

PBNI Section 75 Policy Screening Template

Part 1. Policy Scoping Information about the policy

This form should be read in conjunction with the Equality Commission's revised Section 75, "A Guide for Public Authorities" April 2010 and available via the following link [S75 Guide for Public Authorities April 2010](#). Staff should complete a form for each new or revised policy for which they are responsible (see page 6 for a definition of policy in respect of section 75).

The purpose of screening is to identify those policies that are likely to have an impact on equality of opportunity and/or good relations and so determine whether an Equality Impact Assessment (EQIA) is necessary. Screening should be introduced at an early stage when developing or reviewing a policy.

1.1 Name of the policy

Retirement Policy

1.2 Is this an existing, revised or a new policy? (Use drop down menu)

New

1.3 What is it trying to achieve? (Intended aims/outcomes)

The aim of this policy is to ensure that those employees who wish to retire are dealt with in a fair, equitable and transparent manner in accordance with legislation.

1.4 Are there any Section 75 categories which might be expected to benefit from the intended policy? If so, explain how.

Age. The removal of the Default Retirement Age with effect from 1 October 2011 means that a mandatory retirement age no longer exists and employees will not have to retire at a certain age.

1.5 Who initiated or wrote the policy?

Deputy Principal - Human Resources

1.6 Who owns and who implements the policy?

Human Resources Department

Implementation factors

1.7 Are there any factors which could contribute to/detract from the intended aim/outcome of the policy/decision?

If yes, are they

financial

legislative

other, please specify

Main stakeholders affected

1.8 Who are the internal and external stakeholders (actual or potential) that the policy will impact upon?

staff

service users

other public sector organisations

voluntary/community/trade unions

other, please specify

1.9 Other policies with a bearing on this policy

- what are they?

Statement of Policy on Discretionary Provisions

- who owns them?

Human Resources Department

Available evidence

1.10 What evidence/information (both qualitative and quantitative) have you gathered to inform this policy? Specify details for each of the Section 75 categories.

Section 75 category	Details of evidence/information
Religious belief	<p>Details from the last Section 75 report (May 2011) indicated that the PBNI workforce is as follows:</p> <p>Non-determined 6% Protestant 45% Catholic 49%</p> <p>The operation of this policy has no impact on religious belief</p>
Political opinion	<p>The operation of this policy has no impact on political opinion</p>
Racial group	<p>Details from the last Section 75 report (May 2011) indicated that the PBNI workforce is as follows:</p> <p>White 98%. Mixed 1% Not Disclosed 1%</p> <p>The operation of this policy has no impact on any particular racial group</p>
Age	<p>Details from the last Section 75 report (May 2011) indicated that the PBNI workforce is as follows:</p> <p>18-25 = 1.5% 26-35 = 23% 36-45 = 29% 46-55 = 31% 56+ 15% Blank = 0.5%</p> <p>The Retirement Policy and Procedure is linked to pension regulations which are set outside of PBNI's control. Staff can elect to retire or flexibly retire from age 60. Staff wishing to retire from age 55 must seek their employer's consent given that actuarial costs will be involved. However with the removal of the default retirement age staff are no longer required to retire at age 65.</p>
Marital status	<p>Details from the last Section 75 report (May 2011) indicated that the PBNI workforce is as follows:</p> <p>Single = 23% Married = 62% Widowed = 1% Separated = 3% Divorced = 3% Civil Partnership = 1% Cohabit = 5% Not Disclosed = 1% Blank = 1%</p>

