

In relation to recruitment applicants will be advised on NHS Jobs of the application of the default retirement age and that they should not apply for posts if they are age 64 plus (in accordance with the policy).

The introduction of the default retirement age of 65 may be considered to adversely impact on employment opportunities in the Trust for older workers.

Conclusion

As the default retirement age of 65 is being introduced to bring the Trust into line with current legislation this has been objectively justified. The Trusts Equality and Diversity Steering Group has approved the decision and the policy has been ratified by the Trust Board.

Recommendations

There have been no changes to the policy as a result of this impact assessment but it is recommended that the policy be kept under annual review to take into account any future changes to current legislation.

Guidance on Equalities Groups

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<p>Race and Ethnic origin (includes gypsies and travellers) (consider communication, access to information on services and employment, and ease of access to services and employment)</p>	<p>Religion or belief (include dress, individual care needs, family relationships, dietary requirements and spiritual needs for consideration)</p>
<p>Disability (consider communication issues, access to employment and services, whether individual care needs are being met and whether the policy promotes the involvement of disabled people)</p>	<p>Sexual orientation including lesbian, gay and bisexual people (consider whether the policy/service promotes a culture of openness and takes account of individual needs)</p>
<p>Gender (consider care needs and employment issues, identify and remove or justify terms which are gender specific)</p>	<p>Age (consider any barriers to accessing services or employment, identify and remove or justify terms which could be ageist, for example, using titles of senior or junior)</p>
<p>Culture (consider dietary requirements, family relationships and individual care needs)</p>	<p>Social class (consider ability to access services and information, for example, is information provided in plain English?)</p>