



Flexible Retirement Policy and Options

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Part of Trust's publication scheme	Yes

The East of England Ambulance Service NHS Trust has made every effort to ensure this policy does not have the effect of unlawful discrimination on the grounds of the protected characteristics of: age, disability, gender reassignment, race, religion/belief, gender, sexual orientation, marriage/civil partnership, pregnancy/maternity. The Trust will not tolerate unfair discrimination on the basis of spent criminal convictions, Trade Union membership or non-membership. In addition, the Trust will have due regard to advancing equality of opportunity between people from different groups and foster good relations between people from different groups. This policy applies to all individuals working at all levels and grades for the Trust, including senior managers, officers, directors, non-executive directors, employees (whether permanent, fixed-term or temporary), consultants, governors, contractors, trainees, seconded staff, homeworkers, casual workers and agency staff, volunteers, interns, agents, sponsors, or any other person associated with the Trust.

All Trust policies can be provided in alternative formats.

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1. Introduction

There are many ongoing changes to both the demographics of our workforce and the pension schemes to which our employees are contributing to. The following guidance covers all options available to employees with regards to Flexible Retirement within the NHS Pension scheme, it also, specifically highlights the process for Retiring and returning to work within East of England Ambulance Service Trust.

Employees will need to know which schemes they have been paying into to review the potential options open to them.

It is strongly recommended that you also look at the up to date information on the NHS Pensions Website and their guides on the schemes:

<http://www.nhsbsa.nhs.uk/Pensions.aspx>

Prior to any decision to retire it is also strongly advised that employees talk to the Trust's Pensions specialist for information. They may also wish to attend a pre-retirement course which can be booked through the Human Resources Department.

Prior to any decision to retire it is also strongly advised that employees take independent financial advice. They may also wish to attend a pre-retirement course which can be booked through the Human Resources Department.

2. What is flexible retirement?

Retirement has traditionally been an 'all or nothing' choice where work stops, and retirement begins. In recent years, we have seen trends for people leaving employment and taking their pension – often before they can access their full benefits – and then returning to some form of employment to supplement their pension income.

Now and increasingly in the future, employees are facing a later retirement age before they can access their pension benefits, and many are concerned that they will not be able to continue working in the same way to a later age.

In the NHS Pension Scheme there are a number of options that allow changes to the way in which people work without a major or negative impact on their future pension and also changes their need to leave work, and the pension scheme, completely when making some of these changes. These are often referred to as 'flexible retirement options' and are defined as providing flexibility regarding the age at which an employee retires, the length of time an employee takes to retire or the nature and intensity of work in the lead up to final retirement.

Flexible retirement arrangements that support a longer working life can also benefit employees by:

- supporting work/life balance considerations including caring responsibilities and flexible working.
- allowing employees to prioritise their own health and wellbeing; and

- allowing skills to be valued and retained whilst changing the physical demands of work and working arrangements (e.g. responsibilities, shift patterns) providing a range of choice about your approach to retirement or working longer.

3. Possible retirement age

From April 2015, the Normal Pension Age (NPA) that members can receive their pension under the 2015 NHS Pension Scheme arrangements (without reduction for early payment) will be set equal to their State Pension Age (SPA). For 70 per cent of NHS employees this will mean their pension age is between 65 and 68 years old. For example, if you were born in 1971 your state pension age is 67, but if you were born in 1983 it is 68.

NB please note that in the 1995 NHS Pension scheme the NPA remains at 60 (without reduction for early payment) and in the 2008 NHS Pension scheme it remains at 65.

Voluntary early retirement (restrictions apply) from age 50 (1995 section) or 55 (2008 section) (members will receive a reduced pension because the pension will be paid earlier and for longer).

You can find out your SPA and other useful information at <https://www.gov.uk/check-state-pension>

4. Flexible Retirement Option Details

i) Step down (available in 1995,2008 and 2015 schemes)

You may be able to 'step down' to a different role to reduce your level of responsibility whilst remaining in NHS employment. Depending on your age at the time you step down, you may be able to protect a higher level of pay for the calculation of your future pension benefits so that the impact of a change in work only affects your future pension earned after stepping down.

