

Retirement Policy

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21/08/20	6	Deborah Booth – HR Manager Elaine Hindle – Trust Pension Lead	Updated break in service from 2 weeks to 4 weeks aligned with Good Work Plan guidance. Updated contact details for NHSBSA (Pensions Agency) Removed appendices Authorisation required for Medical and Dental employees Update following the McCloud judgement

Consultation / Acknowledgements with Stakeholders		
Name	Designation	Date Response Received

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1 Introduction / Purpose

This document outlines the Trust policy on various aspects of retirement from the service.

2 General Principles / Target Audience

This policy will apply to all staff employed under a contract of service by the Blackpool Teaching Hospitals NHS Foundation Trust.

3 Definitions and Abbreviations

NHS	National Health Service
Commutation	Conversion of total pension benefits to a lump sum in the case of Terminal Illness. Can only be approved by the NHS Pension Providers.
NPA	Normal Pension Age

4 Policy

4.1 Introduction

The organisation is committed to equal opportunities for all its employees. The organisation recognises the contributions of a diverse workforce, including the skills and experience of older employees. It believes that employees should wherever possible, be permitted to continue working for as long as they wish to do so. The organisation operates a flexible retirement policy and employees may voluntarily retire at a time of their choosing (subject to 4.2. below).

4.2 Retirement Age

The Trust does not operate a general policy for compulsory retirement. Employees will continue to be employed under their existing terms and conditions of employment and where possible continue to contribute to the Pension Scheme regardless of age.

Staff are requested to provide a minimum of 4 months' notice of their intended retirement date, where possible to enable timely completion for their NHS Pension to be finalised.

Staff may retire and receive their Pension before the age of 65 years at a date dependent upon their age, service, and Pension Scheme membership. Persons wishing to exercise "early retirement" choice must discuss with their Line Manager in the first instance and they must give Payroll at least notice of 4 months to progress through the relevant procedure. (See flowchart within Retirement Guidance, Appendix 4).

Where there is genuine concern regarding an employee's medical ability to work this must be fully supported by an Occupational Health assessment and must give a clear indication of the connection between an employee's current health condition and their current job role. Such a concern should be dealt with in line with the Trust's Attendance Management Policy to discuss and review their ability to perform their duties within their role and the opportunity to redeployment for those who are willing to remain in work.

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Where staff are working beyond their pensionable age (dependant on scheme), managers may have annual workplace discussion with them regarding their thoughts on retirement, usually within their appraisal. This will enable the Trust to review staffing issues, budgets, and plan accordingly.

4.3 Flexible Retirement

Employees can request Flexible Retirement which offers several options as outlined below. Flexible Retirement offers employees greater choice and, in some cases, offers employees the opportunity to take advantage of their Pension in addition to the remuneration they would receive from working. Within the rules of the NHS Pension Scheme, there are a range of alternatives available for people as they approach retirement.

Flexible retirement provides many benefits to the Trust:

- Creates a richer staff resource – full time, part time or available in periods of peak activity.
- Enables better utilisation and transfer of skills and knowledge from experienced staff.
- Improves morale among staff able to take advantage of retirement options.

Flexible retirement provides many benefits for Employees:

- Increased income compared to conventional retirement.
- Ability to 'ease down' into retirement.
- Options for part time, full time or limited period working after retirement.

Anyone wishing to apply for flexible retirement should do so in writing and by completing a Flexible Retirement Request Form (Appendix 5) to their line manager. All Medical and Dental employees should also seek authorisation from their Head of Department or Divisional Director in their application. A meeting will be arranged within 28 days of receipt of the written request for flexible retirement between the Employee (making the request) and the Line Manager. The Employee has the right to be accompanied at this meeting by a Trade Union Representative or a Work Colleague. This meeting will allow for a full discussion and wherever possible agree the following:

- The reasons for the request.
- Discuss any concerns connected with the request considering any impact on operational needs / delivery of the service.
- To discuss any other flexible retirement options that may be available.

