

Equality & Health Impact Assessment for

Retirement Procedure

1.	For service change, provide the title of the Project Outline Document or Business Case and Reference Number	
2.	Name of Clinical Board / Corporate Directorate and title of lead member of staff, including contact details	Caroline Hill Assistant People Business Partner People & OD Directorate
3.	Objectives of strategy/ policy/ plan/ procedure/ service	The procedure sets out the process to be followed when employees approach retirement; and is designed to ensure that they are aware of the different types of retirement options and the process involved in applying for their pension.
4.	Evidence and background information considered. For example <ul style="list-style-type: none"> • population data • staff and service users data, as applicable • needs assessment • engagement and involvement findings • research • good practice guidelines • participant knowledge • list of stakeholders and how stakeholders have engaged in the development stages 	<u>Policy Workshop</u> Policy development workshop was held, including managers, staff and TU representatives. Comments from workshop and expert information from Pensions Department, NHS Shared Services Partnership have been incorporated into the procedure. Stakeholders involved with the development of this procedure include: <ul style="list-style-type: none"> • People & OD Policy Review Workshop attendees • HR Advisers and HR Business Partners in the People & OD Team • Colleagues from Public Health Wales

- comments from those involved in the designing and development stages

Population pyramids are available from Public Health Wales Observatory and the 'Shaping Our Future Wellbeing' Strategy provides an overview of health need.

- Trade union representatives from Public Health Wales
- New and existing employees of Public Health Wales
- Pensions Department, NHS Shared Services Partnership

Staff & users data as of February 2020

Age Profile

Age Band	Headcount	%
<=20 Years	3	0.15
21-25	87	4.25
26-30	203	9.92
31-35	260	12.70
36-40	322	15.73
41-45	273	13.34
46-50	275	13.43
51-55	322	15.73
56-60	204	9.97
61-65	83	4.05
66-70	12	0.59
>=71 Years	3	0.15
Grand Total	2047	100.00

Gender

Gender	Headcount	%
Female	477	23.30
Male	1570	76.70
Grand Total	2,047	100

Disability

Disability Flag	Headcount	%
No	1360	66.44
Not Declared	142	6.94
Unspecified	449	21.93
Yes	96	4.69
Grand Total	2,047	100

Ethnic Origin

Ethnic origin	Headcount	%
Any Other Ethnic Group	6	0.29
Asian British	1	0.05
Asian or Asian British - Any other Asian background	7	0.34
Asian or Asian British - Bangladeshi	4	0.20
Asian or Asian British - Indian	15	0.73
Asian or Asian British - Pakistani	11	0.54
Asian Sinhalese	1	0.05
Black British	1	0.05
Black Mixed	1	0.05
Black or Black British - African	16	0.78
Black or Black British - Caribbean	4	0.20

		Chinese	5	0.24
		Filipino	1	0.05
		Japanese	1	0.05
		Mixed - any other mixed background	7	0.34
		Mixed - White & Asian	10	0.49
		Mixed - White & Black African	7	0.34
		Not stated/unspecified	360	17.59
		White	1589	77.63
		Grand Total	2047	100.00
5.	Who will be affected by the strategy/ policy/ plan/ procedure/ service	<p>This procedure will benefit all staff and stakeholders by setting out the commitment of the Trust to high standards of health, safety and welfare.</p> <p>Public Health Wales recognises that a change from employment to retirement is one of the most significant events encountered during a person's life. It is, therefore, appropriate that employees are supported and advised to enable them to experience a smooth transition from work to retirement.</p> <p>The rules covering retirement and accessing a specific NHS Pension Scheme are fairly complex and this procedure sets out the process to be followed when employees approach retirement; and is designed to ensure that they are aware of the different types of retirement and the process involved in applying for their pension.</p>		

6. EQIA / How will the strategy, policy, plan, procedure and/or service impact on people?

Questions in this section relate to the impact on people on the basis of their 'protected characteristics'. Specific alignment with the 7 goals of the Well-being of Future Generations (Wales) Act 2015 is included against the relevant sections.

