

PBNI Equality Impact Screening

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 and Procedure
Statement of Employer Policy on Discretionary Provisions under NILGOSC Regulations

1.2 Is this an existing, revised or a new policy?

Revised

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

The aim of the policy is to ensure that those employees who wish to retire or flexibly retire are dealt with in a fair, equitable and transparent manner in accordance with legislation and to ensure PBNI has a clear structure framework for dealing with retirements and flexible retirements.

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

Age.
Changes to pension legislation with effect from 1 April 2015 mean that the 'normal pension age' has been redefined, and is the employee's state pension age subject to a minimum age of 65. Under the Local Government Pension Scheme for Northern Ireland (LGPS NI) employees can however elect to retire from age 55 or can decide to continue working and contribute to the pension scheme up until 2 days before their 75th birthday. Employer consent is no longer required if an employee wishes to retire before age 60 providing greater choice on when an employee can retire (subject to their own personal financial considerations). Employees can also seek consent for flexible retirement (partial retirement) from age 55 onwards, meaning they can avail of pension benefits and continue in work on a reduced working hours' basis.

1.5 Who initiated or wrote the policy?

Staff Officer Human Resources Department

1.6 Which Dept. 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 Employer Policy on Discretionary Provisions is linked to the Retirement Policy and is being considered in conjunction with the Retirement Policy under this Equality Impact Screening

- 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 latest Section 75 report indicated that PBNI workforce is as follows:</p> <p>Non-determined 7% Protestant 45% Catholic 47% Blank 1%</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 latest Section 75 report indicate that the PBNI workforce is as follows:</p> <p>White 97.42% Mixed 0.7% Other 0.23% Not disclosed 0.7%</p> <p>The operation of this policy has no impact on</p>
Age	<p>Details from the latest Section 75 report indicate that the PBNI workforce is as follows:</p> <p>18-25 = 2% 26-35 = 21% 36-45 = 30% 46-55 = 30% 56+ = 16%</p> <p>Blank = 1%</p> <p>The Retirement Policy and Procedure are linked to pension regulations which are set outside of PBNI's control. Staff can elect to retire or from age 55 or can seek employer's consent for flexible retirement. Alternatively, can seek to remain in work and take their pension up to 2 days before their 75th birthday.</p>
Marital status	<p>Details from the latest Section 75 report indicate that the PBNI workforce is as follows:</p> <p>Single = 24% Married = 60% Widowed = 1% Separated = 3% Divorced = 3% Civil Partnership 0% Cohabit 6% Not disclosed 2% Blank 1%</p>

	<p>The operation of this policy has no impact on marital status.</p>
<p>Sexual orientation</p>	<p>Details from the latest Section 75 report indicate 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>
<p>Men and women generally</p>	<p>Details from the latest Section 75 report indicate that the PBNI workforce is as follows:</p> <p>Male = 30% Female = 70%</p> <p>The operation of this policy has no impact on gender. Both male and female staff are afforded the same rights under pension regulations, PBNI Retirement Policy and Procedure (and the Statement of Employer Policy on Discretionary Provisions under NILGOSC regulations).</p>
<p>Disability</p>	<p>Details from the latest Section 75 report indicate 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 medical condition which may be deemed a disability which in turn could lead to ill-health retirement. However staff without a disability may also be retired on ill-health grounds. Any retirement on ill-health grounds falls outside the Retirement Policy as it is processed under the Managing Attendance Policy and Procedure.</p>
<p>Dependants</p>	<p>Details from the latest Section 75 report indicate that the PBNI workforce is as follows:</p> <p>Staff with children = 38% Person with disability = 2% Elderly person = 3% No dependents = 56% Not disclosed 1%</p> <p>Requests for early/flexible retirement can be 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	Staff will have different 'normal pension ages' ranging from age 65 upwards. However the NILGOSC scheme provisions allow for members to retire from age 55 or alternatively to continue working and hold off drawing down their pension until 2 days before their 75 th birthday. Staff can also seek consent for flexible retirement from age 55. The Retirement Policy and Procedure has been drawn up to enable a fair, consistent process to be followed irrespective of when the individual decides to retire and provides a structure framework, 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 to age 75 or seek retirement from age 55 has no bearing on religious belief	
Political opinion	Opportunity to work to age 75 or seek retirement from age 55 has no bearing on political opinion	
Racial group	Opportunity to work to age 75 or seek retirement from age 55 has no bearing on racial group	
Age	All staff have the opportunity to elect to retire at age 55 depending on their own financial considerations or alternatively continue to work and contribute to the pension scheme until two days before their 75 th birthday.	
Marital status	Opportunity to work to age 75 or seek retirement from age 55 has no bearing on marital status	
Sexual orientation	Opportunity to work to age 75 or seek retirement from age 55 has no bearing on sexual orientation	
Men and women generally	Opportunity to work to age 75 or seek retirement from age 55 has no bearing on gender	
Disability	Opportunity to work to age 75 or seek retirement from age 55 has no bearing on disability. If retirement is due to ill-health/disability then PBNI's Managing Attendance Policy and Procedure is	

	followed.	
Dependants	Opportunity to work to age 75 or seek retirement from age 55 has no bearing on those staff with dependents. Policy ensures a consistent and fair approach for those seeking to retire to provide personal care for dependents.	

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).

None

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

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2.11 Is there an opportunity through 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. 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

Date Screening Completed: 13 December 2019

Department Completing this Screening: Human Resources Department