The Trust will make every reasonable attempt to accommodate requests for Flexible Retirement to support health and wellbeing in a consistent, fair, and equitable manner however the Trust reserves the right to refuse requests on the grounds of:

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- Economic reasons associated with a changing role.
- Planned structural changes including reorganisation of the work and the department.
- Genuine medical reasons which can only be supported by evidence from Occupational Health (see 4.2). Concerns must be discussed during the initial meeting with the Employee and a medical assessment arranged as soon as possible thereafter.

Where a request is refused, the Employee has the right to appeal within 14 days of the date of receipt of the letter confirming the rationale for the refusal.

The Flexible Retirement options available are:

4.3.1 Wind Down

Delaying retirement and move into part-time work in ways that have minimal effects on existing pension benefits.

There is a general misconception that moving into part time work in the years leading up to retirement may reduce the eventual pension. In fact, pension benefits for part time staff are calculated on the whole-time equivalent pay, so moving from full time to part time work but within the same grade, rather than retiring, will have little effect on the pension that is ultimately received. A difference may occur where special allowances, for example a night shift allowance, are not applicable in the new area of working. If this does occur, you should seek further advice from the Trusts Pension Lead. Retirement pension is based on total service at retirement (part time and whole-time service is added together) and whole-time pensionable pay at retirement. Further information is available from the Pension Agency website.

Staff who delay retirement and continue to work part-time carry on building up pension entitlement. For example, someone working 4 years at 50% of full time will be credited with 2 extra years of contribution to the scheme.

4.3.2 Step Down

Employees may find that they want to give up the pressure and responsibilities of their current role but do not want to leave work altogether. If aged under 50, staff can choose to step down to a lower graded role and protect their pension benefits, however this option may only be taken once whilst under the age of 50. If the employee is over 50, the salary reduction undertaken during step down must be more than 10% of previous salary to have their pension protected at the previous pensionable pay (prior to step down).

Dependent upon which NHS Pension Scheme the staff member is in there can be an effect on their ability to protect previous Pensionable pay. Further advice should be sought from the Pensions Agency website prior to considering this option.

However, by agreement with the Trust, an employee can still step down into a lower paid role if they chose to.

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The key aspects of this option are the availability of a suitable role and the formal agreement with the employer. Consideration of acceptance of this arrangement will be dependent upon whether the employee has critical skills and experience that can be transferred to the new role.

4.3.3 Retire and Come Back

Retire, receive a pension and resume working. Circumstances where this may be appropriate include:

- Difficulty in finding replacement staff.
- Assisting in organisational change plans.
- Training of staff or specific project requiring the Employees specialised skill or knowledge.
- Where casual staff are regularly required.

Once employees have retired from the 1995 NHS Pension Scheme, they will no longer be able to contribute to the NHS Pension Scheme, however they are eligible to join the Trusts' alternative scheme National Employment Savings Trust (NEST). Information can be found at www.nestpensions.org.uk.

Members of the 2008 and 2015 schemes can chose to re-join a scheme membership. Advice must be taken from the Trust Pension Lead or the Pension Agency website. Before any decisions are made, employees may choose to come back to a regular role or be available for temporary periods of employment during peak periods. All Medical and Dental employees should also seek authorisation from their Head of Department or Divisional Director in their application

There are specific conditions attached to this option and they are as follows:

- Retirees who have Special Class / Mental Health Officer status with the ability to retire from the age of 55, have a restriction on their earnings when they return to work between the ages of 55 and 60. (Those who take their Pension voluntarily early receive a reduced Pension and are excluded from this condition). In all cases, staff should seek advice from the Pensions Agency and/or the Trust's Pension Lead. In the case of an overpayment, retirees may have their pension reduced or suspended until they reach the age of 60. If this happens retirees may have to pay the money back.
- There must be a gap of at least 2 weeks between retirement and return to work.
- Where individuals opt to take their retirement pension upon leaving and then come back, their service re-starts from the date of return. Previous NHS service will therefore not count as reckonable or aggregate service in line with Agenda for Change / Medical and Dental Terms and Conditions for taking your Pension.
- Annual leave -On returning to NHS employment, a previous period or periods of NHS service will be counted towards the employee's entitlement to annual leave.