How will the strategy, policy, plan, procedure and/or service impact on:-	Potential positive and/or negative impacts	Recommendations for improvement/mitigation	Action taken by Directorate. Make reference to where the mitigation is included in the document, as appropriate
<p>6.1 Age For most purposes, the main categories are:</p> <ul style="list-style-type: none"> • under 18; • between 18 and 65; and • over 65 	No differential impact		The procedure will be monitored and updated in line with good practice and other changes as required.
<p>6.2 Persons with a disability as defined in the Equality Act 2010 Those with physical impairments, learning disability, sensory loss or impairment, mental health conditions, long-term medical conditions such as diabetes</p>	No differential impact		The procedure will be monitored and updated in line with good practice and other changes as required.
<p>6.3 People of different genders:</p>	No differential impact		The procedure will be monitored and updated in

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<p>Consider men, women, people undergoing gender reassignment</p> <p>NB Gender-reassignment is anyone who proposes to, starts, is going through or who has completed a process to change his or her gender with or without going through any medical procedures. Sometimes referred to as Trans or Transgender</p>			<p>line with good practice and other changes as required..</p>
<p>6.4 People who are married or who have a civil partner.</p>	<p>No differential impact</p>		<p>The procedure will be monitored and updated in line with good practice and other changes as required.</p>

How will the strategy, policy, plan, procedure and/or service impact on:-	Potential positive and/or negative impacts	Recommendations for improvement/mitigation	Action taken by Directorate. Make reference to where the mitigation is included in the document, as appropriate
6.5 Women who are expecting a baby, who are on a break from work after having a baby, or who are breastfeeding.	No differential impact		The procedure will be monitored and updated in line with good practice and other changes as required.
6.6 People of a different race, nationality, colour, culture or ethnic origin including non-English speakers, gypsies/travellers, migrant workers	No differential impact		The procedure will be monitored and updated in line with good practice and other changes as required.
6.7 People with a religion or belief or with no religion or belief. The term 'religion' includes a religious or philosophical belief	No differential impact		The procedure will be monitored and updated in line with good practice and other changes as required.
6.8 People who are attracted to other people of: <ul style="list-style-type: none"> • the opposite sex (heterosexual); • the same sex (lesbian or gay); 	No differential impact		The procedure will be monitored and updated in line with good practice and other changes as required.

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<ul style="list-style-type: none"> • both sexes (bisexual) 			
<p>6.9 People who communicate using the Welsh language in terms of correspondence, information leaflets, or service plans and design</p> <p>Well-being Goal – A Wales of vibrant culture and thriving Welsh language</p>	<p>All documentation generated will be will be issued in both Welsh and English.</p> <p>PHW is currently working towards translating its retirement documentation.</p> <p>The organisation will furthermore comply with the Welsh Language Standards.</p> <p>PHW considers communication and language to be core components of Public Health service and is committed to providing quality healthcare services through the medium of Welsh.</p> <p>PHW will ensure it has staff with the appropriate bilingual skills and specialist</p>		<p>The procedure will be monitored and updated in line with good practice and other changes as required.</p>

How will the strategy, policy, plan, procedure and/or service impact on:-	Potential positive and/or negative impacts	Recommendations for improvement/mitigation	Action taken by Directorate. Make reference to where the mitigation is included in the document, as appropriate
	knowledge in each service through use of the Welsh Language skills assessment tool.		
6.10 People according to their income related group: Consider people on low income, economically inactive, unemployed/workless, people who are unable to work due to ill-health	No differential impact		The procedure will be monitored and updated in line with good practice and other changes as required.
6.11 People according to where they live: Consider people living in areas known to exhibit poor economic and/or health indicators, people unable to access services and facilities	No differential impact		The procedure will be monitored and updated in line with good practice and other changes as required.

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6.12 Consider any other groups and risk factors relevant to this strategy, policy, plan, procedure and/or service	None identified		

HIA / How will the strategy, policy, plan, procedure and/or service impact on the health and well-being of our population and help address inequalities in health?

Questions in this section relate to the impact on the overall health of individual people and on the impact on our population. Specific alignment with the 7 goals of the Well-being of Future Generations (Wales) Act 2015 is included against the relevant sections.

How will the strategy, policy, plan, procedure and/or service impact on:-	Potential positive and/or negative impacts and any particular groups affected	Recommendations for improvement/mitigation	Action taken by Clinical Board / Corporate Directorate Make reference to where the mitigation is included in the document, as appropriate
<p>7.1 People being able to access the service offered: Consider access for those living in areas of deprivation and/or those experiencing health inequalities</p> <p>Well-being Goal - A more equal Wales</p>	<p>This is a procedure for Public Health Wales staff use therefore can be accessed by all. Advice and support is available via People & OD.</p>		
<p>7.2 People being able to improve /maintain healthy lifestyles: Consider the impact on healthy lifestyles, including healthy eating, being active, no smoking /smoking cessation,</p>	<p>This is a procedure for Public Health Wales staff and can be accessed by all.</p>		