This option may support you to remain in work in the run up to Normal Pension Age as working at a lower level may feel more achievable and may be more financially advantageous than retiring from the organisation completely (see retire and return information below).

ii) Wind down (available in 1995 and 2008 schemes)

You may be able to 'wind down' to retirement by remaining in your current post but reducing the number of hours or days you work. Pensions for part-time employees are calculated on the whole-time equivalent salary and not the actual salary. Therefore, the only impact this may have is on the length of your membership, as it will take longer to build up future membership if you are working less than full time hours. For example, if you wind down to work half time hours it will take two years to build up one year of pension benefits, but the final salary used to calculate benefits will not be affected so long as your salary band or level remains the same. If your salary band or level reduces, please see the previous information on step down. This option may support you to remain in work for a longer period before retirement and could be used in conjunction with a flexible working request.

iii) Draw down (available in 2008 and 2015 schemes but not in the 1995 scheme)

Draw down allows you to access some of your pension benefits without having to retire from employment. You can take between 20 per cent and 80 per cent of your

pension benefits, stay working and continue to build up future membership in the scheme. You can draw down on up to two occasions before retiring completely.

Please note that any benefits drawn down before your NPA will be reduced to take account of their early payment. If you are aged over your NPA and your pay is reduced by at least 10 per cent, you can also partially retire and take some pension benefits. The pensionable pay must be reduced for at least a year or you will cease to be eligible for the pension you have drawn down. This option can be attractive if you need to supplement your income in the run up to full retirement.

iv) Late retirement enhancement (available in 2008 and 2015 schemes but not in the 1995 scheme)

If you continue working past your NPA and you have not drawn down from your pension at all, **your pension benefits will be increased** by the application of late retirement factors. You can benefit from working longer to achieve an increase in pension benefits when you come to draw your pension

v) Early retirement reduced buy-out (ERRBO) (only available in the 2015 scheme)

This new provision to the 2015 pension scheme arrangements allows employees – and/or their employer to make additional contributions to the scheme that will allow you to retire earlier than your NPA without any early retirement reduction (although not more than three years earlier than your NPA and not allowing for a retirement age of less than 65 years old). It is known as ‘buying out’ the early retirement reduction that would otherwise apply. For example, an employee with an NPA of 68 could make arrangements to buy out three years’ worth of early retirement reduction so that they can retire at age 65 without suffering any reduction in the pension benefits. However, a member of staff with a future NPA of 66 could only buy out a one-year reduction, allowing them to retire at age 65. They could not buy out the full three years as this would take their retirement below age 65.

There are strict time limits on when you can enter into such a buy-out arrangement. More

information is available on the NHS Pension Scheme website. The Ambulance Sector have also implemented from 01 April 2016, an employer contribution towards the costs of buying out additional years under ERRBO. This means a 50% contribution will be paid for all eligible employees who fall within the following categories.

- Operational employees rostered to deliver direct patient care. Such as ECAs, Technicians, Paramedics.
 - Patient Transport Service employees
 - Emergency Operations Centre employees
 - Managers who deliver direct patient facing care for at least 60% of their time.
- Employees who wish to find out if they are eligible for this contribution can submit an application, following the ERRBO process on the NHS Pensions website.

vi) Retire and return to NHS employment (available in 1995, 2008 and 2015 schemes)

Once you have reached the minimum pension age of the pension scheme you can choose to retire, claim your pension benefits and then return to NHS employment. If you retire before NPA your benefits will be reduced on account of them being paid

early. You should also be aware of the timings of your return to NHS employment as you are expected to have a break in service before you do so. If you do not wish to break your service you may wish to consider ‘draw down’ (if you are eligible – see section 5, Table 1).

Retirees are now able to have a break in service of at least 24 hours between retirement and returning to work. Also, NHS Pension Scheme has lifted the restriction of a maximum of 16 hours work per week for one month after retirement is suspended. Therefore, up to full time working is permitted from the first day of service.