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- Sickness entitlements - On returning to NHS employment, a previous period or periods of NHS service will be counted towards the employee's entitlement to sickness absence, where there has been a break or breaks in service of 12 months or less.
- It is the staff members' responsibility to check with the NHS Pension Agency via nhsbsa.pensionsmember@nhsbsa.nhs.uk to confirm how much they can earn on return to NHS employment, this should be gained in writing.

Any NHS earnings will not affect the retiree's pension where:

- The voluntary early retirement or deferred pension has been reduced because of early payment; or
- They are receiving an early retirement pension that has not been enhanced following redundancy (this does not include early retirement in the interests of the efficiency of the service).

4.3.4 On-Call Arrangements

In the case of Medical and Dental staff a discussion must take place with the departmental manager to determine arrangements for participation in the department on-call arrangements following retirement and return to work. (Refer to section 4.3)

Where there is a request to return without on-call it is essential that the department manager discusses the implications with the whole team and where this is agreed, job plans are amended accordingly.

Where this is not agreed the member of staff must be notified as soon as possible. The outcome of the meeting must be documented and signed by the staff member and the line manager and kept in the staff member's personal file.

4.3.5 Draw Down

In the 2008 and 2015 Scheme, draw down allows members to take part of their Pension benefits while continuing in NHS employment.

For this option, an employee must reduce their annual salary by at least 10%.

4.3.6 Late Retirement after Normal Pension Age

In the 2008 and 2015 Scheme a member can choose to retire later than their Normal Pension Age (NPA). Pension and lump sum will be increased to take into account that it is being paid later than your Normal Pension Age.

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4.3.7 Early Retirement Reduced Buy out

In the 2015 scheme, members or employers can pay additional contributions to reduce the reduction that would be applied to their pension should they retire before their NPA.

For example: If your Normal Pension Age (NPA) is 67 years old, and you wish to retire before this (at 65), then there is an option to pay more into the scheme to buy out the reduction that would apply if you claim your NHS Pension before your Normal Pension Age (NPA).

For further information employees can access the NHS Pension Agency website at <https://www.nhsbsa.nhs.uk/nhs-pensions> for all up to date information on Pensions.

4.4 Ill Health Retirement

For those in the NHS Pension Scheme, provided you have at least two years membership of the scheme and become too ill to work in your present job you may be able to retire early and take your pension benefits. There are two tiers of Ill Health Retirement and the benefits you will get will depend on whether you are capable of undertaking employment elsewhere. The minimum pension age does not apply in the case of ill health retirement.

In the event that an employee should wish to apply for Ill Health retirement you should contact the Trust Pension Lead for an estimate for anticipated benefits. By this stage, you should have been having discussions with your line manager (with Union representation, if applicable), Occupational Health and Human Resources to reach this decision. The decision to award an Ill Health Pension is made by the NHS Pensions Agency Assessors, not the Trust. However, where it is determined that you are no longer capable of working for the Trust and other options have been explored then your employment may still be terminated regardless of obtaining access to your Pension.

In the case of a terminal illness, there is an option where benefits may be paid sooner as a lump sum (commutation).

4.5 Voluntary Early Retirement

The earliest age you can apply for retirement will depend upon the Pension Scheme you belong to and when you commenced pensionable employment. Choosing to take early retirement will mean that your benefits are reduced on a sliding scale dependent upon the scheme you are in and your age when you retire. The earliest age that any NHS Employee can gain access to their pension is 50, however in the 2008 pension scheme, the earliest age is 55. There may be some staff in the 1995 scheme who can take their pension benefits at 55 without reduction, this does not apply in all cases. Further details of this may be obtained from the Trust Pension Lead or the NHS Pension Agency.

4.6 Request for Pension Forecast

Employees may request a forecast of their Pension by accessing your Total Reward Statement (TRS). TRS Statements can be accessed through ESR Self Service. If one is not available, contact the Trust Pension Lead in the first instance.

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Whilst the NHS Pension Scheme is changing following the McCloud / Sergeant Judgement – there is information regularly updated on the NHS Pensions website – with Comms coming from the Trust within the final months leading up to 31/3/2022.

