

Equality Screening Template

Part 1: Policy Scoping

The first stage of the screening process involves scoping the policy under consideration. The purpose of policy scoping is to help prepare the background and context and set out the aims and objectives for the policy being screened. At this stage, scoping the policy will help identify potential constraints as well as opportunities.

Information about the policy

Name of the policy: Early Retirement Discretionary Policy
Is this an existing, revised or a new policy? Replacement policy
What is it trying to achieve? (intended aims/outcomes) Updated clear guidelines for Early retirement and instances when discretion may be exercised.
Are there any Section 75 categories which might be expected to benefit from the intended policy? If so, explain how. This policy applies to all categories of staff who have opted to join the NILGOSC pension scheme.
Who initiated or wrote the policy? People Services and Equality
Who owns and who implements the policy? People Services and Equality

Implementation factors

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

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

Other policies with a bearing on this policy

What are they? Redundancy/Retirement/Dependents Policy

Who owns them? People Services and Equality

Available evidence

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

Section 75 category	Details of evidence/information
Religious Belief	N/A
Political Opinion	N/A
Racial Group	N/A
Age	Driven by age due to legislation for those over 55 years of age in line with pension regulations.
Marital Status	N/A
Sexual Orientation	N/A
Men and Women generally	Differences between males being 65 and females 60 before they are eligible for retirement. For individuals who are not in the NILGOSC pension scheme they cannot benefit for any discretionary payments and they have to resign.
Disability	Ill health may lead to a longer term disability.
Dependants	Discretion is considered for those with exceptional circumstances with dependents such as sick spouse, civil partner, co-habiting partner, parent, child, sibling and other dependents.

Needs, experiences and priorities

Taking into account the information referred to previously, are there different needs, experiences and priorities of each of the following categories, in relation to the particular policy/decision? Please specify details as appropriate for each of the Section 75 categories.

Section 75 category	Yes/No/ Not sure	If yes, please provide details of needs/experiences/priorities
Religious Belief	n/a	
Political Opinion	n/a	
Racial Group	n/a	
Age	Yes	<p>85 year rule means that staff who are not in the scheme before September 2006 may lose protection for reduction.</p> <p>Also those over 55 have the advantage of claiming their benefits as opposed to those under 55 are not entitled.</p>
Marital Status	n/a	
Sexual Orientation	n/a	
Men and Women generally	Yes	Differences made with between men and women due to their ages.
Disability	Yes	Decision is made by NILGOSC medical practitioners.
Dependants	Yes	Dependent may not be deemed as listed and the decision is based on the level of dependency and evidence provided.

Part 2: Screening Questions

1. 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	n/a	
Political opinion	n/a	
Racial group	n/a	
Age	Those under 55 years of age cannot qualify for discretionary although this is not feasible as actual costs would override any benefits. However, this is driven by legislation.	Minor
Marital status	n/a	
Sexual orientation	n/a	
Men and women generally	All staff are given the opportunity to join NILGOSC pension scheme with the option to transfer from private and teachers pension.	Minor
Disability	Illness may not be classified by NILGOSC as being a disability and then payment will be withheld.	None
Dependents	Decision as it is discretionary different circumstances and evidence provided and decision may have detriment on individuals as it is driven by costs	Major

2. Are there opportunities to better promote equality of opportunity for people within the Section 75 categories?

Section 75 category	Is <u>Yes</u>, provide details	If <u>No</u>, provide reasons
Religious belief		
Political opinion		
Racial group		
Age		
Marital status		
Sexual orientation		
Men and women generally	To ensure all staff are aware of options/schemes available, awareness of their benefits and adequate guidance provided.	
Disability		
Dependents		

3. 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	N/A	
Political opinion	N/A	
Racial group	N/A	

4. Are there opportunities to better promote good relations between people of different religious belief, political opinion or racial group?

Good relations category	If <u>Yes</u>, provide details	If <u>No</u>, provide reasons
Religious belief	N/A	
Political opinion	N/A	
Racial group	N/A	

Additional considerations

Multiple identity

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? **Yes** **No**
(For example: disabled minority ethnic people; disabled women; young Protestant men; and young lesbians, gay and bisexual people).

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

Part 3: Screening decision

Decision	Please select as appropriate
The policy has been 'screened in' for equality impact assessment.	<input type="checkbox"/>
The policy has been 'screened out' for equality impact assessment.	<input checked="" type="checkbox"/>
If the decision is to subject the policy to an equality impact assessment, please provide details of the reasons.	
If the decision is not to conduct an equality impact assessment, please provide details of the reasons.	
Although it has been concluded that there are 2 minor and 1 major impacts in respect of three of the Section 75 categories, it has been decided not to conduct an EQIA as the policy complies with all relevant legislation.	

Mitigation

If the decision is not to conduct an equality impact assessment you may consider mitigation to 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 or opportunity and/or good relations?	Yes	No
		<input type="checkbox"/>
If yes, give the reasons to support your decision, together with the proposed changes/amendments or alternative policy.		

Timetabling and prioritising

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.

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 CCEA's functions	

The total rating score will be used to prioritise the policy in rank order with other policies screened in for equality impact assessment. This list of priorities will assist CCEA in timetabling.

Part 4: Monitoring

Where a policy has been amended or an alternative policy introduced, effective monitoring will help you identify any future adverse impact arising from the policy, which may lead to carrying out an equality impact assessment, as well as helping with future planning and policy development.

Part 5: Approval and authorisation

Screened by	Position and Department
Maureen Mckay	Senior HR Advisor, PSE
Wendy Morrison	HR Advisor, PSE

Approved by:	Lisa Johnston
Position:	People Services Manager
Date:	6 th September 2011