	The operation of this policy has no impact on marital status
Sexual orientation	<p>Details from the last Section 75 report (May 2011) indicated that the PBNI workforce is as follows:</p> <p>Heterosexual = 82% Bisexual = 1% Gay/Lesbian = 1%</p> <p>Not Disclosed = 2 % Blank 14%</p> <p>The operation of this policy has no impact on sexual orientation</p>
Men and women generally	<p>Details from the last Section 75 report (May 2011) indicated that the PBNI workforce is as follows:</p> <p>Male = 31% Female = 69%</p> <p>The operation of this policy has no impact on gender</p>
Disability	<p>Details from the last Section 75 report (May 2011) indicated that the PBNI workforce is as follows:</p> <p>Disabled = 4% Not Disabled = 96%</p> <p>The operation of this policy has no impact on those with a disability. On some occasions staff may require sick absence due to a condition which may be deemed a disability which in turn may lead to ill-health retirement. However staff without a disability may also be retired on ill-health grounds.</p>
Dependants	<p>Details from the last Section 75 report (May 2011) indicated that the PBNI workforce is as follows:</p> <p>Staff with Children = 23% Person with Disability = 2% Elderly Person = 3% No Dependants = 56% Not Disclosed = 1%</p> <p>Requests for early/flexible retirement are considered under the policy to enable a member of staff to provide personal care for an elderly or infirm spouse, child, parent, sibling or other dependant.</p>

Needs, experiences and priorities

1.11 Taking into account the information referred to above, what are the different needs, experiences and priorities of each of the following categories, in relation to the particular policy/decision? Specify details for each of the Section 75 categories

Section 75 category	Details of needs/experiences/priorities
Religious belief	None in relation to this policy
Political opinion	None in relation to this policy
Racial group	None in relation to this policy
Age	While the abolition of the default retirement age means it is no longer mandatory to retire at a certain age, it is recognised that staff will wish to retire at some point and the policy has therefore been drawn up to enable a fair and consistent process to be followed in such circumstances, taking account of pension regulations.
Marital status	None in relation to this policy
Sexual orientation	None in relation to this policy
Men and women generally	None in relation to this policy
Disability	As stated in 1.10
Dependants	As stated in 1.10

Part 2. Equality Screening Questions

SCREENING QUESTIONS

- 2.1** In making a decision as to whether or not there is a need to carry out an equality impact assessment, consider questions 2.5 -2.8 listed below.
- 2.2** If the conclusion is **none** in respect of all of the Section 75 equality of opportunity and/or good relations categories, then the decision may to screen the policy out. If a policy is 'screened out' as having no relevance to equality of opportunity or good relations, give details of the reasons for the decision taken.
- 2.3** If the conclusion is **minor** in respect of one or more of the Section 75 equality categories and/or good relations categories, then consideration should still be given to proceeding with an equality impact assessment, or to:
- i.measures to mitigate the adverse impact; or
 - ii.the introduction of an alternative policy to better promote equality of opportunity and/or good relations.
- 2.4** If the conclusion is **major** in respect of one or more of the Section 75 equality of opportunity and/or good relations categories, then consideration should be given to subjecting the policy to the equality impact assessment procedure.

2.5 Equality Impact

What is the likely impact on equality of opportunity for those affected by this policy, for each of the Section 75 equality categories? Minor Major None		
Section 75 category	Details of policy impact	Level of impact? Minor Major None
Religious belief	None	
Political opinion	None	
Racial group	None	
Age	None	
Marital status	None	
Sexual orientation	None	
Men and women generally	None	
Disability	None	
Dependants	None	

2.6 Promotion of Equality

Are there opportunities to better promote equality of opportunity for people within the Section 75 equalities categories?		
Section 75 category	If Yes , provide details	If No , provide reasons
Religious belief	Opportunity to work beyond age 65 or seek retirement from age 55 has no bearing on religious belief	
Political opinion	Opportunity to work beyond age 65 or seek retirement from age 55 has no bearing on political opinion	
Racial group	Opportunity to work beyond age 65 or seek retirement from age 55 has no bearing on racial group	
Age	The opportunity to work beyond age 65 and remain in employment	
Marital status	Opportunity to work beyond age 65 or seek retirement from age 55 has no bearing on marital status	
Sexual orientation	Opportunity to work beyond age 65 or seek retirement from age 55 has no bearing on sexual orientation	
Men and women generally	Opportunity to work beyond age 65 or seek retirement from age 55 has no bearing on gender	
Disability	Opportunity to work beyond age 65 or seek retirement from age 55 has no bearing on disability. Policy ensures a consistent and fair approach for those who may be retired due to ill-health connected with a disability.	