The Pensions website at www.nhsbsa.nhs.uk/pensions also has all this information

4.7 Preparation for Retirement

The Trust understands that Employees who retire may require support in making the adjustment from a working to a non-working life and therefore provides initiatives to help employees make positive retirement plans. See section 4.7.1 below.

4.7.1 Preparation for Retirement Training Course

All retiring Employees are urged to attend the Trust internal training course offering positive advice and guidance on key issues arising from retirement. Employees can either contact the Learning and Development team directly or via the Onehr site for information relating to courses available.

4.8 Retirement Gifts

The Trust understands that without the dedication and loyalty of its Employees the success that has been achieved would not have been possible. It is therefore the wish of the Trust that Employees who retire with more than 20 years' aggregated service receive suitable recognition regardless of whether the Employee has worked full or part time.

4.8.1 1 - 20 years' service

Where Employees retire having up to 20 years, they will be presented with an acknowledgement letter from their line manager.

4.8.2 20 - 29 years' service

Where Employees retire having 20 years or more aggregated NHS service, they will receive a gift card to the value of £150 together with an acknowledgement letter from their line manager.

Managers will be responsible for the necessary arrangements of the retirement gift card.

In addition, their Manager will offer the opportunity for a retirement buffet to be organised for the Employee and colleagues from their work area as a further token of our appreciation. **The Managers must take full responsibility for the organisation and the authorisation of the buffet. Payment must be from the departmental budget.**

*The gift card will be purchased by the Trust and will be available to collect from the General Accounts office within 10 working days of a completed application form being received. **All application forms must be countersigned, or a corroborating email must be attached to the submitted application form (Appendix 3).***

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4.8.3 30 years' and over service

Where Employees retire having 30 years or more aggregated NHS service, they will receive a gift card to the value of £175 together with an acknowledgement letter from their line manager.

Managers will be responsible for the necessary arrangements of the retirement gift card.

In addition, their Manager will offer the opportunity for a retirement buffet to be organised for the Employee and colleagues from their work area as a further token of our appreciation. **The Managers must take full responsibility for the organisation and the authorisation of the buffet. Payment must be from the departmental budget.**

*The gift card will be purchased by the Trust and will be available to collect from the General Accounts office within 10 working days of a completed application form being received. **All application forms must be countersigned, or a corroborating email must be attached to the submitted application form.***

4.8.4 Gift or Gift card

The Trust will provide a gift card that can be used in many different outlets, including numerous mainstream shops, such as M & S, Curry's, Boots, Argos etc.

The available gift cards are Love2Shop and One4all gift cards a stock of which will be held in the account's office, thereby negating the need for managers to purchase the gift card themselves.

The available outlets are detailed on the following links: -

<https://www.highstreetvouchers.com/COMMON/pdfs/l2s-cards-flexecash-list.pdf>

<https://www.one4all.com/retailer.html>

It is anticipated that the retiring staff member will be able to purchase their gift via one of the outlets included in the gift card scheme.

In extenuating circumstances, for example the staff member requests a particular gift from a local trader who is not in the gift card scheme; arrangements can be made to facilitate such a request.

However, the following should be noted to maintain best financial practices. The accounts office will require an estimate, quote or invoice from the shop and payment will be made by bank transfer directly to the shop, or a cheque can be produced. In such scenarios, managers will be expected to have already discussed, with the retiring staff member, as to their wishes. The manager must liaise with the shop and the accounts office before any transaction is agreed or an item is purchased.

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4.8.5 Trust Property

Please note all Trust owned equipment and property should be returned to the line manager on or before the last day of working.

4.9 Appeal Process

Any employee has the right of appeal against a rejected application. A more senior level of manager than who made the decision will consider the appeal.

An appeal must be lodged in writing within **14 days** following the receipt of the written notice of refusal. The details of the persons to whom the appeal should be lodged with will be contained in the letter confirming the decision.

The purpose of the Appeal is to consider the decision made by the manager who refused the flexible working request. The format and timescales will follow the process outlined in section 4.3 however there will be no further right to appeal.

