

## INITIAL EQUALITY IMPACT ASSESSMENT PRO FORMA

Section: HROD	Names of those undertaking assessment: Jane Jenkinson, Joyce Slater, Mike Robinson	
Name of Policy to be assessed: New Look Pension Scheme 2008	Date of Assessment: 23 <sup>rd</sup> January 2008	Is this a new or existing policy?: NEW
<p>1. Briefly describe the aims, objectives and purpose of the policy: Clarify the Councils discretions and practical arrangements relating to the range of pension release options under the new 2008 regulations.</p>		
<p>2. What are the key performance indicators? BVPI ill-health retirements BVPI early retirements</p>		
<p>3. Who will be affected by this policy? Employees who are members of the local government pension scheme Future employees</p>		
<p>4. Who is intended to benefit from this policy and in what way As 3</p>		
<p>5. Are there any other organisations involved in the delivery of the service? Pension scheme administrators Occupational health service provider</p>		
<p>6. What outcomes are required from this policy and for whom? Statement of the councils discretions Statement of the procedure to enable a pension release Guidance on the application of the pension scheme specific to SKDC All stakeholders listed in 8</p>		
<p>7. What factors/forces could contribute/detract from the outcomes? Changes in the regulations &amp; related guidance</p>		
<p>8. Who are the main stakeholders in relation to the policy? Employees Pension fund administrators Occupational health Trade unions The Council – elected members S151 officer Monitoring officer Chief executive</p>		
<p>9. Who implements the policy, and who is responsible for the policy? Service manager Human resources and organizational development HR &amp; OD S151 officer Monitoring officer</p>		

Chief executive
10. Are there concerns that the policy <u>could</u> have a differential impact on different racial groups? If yes, please explain. What existing evidence (either presumed or otherwise) do you have for this?  No because the criteria relate to pensionable service & financial viability
11. Are there concerns that the policy <u>could</u> have a differential impact on men and women? If yes, please explain. What existing evidence (either presumed or otherwise) do you have for this?  Regulations base pension benefits on pensionable contributions. There is a difference in length of service between genders, but this is not attributable to this policy. Both genders have their benefits based on actual pay and pensionable contributions. Rule of 85 has been removed, which used to impact adversely on women who were less able to accrue high levels of service.
12. Are there concerns that the policy <u>could</u> have a differential impact on disabled people? If yes, please explain. What existing evidence (either presumed or otherwise) do you have for this?  III health retirement options are more supportive of people with a disability than previous schemes.
13. Are there concerns that the policy could have a differential impact on the grounds of sexual orientation? If yes, please explain. What existing evidence (either presumed or otherwise) do you have for this? No
14. Are there concerns that the policy <u>could</u> have a differential impact on the grounds of age? If yes, please explain. What existing evidence (either presumed or otherwise) do you have for this? Yes. The regulations have different pension release options related to age.
15. Are there concerns that the policy <u>could</u> have a differential impact on the grounds of religious belief? If yes, please explain. What existing evidence (either presumed or otherwise) do you have for this? No.
16. Are there concerns that the policy <u>could</u> have a differential impact on any other groups of people eg those with dependants/caring responsibilities, those with an offending past, those with learning difficulties, transgendered or transsexual people. If yes, please explain. What existing evidence (either presumed or otherwise) do you have for this? No
17. Are there any obvious barriers to accessing the service eg language, physical access? No.
18. Where do you think improvements could be made? Receipt of guidance from Local Government employers and the pension fund administrators Eg flexible retirement III health retirement
19. Are there any unmet needs or requirements that can be identified that affect specific groups. If yes, please give details. No

20. Is there a complaints system? Yes grievance procedure & to an independent person appointed by the Council, normally a member of the strategic management team.
21. Do we monitor complaints by race, gender, disability, age, sexual orientation, religious belief? Yes
22. Do we have feedback from managers or frontline staff? N/A policy is purely driven by the new regulations
23. Is there any feedback from voluntary/community organisations? N/A
24. Is there any research or models of practice that may inform our view? No – policy has been reviewed by our pension administrators as technically correct
25. Could the differential impact identified in 8 – 16 amount to there being unlawful discrimination in respect of this policy? Potentially age but the challenge is to the pension legislation that defines the policy.
26. Could the differential impact identified in 8-16 amount to there being the potential for adverse impact in this policy?  No because the policy does not treat people differently other than as required by the regulations and because the determination of an early release of pension is determined by the efficiency considerations not personal attributes
27. Can this adverse impact be justified on the grounds of promoting equality of opportunity for one group? Or any other reason? No
28. Should the policy proceed to a full impact assessment? No
29. Date on which Full assessment to be completed by N/A
Signed (Lead Officer): Joyce Slater... ..... Date: .....24 <sup>th</sup> January 2008 .....