If you retire from the 1995 section you may return to NHS employment but cannot continue to contribute to the NHS Pension Scheme, unless you retire on ill health grounds and are under the age of 50. You may however, be able to join an alternative pension scheme under auto enrolment.

Further details can be supplied from the Trust’s Pension specialist via payroll r. If you retire from the 2008 section or the 2015 scheme, you may return to NHS employment and will be able to continue contributing to the NHS Pension Scheme.

The aims of “retire and return” are to:

- Enable the NHS to retain the skills, knowledge and experience necessary to deliver safe patient care
- Help support the health and wellbeing of older employees as they approach retirement and wish to continue working
- Ensure that the overall workforce costs are managed in line with budgets

vii) Return to Work after Ill-health Retirement

The information in this part of the policy relates to employees who have retired from active membership with an ill health pension. It does not apply to employees who have accessed their deferred benefits early due to ill health.

The rules for re-joining the Scheme are different depending on which Section or Scheme employees were last a member of, the date they retired, the type of ill health pension employees are receiving and their age at the date of returning to employment.

Employees are advised to note that the temporary suspension of re-employment regulations due to COVID-19, do not apply to members who have retired early due to ill health. The abatement/ restriction rules detailed in the NHS Pensions ill health re-employment factsheet remain applicable during this period.

5. What kind of flexible retirement options are available Summary of Options–Table 1.

The flexible retirement options that may be available to you depend on which section of the NHS Pension Scheme you are in and in which sections (if more than one) you have pensionable membership.

	1995 section	2008 section	2015 scheme	Need Managerial Approval
Step down	Yes	Yes	Yes	Yes

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Wind down	Yes	Yes	Yes	Yes
Retire and return*	Yes	Yes	Yes	Yes
Draw down	No	Yes	Yes	No
Late retirement enhancement	No	Yes	Yes	No
Early retirement reduction buy out – All NHS	No	No	Yes	No
Early retirement reduction buy out - Ambulance Sector Only	No	No	Yes	Yes

Table 1

You can find out which section or scheme you are in through your **Total Reward Statement or Annual Benefits Statement**. From April 2015, you may have membership in more than one part of the scheme – so will need to ensure that if you wish to take up flexible retirement, the option you chose is applicable to all your pensionable membership.

6. Procedure for Flexible Retirement Options

Flexible Options	Need Managerial Input	Procedure
Step down	Yes	Apply for new role through recruitment processes. Contact the Trust's pensions specialist via Payroll for information regarding protection.
Wind down	Yes	Request to reduce your hours through your line manager. There is no right but needs to be within the needs of the service. Contact the Trust's pension specialist via payroll for a forecast regarding retirement on a certain date.
Retire and return <i>1.NB. members of the 1995 section will not be eligible to rejoin the NHS Pension Scheme upon their return to work.</i>	Yes	See detailed process below (section 7)
Draw down	No	. Contact the Trust's pension specialist via payroll for estimates and information on the scheme.
Late retirement enhancement	No	. Contact the Trust's pension specialist via for estimates and information on the scheme.
Early retirement reduction buy out -General	No	. Contact the Trust's pension specialist via for estimates and information on the scheme. (3 months of joining)
Early retirement reduction buy out Ambulance Sector Only	Yes	. Contact the Trust's pension specialist via payroll for estimates and information on the scheme.

Please note that due to changes in the NHS Pension scheme, most types of estimates now have to be requested direct from NHS Pension Agency (NHSPA) by the member. These requests may incur a charge, which is to be paid by the scheme member at the time of applying, employees will need to download the relevant form from the website, complete the details and forward to NHSPA with their remittance.

7. Process for Retiring and Returning to post within East of England Ambulance Service Trust:

Within East of England Ambulance Service NHS Trust, employees are most frequently requesting to retire from their posts and then return to work whilst in receipt of their pension. The following guidance sets out the process that needs to be followed for employees wishing to explore this option.