4.10 Suspicion of Fraudulent Activity

Any suspicion of fraudulent activity will be referred to the Trusts Counter Fraud Specialist for detailed information gathering. Should such an investigation find reasonable grounds to suspect an offense has been committed, further action will be taken, in accordance with the Trusts Counter Fraud and Corruption Policy.

5 References and Associated Documents

1. **BTHFT - Policy.** Attendance Management Policy. [Online] 11 01 2021. [Cited: 08 04 2022.] <http://fcsp.xfyldecoast.nhs.uk/trustdocuments/Documents/CORP-POL-011.docx>. CORP/POL/011.
2. —. Fraud, Bribery and Corruption Policy. [Online] 26 04 2021. [Cited: 08 04 2022.] <http://fcsp.xfyldecoast.nhs.uk/trustdocuments/Documents/CORP-POL-136.pdf>. CORP/POL/136.
3. —. Work-Life Balance. [Online] 15 05 2021. [Cited: 08 04 2022.] <http://fcsp.xfyldecoast.nhs.uk/trustdocuments/Documents/CORP-POL-521.docx>. CORP/POL/521.
4. **BTHFT - Procedure.** Grievance Procedure – Seeking a Resolution. [Online] 15 05 2021. [Cited: 08 04 2022.] <http://fcsp.xfyldecoast.nhs.uk/trustdocuments/Documents/CORP-PROC-200.docx>. CORP/PROC/200.
5. **NHS Business Services Authority.** NHS Pension. [Online] [Cited: 08 04 2022.] <https://www.nhsbsa.nhs.uk/nhs-pensions>.

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Appendix 1: [Letter A - Confirmation of Flexible Working Application](#)



**Blackpool Teaching
Hospitals**

NHS Foundation Trust

Human Resources Department
Blackpool Victoria Hospital
Whinney Heys Road
Blackpool
Lancashire
FY3 8NR

Telephone: <Telephone Number>

<Firstname>.<Surname>@nhs.net

Date:

Name
Address

Dear Name

Re: Request for Flexible Retirement application

I refer to the meeting on (DATE) when your request for flexible retirement was discussed and I am pleased to confirm that the Trust has agreed to your request.

This will mean that with effect from (DATE) – <<Amend as appropriate>>**outline agreed changes according to whether the flexibility is around ‘Wind down’, ‘Retire and come back’ or ‘Step down’.**

Should you have any queries, please do not hesitate to contact me,

Yours sincerely,

Line Manager

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Appendix 2: [Letter B - Reject Flexible Retirement Application](#)



**Blackpool Teaching
Hospitals**

NHS Foundation Trust

Human Resources Department
Blackpool Victoria Hospital
Whinney Heys Road
Blackpool
Lancashire
FY3 8NR

Telephone: <Telephone Number>

<Firstname>.<Surname>@nhs.net

Date:

Name
Address

Dear Name

Re: Request for Flexible Retirement application

I refer to the meeting on (DATE) when your request for flexible retirement was discussed and I regret to inform you that the Trust is not able to meet your request due to the following reason(s):

(MANAGER TO DELETE AS APPROPRIATE THOSE THAT DON'T APPLY)

- Economic reasons associated with a changing role.
- Planned structural changes including reorganisation of the work and the department.
- A genuine medical reason which can only be supported by evidence from Occupational Health.

Should you have any further queries in this regard, please do not hesitate to contact me to discuss.

Any employee has the right of appeal against a rejected application. A more senior level of manager than who made the decision will consider the appeal.

An appeal must be lodged in writing within **14 days** following the receipt of the written notice of refusal. The details of the persons to whom the appeal should be lodged with will be contained in the letter confirming the decision.

Yours sincerely,
Line Manager

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Appendix 3: [Manager Protocol for Arranging Retirement Recognition](#)

BLACKPOOL TEACHING HOSPITALS NHS FOUNDATION TRUST

STAFF RETIREMENT - APPLICATION FOR RETIREMENT GIFT

Staff who retire having completed a minimum of 20-29 years aggregated service in the NHS (whether whole time or part time) are eligible to receive **gift card** - to the value of £150.

Staff that retire having completed a minimum of 30 years and over aggregated service in the NHS (whether whole time or part time) are eligible to receive **a gift card** - to the value of £175.

