

Equality & Health Impact Assessment for

Retire and Return Scheme

Please read the Guidance Notes in Appendix 1 prior to commencing this Assessment

Please note:

- The completed Equality & Health Impact Assessment (EHIA) must be
 - Included as an appendix with the cover report when the strategy, policy, plan, procedure and/or service change is submitted for approval
 - Published on the intranet and internet pages as part of the consultation (if applicable) and once agreed.
- Formal consultation must be undertaken, as required
- Appendices 1-3 must be deleted prior to submission for approval

Please answer all questions:-

1.	For service change, provide the title of the Project Outline Document or Business Case and Reference Number	Retire and Return Scheme
2.	Name of Corporate Directorate and title of lead member of staff, including contact details	Rebecca Kindred-Watkins, People and OD Advisor Rebecca.Kindred-Watkins@wales.nhs.uk Jenny Ansell, People and OD Advisor Service Manager Jenny.Ansell@wales.nhs.uk
3.	Objectives of strategy/ policy/ plan/ procedure/ service	To provide flexible retirement arrangements to support employees to work longer, retain valuable skills, knowledge and experience within the organisation, support work life balance, allow staff to prioritise health and wellbeing and provide choice to employees who approach retirement.

<p>4. Evidence and background information considered. For example</p> <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 • comments from those involved in the designing and development stages <p>Population pyramids are available from Public Health Wales Observatory and the 'Shaping Our Future Wellbeing' Strategy provides an overview of health need.</p>	<p>Consultation sought from Trade Union representatives. Drafted in partnership.</p> <p>Sought advice from senior colleagues within People & OD.</p> <p><u>Organisational Retire and Return Data</u></p> <ul style="list-style-type: none"> • Our current headcount is approximately 2200 as of January 2023. • The number of staff aged 50 and over (when some members may be able to take early retirement) is: 647 (30%) • This is broken down as follows: <table border="1" data-bbox="1025 699 1406 826"> <tr> <td>50-59</td> <td>527</td> </tr> <tr> <td>60-69</td> <td>115</td> </tr> <tr> <td>70 plus</td> <td>5</td> </tr> </table> <p>In terms of Gender, the workforce aged 50 or over is:</p> <ul style="list-style-type: none"> • 519 Female (80%) • 128 Male (20%) • The workplace aged 50 and over is broken down by Pay Band as below: <table border="1" data-bbox="1025 1102 1406 1310"> <tr> <td>Bands 2-4</td> <td>208</td> </tr> <tr> <td>Bands 5-7</td> <td>221</td> </tr> <tr> <td>Band 8a & above</td> <td>185</td> </tr> <tr> <td>M&D</td> <td>33</td> </tr> </table> 	50-59	527	60-69	115	70 plus	5	Bands 2-4	208	Bands 5-7	221	Band 8a & above	185	M&D	33
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There were 49 employees recorded in ESR as having retired and returned in the period 1/4/2020-specific date. 37 of those were female and 12 were men.

- Breakdown by Staff Group:

Additional Clinical Services	2
Administrative and Clerical	17
Allied Health Professionals	5
Healthcare Scientists	9
Medical and Dental	7
Nursing and Midwifery	9

- Breakdown by Pay Band:

Bands 2-4	4
Bands 5-7	17
Band 8a & above	21
M&D	7

5. Who will be affected by the strategy/ policy/ plan/ procedure/ service

All staff of Public Health Wales who near retirement age.

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 / Division. Make reference to where the mitigation is included in the document, as appropriate
6.1 Age For most purposes, the main categories are: <ul style="list-style-type: none"> • under 18; • between 18 and 65; and • over 65 	Positive impact for those over 50, as provides options for flexible retirement.		The scheme will be monitored and updated in line with good practice and other changes as required.
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	No differential impact		The scheme will be monitored and updated in line with good practice and other changes as required.