Dependants	Opportunity to work beyond age 65 has no bearing on those staff with dependants. Policy ensures a consistent a fair approach for those seeking to retire to provide personal care to dependants	
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2.7 Good Relation Impact

To what extent is the policy likely to impact on good relations between people of different religious belief, political opinion or racial group? Minor Major None		
Good relations category	Details of policy impact	Level of impact Minor Major None
Religious belief	None	
Political opinion	None	
Racial group	None	

2.8 Promotion of Good Relations

4 Are there opportunities to better promote good relations between people of different religious belief, political opinion or racial group?		
Good relations category	If Yes , provide details	If No , provide reasons
Religious belief	None	
Political opinion	None	
Racial group	None	

Additional considerations

Multiple identities

2.9 Generally speaking, people can fall into more than one Section 75 category. Taking this into consideration, are there any potential impacts of the policy/decision on people with multiple identities? *(For example; disabled women; young Protestant men; and young lesbians, gay and bisexual people).*

2.10 Provide details of data on the impact of the policy on people with multiple identities. Specify relevant Section 75 categories concerned.

2.11 Is there an opportunity thorough this policy for PBNI to promote positive attitudes towards disabled people or encourage the participation of disabled people in public life?

Yes

No

If answered yes detail how this will be achieved: -

Part 3 Screening decision

3.1 If the decision is not to conduct an equality impact assessment, please provide details of the reasons.

No equality issues have been identified that warrant a further inspection of equality issues in relation to this policy.

3.2 If the decision is not to conduct an equality impact assessment consider if the policy should be mitigated or an alternative policy be introduced.

N/A

3.3 If the decision is to subject the policy to an equality impact assessment, please provide details of the reasons.

N/A

Mitigation

3.4 When the likely impact is 'minor' an equality impact assessment is not to be conducted, mitigation may lessen the severity of any equality impact, or

the introduction of an alternative policy to better promote equality of opportunity or good relations.

3.5 Can the policy/decision be amended or changed or an alternative policy introduced to better promote equality of opportunity and/or good relations and if so, give the **reasons** to support your decision, together with the proposed changes/amendments or alternative policy.

N/A

Timetabling and prioritising

3.6 If the policy has been ‘**screened in**’ for equality impact assessment, then please answer the following questions to determine its priority for timetabling the equality impact assessment.

3.7 On a scale of 1-3, with 1 being the lowest priority and 3 being the highest, assess the policy in terms of its priority for equality impact assessment.

Priority criterion	Rating (1-3)
Effect on equality of opportunity and good relations	
Social need	
Effect on people’s daily lives	
Relevance to a public authority’s functions	

Note: The Total Rating Score should be used to prioritise the policy in rank order with other policies screened in for equality impact assessment. This list of priorities will assist the public authority in timetabling. Details of the Public Authority’s Equality Impact Assessment Timetable should be included in the quarterly Screening Report.

3.8 Is the policy affected by timetables established by other relevant public authorities and if yes, please provide details

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Monitoring

The Equality Commission recommends that where the policy has been amended or an alternative policy introduced, the public authority should monitor more broadly than for adverse impact (See Benefits, P.9-10, Para 2.13 – 2.20 of the ECNI Monitoring Guidance 2007).

Effective monitoring will help the public authority identify any future adverse impact arising from the policy which may lead the public authority to conduct an equality impact assessment, as well as help with future planning and policy development.

Approval and authorisation

	Position/Job Title	Date
Screened by:	Joanne Wilson, DP	31.05.2012
Approved by:	Head of HR	12.06.2012

Note: A copy of the Screening Template, for each policy screened should be 'signed off' and approved by a senior manager responsible for the policy and made easily accessible on PBNI website as soon as possible following completion and made available on request. Completed forms must be forwarded to equality@pbni.gsi.gov.uk