Managers should note that a cash gift cannot be granted to staff as this would be classed as a taxable benefit and would have to be declared on tax returns

In order to obtain the gift card, Managers are required to submit the application form to the General Accounts office (once service is confirmed by Payroll) and to collect the gift card once delivered. *If a gift is required (see 4.8.4) the quote / invoice for the gift must be submitted to the Accounts office.*

Please complete the following sections in order to 'requisition' either/all of the above, and return to the Accounts department, Victoria Hospital at least 6 weeks prior to the retirement function.

Date of Retirement:	
Staff Members name:	
Post Held	
Date of Continuous NHS Service Date (CSD):	
Payroll Confirmation of CSD received:	Yes / No
Signature of payroll authoriser:	
Preferred gift / gift voucher retailer:	
Gift Vouchers required by:	
FOR OFFICE USE ONLY:	
Monies for gift/ gift vouchers processed on:	
Name of Accounts person issuing cash:	
Has receipt been received for gift/gift vouchers	Yes / No
Signature of Accounts	

Signature of Manager:.....

Declaration: - I declare that the information on this form is true, factually correct and complete. I understand that if I knowingly provide false information this may result in disciplinary action and I may be liable for prosecution and civil recovery proceedings

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Appendix 3: [Manager Protocol for Arranging Retirement Recognition](#)

BLACKPOOL TEACHING HOSPITALS NHS FOUNDATION TRUST

STAFF RETIREMENT - APPLICATION FOR RETIREMENT BUFFET

Staff who retire having completed a minimum of **20 years and over** aggregated service in the NHS (whether whole time or part time) are eligible to receive a buffet

The Managers must take full responsibility for the organisation and the authorisation of the buffet. Payment must be from the departmental budget.

Establish eligibility

Total of Aggregated Service: _____

Budget holder for Department Authorisation: _____

Amount: £ _____

Budget Code: _____

Date: _____

Once authorisation is received managers must make the necessary arrangements either with the Hospital Catering department, or local provider stating the authorised amount and full details of the request.

The maximum value the Department will contribute, towards a retirement buffet is £4.65 per head, for a maximum of 20 staff.

If 10 or more staff will be in attendance a cake can also be provided (to be paid by the department).

Payment must be received by the catering department prior to event and the catering services function booking form must be completed and submitted, including relevant budget codes, no later than 10 working days before the event.