Employees do not have the right to 'Retire and Return' - they only have the option to request to do so. A request must be submitted prior to employees arranging to retire and they will need to give 3 months' notice to retire. As such, discussions about the possibility of retiring and returning need to be commenced in a timely manner.

NB If a Trust Board Level Director wishes to retire and return, the request will need to be approved by both the Remuneration Committee and the Chief Executive Officer.

Considerations for Employees including breaks and hours:

Employees who are considering retiring should recognise that there is no right to return to the same role they are currently in, or indeed any role within the Trust or the NHS after retirement. There will need to be an assessment undertaken of the relevant service and of the impact both on the service and other employees of any retirement and eventual return.

Retirees are now able to have a break in service of at least 24 hours between retirement and returning to work. Also, NHS Pension Scheme has lifted the restriction of a maximum of 16 hours work per week for one month after retirement is suspended. Therefore, up to full time working is permitted from the first day of service. Once the pension has been awarded operational HR, taking advice from the Trust's pension specialist, will be able to advise employees on the maximum number of hours that they will be able to work to ensure that they do not break this rule. Not applicable for voluntary early retirement (VER), only applies to special class, or retirements on ill health retirements (IHR) under age 50 and who re-joined the scheme.

For employees over 60 years of age, there are no restrictions on the number of hours they are able to work after the first calendar month.

Employees will return to work on a new contract of employment, with new dates for their reckonable service. This will affect rights to redundancy pay and will cease any protection of pay, excess travel, etc. that may have been paid prior to retirement.

NB for those retiring on Voluntary Early Retirement [VER] and who have pensionable service prior to 5th April 1997, a Guaranteed Minimum Pension (GMP) check is

required. Please contact the Trust's Pensions specialist via payroll as soon as possible as they may take up to 6 weeks to complete.

Actions for the Employee

Employees will need to contact the Trust's Pensions specialist prior to their application to seek guidance on their pension forecast and the process to apply for their pension. The application to access pension benefits is a separate process to applying to Retire and Return.

You will need to complete the application form in **Appendix 2**. This form includes:

- the date you wish to retire.
- the date you wish to return.
- the hours you will be able to return to (ensuring that the pension rules are adhered to);
- how you propose this will impact upon the team; and
- for clarity, which role you are proposing to return to.

Employees will then need to discuss their application and submit the form to their line manager who in turn will pass it on to their equivalent Senior / Departmental Manager and discuss the impact of the proposals on the team, workforce plans and the individual employee. If approved, this will then be signed by the relevant manager.

If the application is granted:

The submission of the form and acceptance by the Approving Manager will be taken as resignation from the Trust. You are required to give at least 3 months' notice to ensure that your pension can be paid on the correct date.

Please note that no pension applications can be passed on to the Trust's Pensions specialist without a Termination of Employment on HR and Payroll System (ESR). As such Managers must ensure that they are processing the employee's termination as soon as it has been agreed.

When returning to work after retiring, a Notification of Appointment form must be completed to ensure that employees are set back up on the ESR HR and Payroll system, so that employees can be paid on return to work. This must be sent with the completed application form to the relevant HR Recruitment & Resourcing Team.

Employees then need to be set up again as if a new starter\employee of the Trust. Any annual leave at the date of termination must be put on the Termination form and this will extend the last date of service for the purpose of pensions only. This will therefore need to be taken into account when returning to the Trust to ensure that the required breaks have been taken.

Employees will need to liaise with operational HR and the Trust's Pensions specialist at every step of the process to ensure completion of all relevant forms prior to retirement.

Under the agreement to allow employees to return to work, the previous ESR record will be ended, and employees will receive a P45.

Prior to re-commencing employment, employees will receive an offer letter from the HR Team, which will ask employees to carry out ID/Right to Work/DBS/Occupational Health checks etc., as per a new starter.

These checks will need to be completed to arrange for employees to be set back up on the ESR/HR and Payroll system, so that employees can be paid and for a contract of employment to be issued. This is because employees have agreed to take a break in employment with the Trust, and these checks are mandatory under employment legislation & NHS Employers requirements.

