

Equality Impact Assessment

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| Title of the policy/report /strategy/service | Pensions & Retirement Policy |
| Date | 18 th March 2013 |
| Lead Officer | Elaine Griffin |
| Who else is involved in undertaking this assessment? | Chris Morris Rebecca Jenner |

Step 1 – Overview of policy/function being assessed

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| A. Outline: What is the purpose of this policy? (specify aims and objectives) |
| The purpose of the policy is to set out information regarding eligibility criteria for the LGPS, auto-enrolment, pension contributions, younger leavers, normal retirements, early retirements and flexible retirements and to signpost employees to further information from the pension provider. |
| B. What specific groups are the policy designed to affect/impact? |
| The policy impacts all staff who are members of the LGPS and all new starters who are subject to auto-enrolment. |
| C. Which groups have been consulted as part of the creation or review of the policy? |
| Human Resources |

Step 2 – What we already know and where there are gaps

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| A. List any existing information/data you have/monitor about different diverse groups in relation to this policy? Such as in relation to ethnicity, religion, sexual orientation, disability, age, gender, transgender etc. |
| <p>Data/information such as:</p> <ul style="list-style-type: none"> ▪ Consultation ▪ Previous Equality Impact Assessments ▪ Demographic information ▪ Anecdotal and other evidence |
| No equality data is currently gathered in respect of membership of the LGPS although a significant proportion of HDC staff are members and this is set to increase due to auto-enrolment. |
| B. What does this information / data tell you about diverse group? If you do not hold or have access to any data/information on diverse groups, what do you need to begin collating / monitoring? (please list) |
| Options for the collation of data are to be explored with the Equality Officer but could include the inclusion of a question relating to membership of the LGPS in the annual anonymous data capture exercise. |

Step 3 – Do we need to seek the views of others? If so, who?

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| A. In light of the answers you have given in step 2, do you need to consult with specific groups to identify needs / issues? If not please explain why. |
| HDC must liaise with the pension scheme provider to ensure that the policy is re-written correctly to |

incorporate recent changes to the scheme. It must also liaise with Unison regarding the policy content and the Equality Officer regarding the collation of equality data.

Step 4 – Assessing the impacts

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| | In light of any data/consultation/information and your own knowledge and awareness, please identify whether the policy has a positive or negative impact on the groups specified and provide an explanation for your decision. (please refer to the general duties on the front page) |
| A. Age | No equality data is available. There are age related triggers within the policy, however these are justifiable in line with legislation and the terms of the LGPS. |
| B. Disability (physical, visual, hearing, learning disabilities, mental health) | No equality data is available in respect of membership of the scheme. However, the policy is neutral in respect of disability status. The HR Department will work with the ICT and Communications Departments and Equality Officer in order to improve the online accessibility of the policy and procedure. Hard copies are available via the HR department. |
| C. Gender / Sex | No equality data is available in respect of membership of the scheme. However, the policy reflects differences in the application of the pension in accordance with the LGPS. |
| D. Religious Belief | No equality data is available in respect of membership of the scheme. However, the policy is neutral in respect of religious belief. |
| E. Racial Group | No equality data is available in respect of membership of the scheme. However, the policy is neutral in respect of ethnicity. |
| F. Sexual Orientation | No equality data is available in respect of membership of the scheme. However, the policy is neutral in respect of sexual orientation. |
| G. Transgender | No equality data is available in respect of membership of the scheme. However, the policy is neutral in respect of transgender status. |
| H. Other protected groups (pregnancy & maternity, marriage & civil partnership) | The LGPS makes provision for those on sick, maternity and paternity leave. |
| I. Other socially excluded groups (low literacy, priority neighbourhoods, socio-economic, etc) | No employee data is kept regarding socio-economic status of employees but as HDCs commitment to equality will be observed during the implementation of the policy and all employees should be treated fairly and reasonable additional support offered if required. |
| J. All | Followed correctly, the policy should not treat any employee less favourably than another. |

Step 5 – Action Plan

| Please include any identified concerns/actions/issues in this action plan: The issues identified should inform your Service Plan and, if appropriate, your Consultation Plan | | | |
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| Question Number (Ref) | Action | Responsible Officer | Target Date |
| 3a | To liaise with the pension scheme provider to re-write the policy in line with current legislation | EYG | 31/03/14 |
| 3a | To consult with Unison | EYG | 31/03/14 |
| 3a | To discuss and agree with the Equalities Officer the introduction of equality monitoring in respect of members of the LGPS | EYG | 31/03/14 |

Step 6 – Who needs to know about the outcomes of this assessment and how will they be informed

| | Who needs to know (Please tick) | How they will be informed (we have a legal duty to publish EIA's) |
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| Employees | ✓ | The EIA and the policy will be published on the intranet. |
| Service users | ✓ | The EIA will be published on the internet. |
| Partners and stakeholders | ✓ | The EIA will be published on the internet. |
| Others | ✓ | The EIA will be published on the internet. |
| To ensure ease of access, what other communication needs/concerns are there? | ✓ | Hard copies of the EIA and policy and procedure will be available from the Human Resources Department. |

Step 7 – Conclusion (to be completed and signed by the Service head)

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| Please delete as appropriate |
| I agree with this assessment / action plan |
| If <i>disagree</i>, state action/s required, reasons and details of who is to carry them out with timescales: N/A |
| Signed (Service Head): Kate Frow – Human Resources Manager |
| Date: 30 th April 2013 |

Please send completed & signed assessment to the Equality and Diversity officer.