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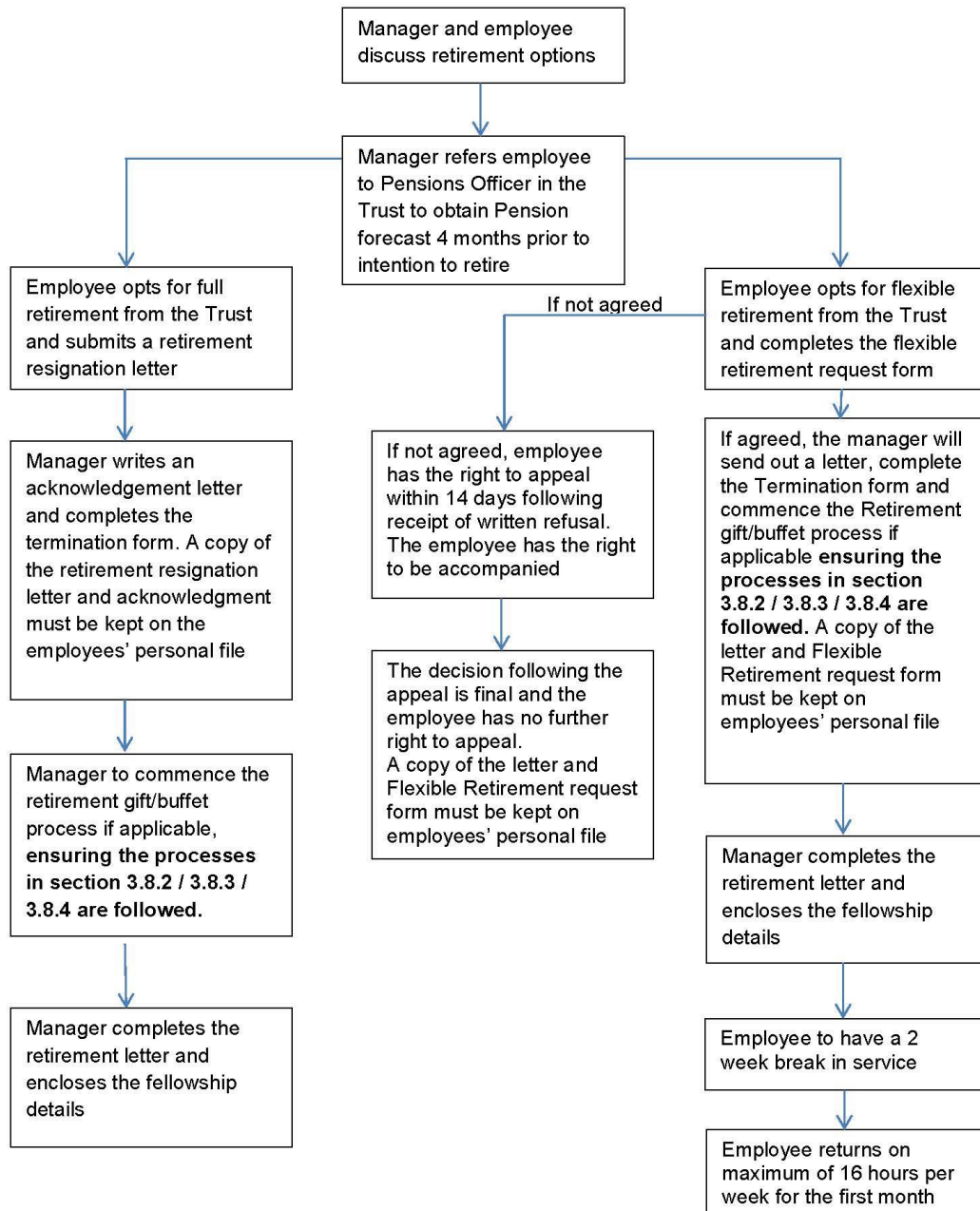
Appendix 4: Retirement Guidance Flowchart



Blackpool Teaching Hospitals

NHS Foundation Trust

Retirement Flowchart



Appendix 5: [Flexible Retirement Request Form](#)



**Blackpool Teaching
Hospitals**

NHS Foundation Trust

FLEXIBLE RETIREMENT REQUEST FORM

To apply for flexible retirement please complete this form and hand to your line manager.

Line managers are asked to review the Retirement Policy for guidance and give consideration to requests for flexible retirement and new working arrangements, whilst ensuring the arrangements are practical and meet both the business and operational needs of the service.

Employee Information:

Full Name:		Employee No:	
Job Title:		Assignment No:	
Department / Ward:			
Directorate:			
Band:			
Line Manager (Name / Job Title):			

Flexible Retirement Details:

Date of retirement:	
Date of return following (2 week) break in service:	
Proposed New Working Pattern during 1 st month following retirement:over.....days
Proposed New Working Pattern during 2 nd month onwards following retirement:over.....days
What is the time period of the request?	FromTo..... Permanent <input type="checkbox"/> Temporary <input type="checkbox"/>

Appendix 5: [Flexible Retirement Request Form](#)



**Blackpool Teaching
Hospitals**

NHS Foundation Trust

Explain how the change in your working pattern will affect your department / ward and colleagues:	
Suggest how the effect on your department / ward and colleagues can be most effectively be dealt with:	

Name of employee:

Declaration of Employee - *I declare that I understand and will abide by the terms of the Retirement policy. I understand that if I knowingly provide false information this may result in disciplinary action and I may be liable for prosecution and/or civil recovery proceedings. I consent to the disclosure of information from this form and any associated documentation, to the Local Counter Fraud Specialist and/or NHS Protect, for the purpose of verification and the investigation, prevention, detection and prosecution of fraud.*

Signature of employee:

Date:

Name of manager:

Signature of manager:

Designation:

Date:

On completion, a copy of this form must be kept on the personal file.

