

# HUMAN RESOURCES

## EQUALITY IMPACT ASSESSMENT AND ANALYSIS (EqIAA)

### INTRODUCTORY INFORMATION

<b>Name of Function under consideration:</b>	Flexible Retirement Policy and Procedure
<b>Date(s) of completing the EqIAA:</b>	25/09/12
<b>Name and job title(s) of person(s) completing the EqIAA:</b>	Zoe Pritchard, HR Advisor

### SECTION 1 – IMPACT AND ANALYSIS

**1. Considering all aspects of this Function, state what issues have an impact on equalities and why.**

This policy has a positive impact on supporting older workers by allowing them to apply for flexible retirement, aiming to assist a more gradual move into retirement over a period of years, by allowing an employee to work fewer hours and/or in a less demanding job, whilst at the same time drawing their pension. This may be of benefit to the employee, and also the council in terms of retaining the services of the employee.

Flexible working is open to those in the statutory definition, i.e. for childcare or care of an adult. It is arguable that flexible working applications should be opened up to all employees to avoid the possibility of age, or any other related discrimination.

Considering all aspects of this Function, the accessibility of the document is critical to ensuring that there is no equalities impact. The principles of the RNIB's Clear Print guidelines will be adopted to produce the policy, procedure and guide in an accessible format, i.e. font type and size, contrasting colours, a clear layout, numbered sections. The document is available on the MyHR intranet site and a printable version is also available.

The policy is available in different formats by contacting the HR Employee Relations Team.

There are no other issues that impact on equalities.

**2. What data does the council have internally that links to this Function and what does it tell us about equalities impact?** (sources of data include:- the annual Equalities in Employment Report, Staff Survey data, recruitment data, leavers questionnaire analysis etc.)

Payroll and Resourcelink (the personnel database) can identify 51 employees have taken flexible retirement over the last 5.5 years. 10.8% of the workforce was aged 60+ in the year 2011/12. 28.8% were between 50 and 59 (Employment Monitoring Report 2011/12). The policy says employees aged over 55 can apply for flexible retirement, but mainly over 60s are likely to be successful due to policy terms.

A positive impact on older workers has been identified.

**3. Where appropriate, what consultation has been conducted in relation to this Function and what evidence has this provided about equalities impact?**

Consultation has taken place with payroll and the HR Service Centre.  
The consultation did not identify any adverse impact in respect of equalities.  
Will be mentioned at HR/TU in December.

**4. What relevant external research (data, reports, expert opinion, legislation etc.) has been considered and what evidence has this provided about equalities impact?**

Legislation has been considered in producing this policy including the Equality Act 2010. This research demonstrates that the council is meeting its legal requirements and follows best practice. It evidences a positive impact on older people but with a possible negative impact on other age groups. The Flexible Working policy is due for review in December 2012.

**5. Any other relevant notes?**

None

## SECTION 2 – OUTCOMES

6. The evidence that has been collected under Section 1 of this form will need to feed into the decision making process regarding any changes to be implemented before any final decisions are taken. There are four possible outcomes of this EqlAA – indicate which outcome below with the reasons and justification for this.

Outcome	Your response	Reason(s) and Justification
<p><b>Outcome 1:</b> No major change required.</p>	<input checked="" type="checkbox"/>	<p>This EqlAA has not identified a positive impact on older workers. There is a possible negative impact on other age groups, who unless they fit statutory definitions to request flexible working i.e. childcare, they cannot apply. It therefore highlights the need to review the Flexible Working policy which will be undertaken in December 2012 to consider if applications for flexible working should be opened up to all workers.</p> <p>Have added in the right of appeal for a refusal to take flexible retirement which could assist with any possible equalities impacts.</p>
<p><b>Outcome 2:</b> Adjustments to remove barriers or to better promote equality have been identified.</p>	<input type="checkbox"/>	
<p><b>Outcome 3:</b> Continue despite having identified potential for adverse impact or missed opportunities to promote equality.</p>	<input type="checkbox"/>	
<p><b>Outcome 4:</b> Stop and rethink.</p>	<input type="checkbox"/>	

**7. List the actions you will take as a result of this EqIAA.**

Added in right of appeal to flexible retirement policy, amended right of appeal policy accordingly.

Ensured policy and procedure in line with RNIB guidelines and South Gloucestershire council plain English guidance.

Emphasised that flexible retirement requires council approval based on objective criteria which should reduce differential treatment and therefore any equalities impacts.

**SECTION 3 – EqIAA EVIDENCE**

**8. List and attach the evidence you have which shows how you have systematically considered equality impact.**

Flexible retirement and retirement: Age positive guide, Department for Work and Pensions 2007.

Employment Monitoring Report 2011/12, South Gloucestershire Council

<http://www.homeoffice.gov.uk/equalities/> - Information on Equalities Act 2010.