



Your Homes
Newcastle

Equality Impact and Needs Assessment Form 2010

PART 1 – Initial Assessment

Step 1 – Preparation

Directorate:

Chief Executives

Business Development

Tenancy Services

Finance & Resources

Service:

Human Resources

Name of policy, strategy or service:

Flexible Retirement Procedure

New

Existing

Lead Officer: Ceri Liddell – HR Consultant

Members of EINA group (name & title):

① **Stuart Bagnall – Principal Investment Officer**

② **Steve Foster – HR Consultant**

③ **Kim McMaster – Young People’s Service Manager**

④ **Helena Hammock - Assistant Performance Management and Policy Officer**

⑤ **Mark Halpin – HR Consultant**

⑥ **Simone Doyle – Equality & Diversity Manager**

Dates of assessment:

Start date: 25 July 2011

End date: 3rd October 2011

Step 2 - Aims & purpose

(Please see page 10 of the toolkit for further information)

What is the main aim of the policy, procedure or function?	The policy informs employees who are aged 55 and over of the option to apply for flexible retirement. Employees can apply to wind down to retirement by reducing their hours and/or grade, and having their pension released while they are still at work. This can help employees to avoid a sudden switch from full-time working to retirement, and benefits YHN by retaining valuable knowledge and skills.
How does this contribute to E&D in YHN?	In implementing this policy managers must ensure that all employees are treated fairly and within the provisions and spirit of YHN's Equality Policy. In particular, YHN has a statutory obligation to assess the potential for the policy to discriminate on any grounds as detailed in the Equality Act 2010.
What are the outcomes and associated aims you are trying to achieve?	This can help employees to avoid a sudden switch from full-time working to retirement, and benefits YHN by retaining valuable knowledge and skills.
Which individuals, organisations or stakeholders are likely to have an interest in or likely to be affected by the policy or function?	All employees, temporary or permanent are likely to have an interest in this policy, as well as, recognized trade unions. Managers in the business will have an interest in this policy also.
Who has been consulted?	Consultation will include the following stakeholders; Finance & Resourcing Committee, Management Team, Recognised Trade Unions, Human Resources Team, Diversity Manager.
Who has overall responsibility for this policy, strategy or service? And is there a shared responsibility? (e.g. another department, authority or organisation.)	Human Resources
Does the development/review of the	In implementing this policy managers must ensure that all employees are

<p>policy or function present us with an opportunity to promote equality of opportunity and good community relations? Please explain.</p>	<p>treated fairly and within the provisions and spirit of YHN's Equality Policy. In particular, YHN has a statutory obligation to assess the potential for the policy not to discriminate on any grounds as detailed in the Equality Act 2010.</p>
<p>What are the main policies, legislation or other documentation that relates to this policy or function?</p>	<p>Equality Act 2010 Retirement Policy Capability Policy & Procedure Equality Policy</p>

Step 3 – Information and data

(Please see page 11 of the toolkit for further information)

What qualitative data has been considered in the development/review of the document/service?

Best practice policy examples, the organisations existing terms and conditions and processes.

What quantitative data has been considered in the development/review of the document/service?

Associated costs of this flexible retirement policy were considered as part of its policy review.

Are there any gaps in the data? What actions are required to address this?

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Step 4 – Assessing the impact

(Please see page 12 of the toolkit for further information on positive & negative impacts)

All Strands	Impact +/-	Details of impact identified	Evidence
Age	Impact +/-	Details of impact identified	Evidence
	+/-	<p>Potentially allows older employees to remain in employment longer, whilst satisfying any work life balance considerations.</p> <p>Cost of lost hours and cost to the business may prevent business cases being agreed.</p> <p>This may have an negative impact on the younger generation of employees within YHN as there may be the perception that their career aspirations cannot be realized due to the lack of staff retiring.</p>	
Disability	Impact +/-	Details of impact identified	Evidence
Gender	Impact +/-	Details of impact identified	Evidence
Race	Impact +/-	Details of impact identified	Evidence
Religion, Faith or Belief	Impact +/-	Details of impact identified	Evidence

Sexual Orientation	Impact +/-	Details of impact identified	Evidence
Pregnancy & Maternity	Impact +/-	Details of impact identified	Evidence
Gender Reassignment	Impact +/-	Details of impact identified	Evidence
Marriage & Civil Partnership	Impact +/-	Details of impact identified	Evidence
Other	Impact +/-	Details of impact identified	Evidence

If negative impacts have been identified, follow step 5 from the toolkit (this step does not need to be documented) and then go to Step 6. If no impacts have been identified, please go to Part 3.

Step 6 – Improvement Plan

(Please see page 13 of the toolkit for more information)

Recommendations & actions for Flexible Retirement Procedure			
All Equality Strands	Action	Responsible Officer	Completion Date

If you have identified actions to eliminate all of the negative impacts please go to Part 3.

PART 3 – Publishing

Name of policy, strategy or service:

Flexible Retirement Procedure
Human Resources

Summary:

The representatives of the EINA met and discussed this policy but could find no negative impacts in terms of equality and diversity.

In terms of addressing the fact that the abolition of the retirement age may have a negative impact on the younger generation of employees within YHN as there may be the perception that their career aspirations cannot be realized due to the lack of staff retiring. YHN are currently undertaking a lot of work around talent management and succession planning in order to mitigate this. Furthermore YHN operates a comprehensive PDP process during which employees can discuss and work towards their longer term career aspirations. YHN also provides ILM training to ensure employees can achieve managerial competence. YHN have also just produced a Secondment Policy, so that employees can gain experience and broaden their knowledge, skills and experience in other department/organisations.

Complete:

- Initial Assessment
- Full Assessment

Lead Officers signature:

[Signature area]

Diversity Officer agreed & signed:

[Signature area]

Director of Service agreed & signed:

[Signature area]