How will the strategy, policy, plan, procedure and/or service impact on:-	Potential positive and/or negative impacts and any particular groups affected	Recommendations for improvement/ mitigation	Action taken by Clinical Board / Corporate Directorate Make reference to where the mitigation is included in the document, as appropriate
<p>reducing the harm caused by alcohol and /or non-prescribed drugs plus access to services that support disease prevention (eg immunisation and vaccination, falls prevention). Also consider impact on access to supportive services including smoking cessation services, weight management services etc</p> <p>Well-being Goal – A healthier Wales</p>			
<p>7.3 People in terms of their income and employment status: Consider the impact on the availability and accessibility of work, paid/ unpaid employment, wage levels, job security, working conditions</p>	<p>This is a procedure for Public Health Wales staff and can be accessed by all.</p>		

How will the strategy, policy, plan, procedure and/or service impact on:-	Potential positive and/or negative impacts and any particular groups affected	Recommendations for improvement/mitigation	Action taken by Clinical Board / Corporate Directorate Make reference to where the mitigation is included in the document, as appropriate
Well-being Goal – A prosperous Wales			
<p>7.4 People in terms of their use of the physical environment: Consider the impact on the availability and accessibility of transport, healthy food, leisure activities, green spaces; of the design of the built environment on the physical and mental health of patients, staff and visitors; on air quality, exposure to pollutants; safety of neighbourhoods, exposure to crime; road safety and preventing injuries/accidents; quality and safety of play areas and open spaces</p> <p>Well-being Goal – A resilient Wales</p>	<p>This is a procedure for Public Health Wales staff and can be accessed by all.</p>		

How will the strategy, policy, plan, procedure and/or service impact on:-	Potential positive and/or negative impacts and any particular groups affected	Recommendations for improvement/mitigation	Action taken by Clinical Board / Corporate Directorate Make reference to where the mitigation is included in the document, as appropriate
<p>7.5 People in terms of social and community influences on their health: Consider the impact on family organisation and roles; social support and social networks; neighbourliness and sense of belonging; social isolation; peer pressure; community identity; cultural and spiritual ethos</p> <p>Well-being Goal – A Wales of cohesive communities</p>	No direct impact		
<p>7.6 People in terms of macro-economic, environmental and sustainability factors: Consider the impact of government policies; gross domestic product; economic development; biological diversity; climate</p>	No direct impact		

How will the strategy, policy, plan, procedure and/or service impact on:-	Potential positive and/or negative impacts and any particular groups affected	Recommendations for improvement/mitigation	Action taken by Clinical Board / Corporate Directorate Make reference to where the mitigation is included in the document, as appropriate
Well-being Goal – A globally responsible Wales			

Please answer question 8.1 following the completion of the EHIA and complete the action plan

<p>8.1 Please summarise the potential positive and/or negative impacts of the strategy, policy, plan or service</p>	<p>The Impact Assessment has found that, by revising the retirement procedure there is now clearer support for staff and their line managers to ensure the retirement process is informative, transparent and fair.</p>
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Action Plan for Mitigation / Improvement and Implementation

	Action	Lead	Timescale	Action taken by Clinical Board / Corporate Directorate
<p>8.2 What are the key actions identified as a result of completing the EHIA?</p>	Education and support for managers who are supporting retirement should continue	People Team	Ongoing	
<p>8.3 Is a more comprehensive Equalities Impact Assessment or Health Impact Assessment required?</p> <p>This means thinking about relevance and proportionality to the Equality Act and asking: is the impact significant enough that a more formal and full consultation is required?</p>	Not required. This is a procedure for Public Health Wales staff and can be accessed by all.			

	Action	Lead	Timescale	Action taken by Clinical Board / Corporate Directorate
<p>8.4 What are the next steps?</p> <p>Some suggestions:-</p> <ul style="list-style-type: none"> • Decide whether the strategy, policy, plan, procedure and/or service proposal: <ul style="list-style-type: none"> ○ continues unchanged as there are no significant negative impacts ○ adjusts to account for the negative impacts ○ continues despite potential for adverse impact or missed opportunities to advance equality (set out the justifications for doing so) ○ stops. • Have your strategy, policy, plan, procedure and/or service proposal approved • Publish your report of this impact assessment • Monitor and review 	<p>This is a procedure for Public Health Wales staff and can be accessed by all..</p> <p>The procedure needs to be implemented, monitored and evaluated to ensure it continues to be fit for purpose and takes account of any upcoming changes in pensions legislation.</p>	<p>People Team</p>	<p>As required</p>	