If the application is declined:

If an application to Retire and Return is declined an employee will need to decide if they still wish to access their pension or if they wish to remain in their current post. Employees do have the right to appeal the decision. - **see section 9**

In line with flexible working requests, employees cannot request to Retire and Return again for 12 months after submission of the initial form. Employees can of course choose to retire at any time.

8. Management guidance when considering Retire and Return requests

When an employee Retires and Returns, they are in effect returning to a post that has not been the subject of a normal recruitment process. The Trust needs to be satisfied therefore that if the vacancy were to arise without a request for an employee to return, there is a business requirement for the post to be filled in the way that is being proposed and that the monies would not be utilised in an alternative way.

Employees have the right to request to Retire and Return but any agreement for them to do so needs to be reviewed in relation to the post, workforce plans, timing and the individual requesting the retire and return. The current working pattern of the team and how the working pattern requested will fit in with this should also be taken into account.

Managers will need to consider the requirement for the role within the team, performance and attendance records, financial requirements of the Trust and succession plans for the team.

The fact that one Retire and Return request has been approved should not set a precedent within the team - each application will need to be considered on its individual merits and timing.

The Managers will need to consider:

1. the requirement for the post to be filled through “retire and return” considering Cost Improvement Pressures.
2. the standard of the Employees work and attendance.
3. whether the hours proposed can be accommodated / meet service needs.
4. succession planning and the potential impact of the employees return upon the team.
5. whether it is in the best interests of the team and service.
6. the longer-term workforce / service plans for the post and team and how this request fits in to those plans.

7. equality requirements
8. value for money
9. the employees' competence (skills, knowledge and experience) against the requirements of the post

Managerial Actions:

The line manager will discuss the application with the employee and request submission of the form in **Appendix 2** if this has not already been completed.

If the line Manager is not themselves at Senior / Departmental Manager level, or more senior, they will then pass the application on and advise upon the impact of the request upon the team.

As a minimum, the Senior Manager (or equivalent overall budget holder/decision maker) of the service will have the final authorisation on whether the request can be accommodated within the team and will need to sign the form.

The authorising Manager will then advise the line manager who in turn will advise the employee no later than 14 calendar days after the application was first submitted.

9. Appeal Procedure

Employees can appeal against the decision not to grant their request to Retire and Return. A full explanation of the reason for the appeal will need to be stated. Employees wishing to appeal should do so in writing addressed to the Director of Workforce

10. Withdrawal of Request

Where an employee chooses to withdraw their application to work flexibly, they will not be able to submit a further application until 12 months from the date the original application was made. Exceptions may be made at the discretion of the manager, for example in the event of a change in circumstances of the employee or service.

11. Key information regarding payment of pension

Before a pension can be paid, the organisation will write to you and ask for a form to be completed regarding the appropriate break, hours and pay on return to work. This is to ensure that you are complying with the rules of the scheme. This form needs to be completed in conjunction with operational HR and the Trust's Pensions specialist who in turn will require proof from your manager.

[It should be noted for those who are in receipt of their pension and for whom there is a limit on earnings, operational HR will liaise with the Trust's Pension specialist to ensure that the hours worked are not in excess of the limit. Any non-compliance may result in the ceasing of your pension payments]

12 Further Information

Should you have any queries or questions there are a number of sources of information that can be accessed. These are.

East of England Ambulance Service Trust's Pensions specialist.

NHS Pensions Authority Website: <http://www.nhsbsa.nhs.uk/pensions>: This website will have the latest guides for Members; this includes guides on 1995/2008 and separately the 2015 scheme. There is also a retirement booklet available for the members of the 1995/2008 scheme.

You can find out your State Pension Age (SPA) calculator:

<https://www.gov.uk/check-state-pension>

For booking on Pre-retirement courses please contact your local Human Resources team.

