



## Equality Impact: Screening and Assessment Form

<b>Section 1: Policy details - policy is shorthand for any activity of the organisation and could include strategies, criteria, provisions, functions, practices and activities including the delivery of our service.</b>	
a. Name of policy or practice (list also any linked policies or decisions)	Retirement policy
b. Name of department	HR
c. Name of Lead	Nicola Anderson, Head of HR
d. Equality Impact Assessment Team [names, job roles]	Nicola Anderson, Head of HR
e. Date of assessment	August 2016
f. Who are the main target groups / who will be affected by the policy?	The policy has been written to provide information and support for all staff considering retirement.
g. What are the intended outcomes / purpose of the policy?	This policy aims to provide the best support and practical information to enable employees to experience as smooth a transition from work to retirement as possible.
h. Is the policy relevant to the General Duty to eliminate discrimination? advance equality of opportunity? foster good relations?	Yes
If yes to any of the three needs complete all sections of the form (2- 7) If no to all of the three needs provide brief detail as to why this is the case and complete only section 7 If don't know: complete sections 2 and 3 to help assess relevance	

<b>Section 2: Evidence, consultation and involvement</b>			
<b>Please list the available evidence used to assess the impact of this policy, including the sources listed below. Please also identify any gaps in evidence and what will be done to address this.</b>			
a. Previous consultation / involvement with community, including individuals or groups of staff as relevant. Please outline details of any involvement / consultation, including dates carried out and protected characteristics			
Details of consultations - where, who was involved	Date	Key findings	Protected characteristics
Policy Review Group, Senior Management Team, Trade union officials and members		This is a PIN policy so has been developed with input from volunteer staff from NHSScotland and partner organisations. The policy was issued for consultation, and all sectors of the workforce have had the opportunity to have their views considered. Following further post-consultation amendment, the PIN policy was approved by SWAG Committee.  Within SAS, staff and the Senior Management team have had the opportunity to provide views and feedback.	Age
As above		As above	Disability
As above		As above	Gender reassignment
As above		As above	Gender / sex
As above		As above	Marriage / civil partnership *
As above		As above	Pregnancy / maternity
As above		As above	Race
As above		As above	Religion / belief
As above		As above	Sexual orientation
As above		As above	Cross cutting - e.g. health inequalities - people with poor mental health, low incomes, involved in the

			criminal justice system, those with poor literacy, are homeless or those who live in rural areas. Other?
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	Available evidence
b. Research and relevant information	Reference to and compliance with PIN Guidelines
c. Knowledge of policy lead	
d. Equality monitoring information -- including service and employee information	
e. Feedback from service users, partner or other organisations as relevant	
f. Other	
g. Are there any gaps in evidence? Please indicate how these will be addressed	
Gaps identified	
Measure to address these; give brief details. Further research? Consultation? Other	
Note: specific actions relating to these measures can be listed at section 5	

<b>Section 3: Analysis of positive and negative impacts</b>			
<b>Please detail impacts in relation to the three needs specifying where the impact is in relation to a particular need - eliminating discrimination, advancing equality of opportunity and fostering good relations</b>			
<b>Protected characteristics</b>	<b>i. Eliminating discrimination</b>	<b>ii. Advancing equality of opportunity</b>	<b>iii. Fostering good relations</b>
<b>Age</b>			
Positive impacts	There is no compulsory retirement age, however , this policy supports staff who wish to retire and provides options for staff to reduce working hours prior to retirement.		
Negative impacts			
Opportunities to enhance equality			
<b>Disability</b>			
Positive impacts	No positive or negative impact identified during this review		
Negative impacts			
Opportunities to enhance equality			
<b>Gender reassignment</b>			
Positive impacts	No positive or negative impact identified during this review		
Negative impacts			
Opportunities to enhance equality			
<b>Gender / sex</b>			
Positive impacts	No positive or negative impact identified during this review		
Negative impacts			
Opportunities to enhance equality			
<b>Marriage / civil partnership</b>			

Positive impacts	No positive or negative impact identified during this review
Negative impacts	
Opportunities to enhance equality	
<b>Pregnancy / maternity</b>	
Positive impacts	No positive or negative impact identified during this review
Negative impacts	
Opportunities to enhance equality	
<b>Race</b>	
Positive impacts	No positive or negative impact identified during this review
Negative impacts	
Opportunities to enhance equality	
<b>Religion / belief</b>	
Positive impacts	No positive or negative impact identified during this review
Negative impacts	
Opportunities to enhance equality	
<b>Sexual orientation</b>	
Positive impacts	No positive or negative impact identified during this review
Negative impacts	
Opportunities to enhance equality	
<b>Cross cutting - e.g. health inequalities people with poor mental health, low incomes, involved in the criminal justice system,</b>	

<b>those with poor literacy, are homeless or those who live in rural areas. Other</b>	
Positive impacts	
Negative impacts	
Opportunities to enhance equality	
Note: specific actions relating to these measures can be listed at section 5	

<b>Section 4: Addressing impacts</b> <b>Select which of the following apply to your policy and give a brief explanation - to be expanded in Section 5: Action plan</b>	
	Reasons
a. <b>No major change</b> - the EQIA shows that the policy is robust, there is no potential for discrimination or adverse impact and all opportunities to promote equality have been taken	No adverse impact identified.
b. <b>Adjust the policy</b> – the EQIA identifies potential problems or missed opportunities and you are making adjustments or introducing new measures to the policy to remove barriers or promote equality or foster good relations	Not relevant
c. <b>Continue the development and implementation of the policy without adjustments</b> – the EQIA identifies potential for adverse impact or missed opportunity to promote equality. Justifications for continuing without	Not relevant

<p>making changes must be clearly set out, these should be compelling and in line with the duty to have due regard. See option d. if you find unlawful discrimination. Before choosing this option you must contact the Equalities Manager to discuss the implications.</p>	
<p>d. <b>Stop and remove the policy</b> - there is actual or potential unlawful discrimination and these cannot be mitigated. The policy must be stopped and removed or changed. Before choosing this option you must contact the Equalities Manager to discuss the implications.</p>	<p>Not relevant</p>

<b>Section 5: Action plan</b>					
<b>Please describe the action that will be taken following the assessment in order to reduce or remove any negative / adverse impacts, promote any positive impacts, or gather further information or evidence or further consultation</b>					
Action	Output	Outcome	Lead responsible	Date	Protected characteristic / cross cutting issue*
Not applicable					

\* list which characteristic is relevant - age, disability, gender reassignment, gender / sex, marriage and civil partnership, pregnancy and maternity, race, religion / belief, sexual orientation or cross cutting issue e.g. poor mental health, illiteracy etc

<b>Section 6: Monitoring and review</b>	
<b>Please detail the arrangements for review and monitoring of the policy</b>	
	Details
a. How will the policy be monitored? Provide dates as appropriate	Staff side and management feedback. Partnership meetings. Formal review after 2 years.
b. What equalities monitoring will be put in place?	
c. When will the policy be reviewed? Provide a review date.	August 2018



<b>Section 7: Sign off</b> <b>Please provide signatures as appropriate</b>			
Name of Lead	Title	Signature	Date
Nicola Anderson	Head of HR		August 2016
Completed form: copy of completed form to be retained by department and copy forwarded to Equalities Manager for publication on Service website			
Provide date this was sent			