Blackpool Teaching Hospitals NHS Foundation Trust		ID No. CORP/POL/215
Revision No: 7	Next Review Date: 31/03/2025	Title: Retirement Policy
UNCONTROLLED COPY WHEN PRINTED		
Current Version held on the Intranet		

Appendix 6: Equality Impact Assessment Form					
Department	HR&OD	Service or Policy	CORP/POL/215	Date Completed:	September 2021
GROUPS TO BE CONSIDERED Deprived communities, homeless, substance misusers, people who have a disability, learning disability, older people, children and families, young people, Lesbian Gay Bi-sexual or Transgender, minority ethnic communities, Gypsy/Roma/Travellers, women/men, parents, carers, staff, wider community, offenders.					
EQUALITY PROTECTED CHARACTERISTICS TO BE CONSIDERED Age, gender, disability, race, sexual orientation, gender identity (or reassignment), religion and belief, carers, Human Rights and social economic / deprivation.					
QUESTION	RESPONSE		IMPACT		
	Issue	Action	Positive	Negative	
What is the service, leaflet or policy development? What are its aims, who are the target audience?	This document outlines the Trust policy on various aspects of retirement from the service for all employees of BTH The policy/Procedural Document is to ensure that all managers and members of staff have clear guidance on processes to be followed. The target audience is all staff across the Organisation who wish to retire, OR TAKE FLEXIBLE RETIREMENT respective of age	N/A			
Does the service, leaflet or policy/ development impact on community safety • Crime • Community cohesion	No	N/A			
Is there any evidence that groups who should benefit do not? i.e. equal opportunity monitoring of service users and/or staff. If none/insufficient local or national data available consider what information you need.	No ne	N/A	We are an inclusive Trust, any decisions for Retire and Return are made on a business need		
Does the service, leaflet or development/ policy have a negative impact on any geographical or sub group of the population?	The policy is aimed at all those entitled to retire –the age is not defined	Flexible retirement enhances working arrangements for staff and benefits users by retaining experienced workforce			
How does the service, leaflet or policy/ development promote equality and diversity?	It promotes the opportunity for people to choose their retirement date – it NO longer obligates employees to retire at a defined age.				
Does the service, leaflet or policy/ development explicitly include a commitment to equality and diversity and meeting needs? How does it demonstrate its impact?	Yes the policy recognises that there is no longer a defined retirement age. All employees are entitled to the same rights if they are entitled to retirement				
Does the Organisation or service workforce reflect the local population? Do we employ people from disadvantaged groups	Not applicable				
Will the service, leaflet or policy/ development i. Improve economic social conditions in deprived areas ii. Use brown field sites iii. Improve public spaces including creation of green spaces?	Not applicable				
Does the service, leaflet or policy/ development promote equity of lifelong learning?	Not applicable				
Does the service, leaflet or policy/ development encourage healthy lifestyles and reduce risks to health?	In introducing flexible retirement the policy positively impacts on life choices and work force retention	N/A	Work life balance requests made for those wishing to return after retirement. Pre-retirement courses to assist financial planning		

Appendix 6: Equality Impact Assessment Form				
Does the service, leaflet or policy/development impact on transport? What are the implications of this?	Not applicable			
Does the service, leaflet or policy/development impact on housing, housing needs, homelessness, or a person's ability to remain at home?	Not applicable			
Are there any groups for whom this policy/ service/leaflet would have an impact? Is it an adverse/negative impact? Does it or could it (or is the perception that it could exclude disadvantaged or marginalised groups?	Impacts on those wishing to retire. The impact is positive		Inclusive scheme	
Does the policy/development promote access to services and facilities for any group in particular?	It ensures equality for all			
Does the service, leaflet or policy/development impact on the environment • During development • At implementation?	Not applicable			
ACTION:				
Please identify if you are now required to carry out a Full Equality Analysis		Yes	No	(Please delete as appropriate)
Name of Author:	Deborah Booth	Date Signed:		
Signature of Author:	Elaine Hindle			
Name of Lead Person:		Date Signed:		
Signature of Lead Person:				
Name of Manager:		Date Signed:		
Signature of Manager				