13 Other Helpful Information Links

The NHS Pension factsheet can be found on the following website via this link <https://www.nhsbsa.nhs.uk/sites/default/files/2017-08/Return%20to%20work%20after%20ill%20health%20retirement%20factsheet%20%28V7%29%2008.2017.pdf>

Below are links to factsheets outlining the guidelines for employees in receipt of **Tier 1** or **Tier 2** ill health pension and they describe the restrictions for employees who wish to return to work. Employees in receipt of ill health retirement pension are encouraged to seek advice on the impact on their pension when considering returning to paid employment within the NHS.

https://contactcentreservices.nhsbsa.nhs.uk/selfnhsukokb/AskUs_Pensions/en-gb/5095/working-after-ill-health-retirement/16674/can-i-return-to-work-if-i-am-receiving-a-tier-1-ill-health-pension

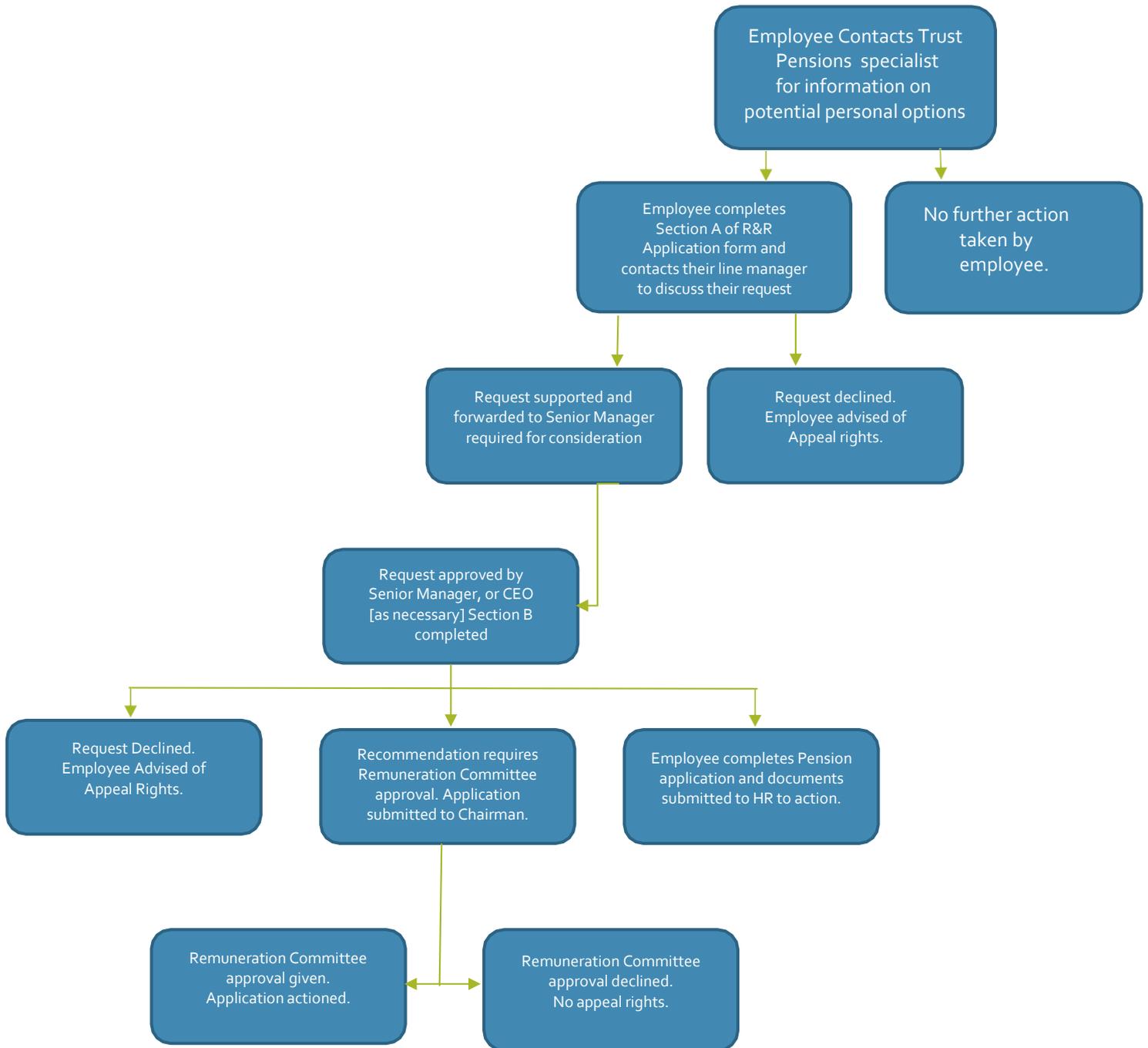
https://contactcentreservices.nhsbsa.nhs.uk/selfnhsukokb/AskUs_Pensions/en-gb/5095/working-after-ill-health-retirement/16673/can-i-return-to-work-if-i-am-receiving-a-tier-2-ill-health-pension