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<p>6.3 People of different genders: 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>		The Scheme applies equally to all staff.	The scheme will be monitored and updated in line with good practice and other changes as required
<p>6.4 People who are married or who have a civil partner.</p>	No differential impact		The scheme will be monitored and updated in line with good practice and other changes as required
<p>6.5 Women who are expecting a baby, who are on a break from work after having a baby, or who are breastfeeding. They are</p>	No differential impact		

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 / Division. Make reference to where the mitigation is included in the document, as appropriate
protected for 26 weeks after having a baby whether or not they are on maternity leave.			
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 scheme 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 scheme 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 scheme will be monitored and updated in line with good practice and other changes as required

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 / Division. Make reference to where the mitigation is included in the document, as appropriate
<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>No differential impact</p> <p>.</p> <p>All documentation generated will be will be issued in both Welsh and English</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. PHW will ensure it has staff with the appropriate bilingual skills and specialist knowledge in each service through use of the Welsh Language skills assessment tool.</p>		<p>The Scheme will be translated in to Welsh and made available all to access</p>

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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	There is evidence to suggest that the scheme has greater take up in those employed in higher pay bands Breakdown by Pay Band: <table border="1" data-bbox="741 620 1115 828"> <tr> <td>Bands 2-4</td> <td>4</td> </tr> <tr> <td>Bands 5-7</td> <td>17</td> </tr> <tr> <td>Band 8a & above</td> <td>21</td> </tr> <tr> <td>M&D</td> <td>7</td> </tr> </table>	Bands 2-4	4	Bands 5-7	17	Band 8a & above	21	M&D	7	The Scheme has been revised, removing the 18 month limit on retire and returns and also the factors for consideration when someone wishes to retire and return permanently.	The revised Scheme means that it is now intended that most applications for Retire and Return will be considered with positive intent if they meet the organisation and individual needs. New Retire and Return requests will routinely be granted on a permanent basis (unless the work is a time limited project which would dictate the need for a Fixed Term Contract).
Bands 2-4	4										
Bands 5-7	17										
Band 8a & above	21										
M&D	7										
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 scheme will be monitored and updated in line with good practice and other changes as required								
6.12 Consider any other groups and risk factors relevant to this strategy,	No other groups identified.										

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 / Division. Make reference to where the mitigation is included in the document, as appropriate
policy, plan, procedure and/or service			The scheme will be monitored and updated in line with good practice and other changes as required

7. 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 Directorate / Division 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>No differential impact</p>		<p>The scheme will be monitored and updated in line with good practice and other changes as required</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, reducing the harm caused</p>	<p>No differential impact</p>		<p>The scheme 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 and any particular groups affected	Recommendations for improvement/mitigation	Action taken by Directorate / Division Make reference to where the mitigation is included in the document, as appropriate
<p>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>No differential impact</p>		<p>The scheme 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 and any particular groups affected	Recommendations for improvement/mitigation	Action taken by Directorate / Division 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>	No differential impact		The scheme will be monitored and updated in line with good practice and other changes as required

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 Directorate / Division 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>	<p>The policy is intended to improve the health and wellbeing of employees later in life and provide greater opportunities for balancing family and work needs. The policy is intended to have a positive difference to staff to allow them to work flexibly post retirement. The Retire and Return is intended to improve work life balance for staff who may have dependents, family commitments and caring needs. The Scheme may allow staff to continue to work longer and enjoy a good work life balance.</p>		
<p>7.6 People in terms of macro-economic, environmental and sustainability factors: Consider the impact of government policies; gross domestic product; economic</p>	<p>No differential impact identified.</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 Directorate / Division Make reference to where the mitigation is included in the document, as appropriate
development; biological diversity; climate 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 Retire and Return Scheme applies to all, the new scheme will extend flexible working arrangements post retirement in most cases to permanent arrangements allowing those of retirement age greater flexibility. We will retain organisational knowledge, skills and experience of staff who have worked in the organisation in some instances for many years.</p> <p>It will provide opportunities for staff to earn more money in a period of considerable financial upheaval/cost of living crisis.</p> <p>Additionally, the Scheme provides that all requests shall be considered with positive intent and that it is expected most arrangements will be granted on a permanent basis, unless projects are time limited or an employee wishes to return until a fixed future date. Therefore the Scheme allows greater scope and flexibility to all staff who can benefit from flexible retirement.</p>
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Action Plan for Mitigation / Improvement and Implementation

	Action	Lead	Timescale	Action taken by Directorate / Division
8.2 What are the key actions identified as a result of completing the EHIA?	Apply the scheme fairly and consistently.	Managers and People & OD	Ongoing	
	Provide support and guidance to managers and staff.	People & OD	Ongoing	
8.3 Is a more comprehensive Equalities Impact Assessment or Health Impact Assessment required? 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?	No.			

	Action	Lead	Timescale	Action taken by Directorate / Division
<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>Scheme to continue for approval.</p>			