14. Policy Review

This policy will be reviewed on a three yearly basis or amended in the light of new employment legislation and/or relevant case law or if a significant issue arises with its operation.

Appendix 1

Retire and Return Request Flowchart



Appendix 2



EAST of ENGLAND AMBULANCE SERVICE TRUST FLEXIBLE RETIRMENT APPLICATION: RETIRE AND RETURN

Applications for any other schemes should be made directly with the Trust Pensions Specialist

PLEASE NOTE THAT ALL APPLICATIONS SHOULD BE COMPLETED AT LEAST 3 MONTHS PRIOR TO THE RETIREMENT DATE REQUESTED.

Whilst it should be recognised that there is no automatic right to return to the same or any role within the Trust for employees considering retirement, the Trust is committed to facilitating a return in the most practical way where there is benefit to both the employee and the Trust. It is vitally important that knowledge and skills are retained wherever possible, and this should be the priority when considering any kind of flexible retirement request.

Managers will need to take into account the requirement for the role within the team, performance and attendance records, financial requirements of the Trust and succession plans for the team (please refer to section 8). No retire and return to work agreement would set a precedent within the team and each application will be considered on its merits.

Employees are advised to contact the Trust's Pensions Specialist prior completing this application to seek guidance on their pension forecast.

(NB as at April 2020 Due to the temporary Covid-19 restrictions employees are no longer required to have a 24-hour break and the restriction to not work more than 16 hours per week has been temporarily suspended. [further details are contained within this guidance document].)

Section A: EMPLOYEE INFORMATION

Employee Name	
Date of Birth	
Assignment Number	
Current Role	
Current Grade	
Directorate	
Division/Department	
Line Manager Name	
Line Manager Designation	
Retirement Date	
Return to work Date	
Maximum number of hours requested and which have been confirmed by pension's authority.	
Return Role Requested	
Return Grade Requested	
Impact of your application on Trust, Colleagues, yourself, etc.	
Signed:	Date of Application:

Section B: MANAGEMENT CONSIDERATION/RESPONSES

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Name of Senior / Departmental Manager (or equivalent level)/ Director / CEO considering request:			
Request Considerations	YES	NO	N/A
Is there a requirement for the post to be filled through “retire and return” in light of Cost Improvement Pressures?			
Are there other displaced internal candidates on an “at risk” register?			
Is it likely that a displaced internal candidate could be suitable to fill this post?			
Does the employee have a good attendance record? please attach the records from the last 2 years]			
Does the employee have a good conduct history?			
Do you consider the employee to be the best candidate for this role?			
Does the employee have the competence (skills, knowledge and experience) against the requirements of the post?			
Is the standard of the employees work satisfactory?			
Can the hours proposed be accommodated and meet service needs?			
Does the return support succession planning and the potential impact of the employees return upon the team?			
Is the return in the best interests of the team and service?			
Does the return fit with the longer term workforce / service plans for the post and team?			
Does the return meet equality requirements?			
Is the return value for money?			
Does the employee meet the relevant retirement criteria through NHS Pension Agency?			
Are there any other reasons that need to be taken into account, if Yes, please specify			
Request granted:	YES / NO (Delete as applicable)		
If yes: What is the confirmed Retire Date:			
If yes: What is the confirmed Return Date:			
If yes: advise on any contractual or management conditions for the return:			
If no, advise of any possible alternatives if applicable:			
Signed:	Print Name:		
Designation:	Date:		
Authorised:	Print Name:		
Designation:	Date:		

OFFICIAL - Business data that is not intended for public consumption. However, this can be shared with external partners, as required

Appendix 3



Equality Impact Assessment

EIA Cover Sheet															
Name of process/policy															
Is the process new or existing? If existing, state policy reference number															
Person responsible for process/policy															
Directorate and department/section															
Name of assessment lead or EIA assessment team members															
Has consultation taken place? Was consultation internal or external? (please state below):															
The assessment is being made on:	<table border="1"> <tr> <td>Guidelines</td> <td></td> </tr> <tr> <td>Written policy involving staff and patients</td> <td></td> </tr> <tr> <td>Strategy</td> <td></td> </tr> <tr> <td>Changes in practice</td> <td></td> </tr> <tr> <td>Department changes</td> <td></td> </tr> <tr> <td>Project plan</td> <td></td> </tr> <tr> <td>Action plan</td> <td></td> </tr> </table>	Guidelines		Written policy involving staff and patients		Strategy		Changes in practice		Department changes		Project plan		Action plan	
	Guidelines														
	Written policy involving staff and patients														
	Strategy														
	Changes in practice														
	Department changes														
	Project plan														
Action plan															

	Other (please state) Training programme.
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Equality Analysis

What is the aim of the policy/procedure/practice/event?

Who does the policy/procedure/practice/event impact on?

- | | | | | | |
|---------------|--------------------------|-----------------------------|--------------------------|-----------------------------------|--------------------------|
| Race | <input type="checkbox"/> | Religion/belief | <input type="checkbox"/> | Marriage/Civil Partnership | <input type="checkbox"/> |
| Gender | <input type="checkbox"/> | Disability | <input type="checkbox"/> | Sexual orientation | <input type="checkbox"/> |
| Age | <input type="checkbox"/> | Gender re-assignment | <input type="checkbox"/> | Pregnancy/maternity | <input type="checkbox"/> |

Who is responsible for monitoring the policy/procedure/practice/event?

What information is currently available on the impact of this policy/procedure/practice/event?

Do you need more guidance before you can make an assessment about this policy/procedure/practice/event? Yes/No

Do you have any examples that show that this policy/procedure/practice/event is having a positive impact on any of the following protected characteristics? Yes/No, If yes please provide evidence/examples:

- | | | | | | |
|---------------|--------------------------|-----------------------------|--------------------------|-----------------------------------|--------------------------|
| Race | <input type="checkbox"/> | Religion/belief | <input type="checkbox"/> | Marriage/Civil Partnership | <input type="checkbox"/> |
| Gender | <input type="checkbox"/> | Disability | <input type="checkbox"/> | Sexual orientation | <input type="checkbox"/> |
| Age | <input type="checkbox"/> | Gender re-assignment | <input type="checkbox"/> | Pregnancy/maternity | <input type="checkbox"/> |

Please provide evidence:

Are there any concerns that this policy/procedure/practice/event could have a negative impact on any of the following characteristics? Yes/No, if so please provide evidence/examples:

- | | | | | | |
|---------------|--------------------------|-----------------------------|--------------------------|-----------------------------------|--------------------------|
| Race | <input type="checkbox"/> | Religion/belief | <input type="checkbox"/> | Marriage/Civil Partnership | <input type="checkbox"/> |
| Gender | <input type="checkbox"/> | Disability | <input type="checkbox"/> | Sexual orientation | <input type="checkbox"/> |
| Age | <input type="checkbox"/> | Gender re-assignment | <input type="checkbox"/> | Pregnancy/maternity | <input type="checkbox"/> |

Please provide evidence:

Action Plan/Plans - SMART

Specific

Measurable

Achievable

Relevant

Time Limited

Evaluation Monitoring Plan/how will this be monitored?

Who

How

By

Reported to