



Equality Impact Assessment Template

Before carrying out EqIA, you should familiarise yourself with the University's EqIA Policy Statement and Guidance and Checklist Notes, and undertake our online training on Equality and Diversity and EqIA. These, along with further information and resources, are available at www.ed.ac.uk/schools-departments/equality-diversity/impact-assessment

EqIA covers policies, provisions, criteria, functions, practices and activities, including decisions and the delivery of services, but will be referred to as 'policy/practice' hereinafter.

A. Policy/Practice (name or brief description): Flexible Retirement Policy
B. Reason for Equality Impact Assessment (Mark yes against the applicable reason): <ul style="list-style-type: none">• Proposed new policy/practice• Proposed change to an existing policy/practice yes• Undertaking a review of an existing policy/practice yes• Other (please state):
C. Person responsible for the policy area or practice: Name: Elsbeth Wedgwood Job title: Senior HR Partner, Employment Policy School/service/unit: HR
D. An Impact Assessment should be carried out if any of the following apply to the policy/practice, if it: <ul style="list-style-type: none">• affects primary or high level functions of the University• is relevant to the promotion of equality (in terms of the Public Sector Equality Duty 'needs' as set out in the Policy and Guidance)? yes• It is one which interested parties could reasonably expect the University to have carried out an EqIA? yes
E. Equality Groups To which equality groups is the policy/practice relevant and why? (add notes against the following applicable equality group/s) <ul style="list-style-type: none">• Age• Disability• race (including ethnicity and nationality)• religion or belief• sex• sexual orientation• gender reassignment

- pregnancy and maternity
- marriage or civil partnership¹

Policy applies to employees aged 55 plus therefore age will be main group affected although other characteristics must be considered when reviewing applications to ensure fairness is applied.

Add notes against the following applicable statements:

- On any available information about the needs of relevant equality groups:
- Any gaps in evidence/insufficient information to properly assess the policy, and how this be will be addressed:
- If application of this policy/practice leads to discrimination (direct or indirect), harassment, victimisation, less favourable treatment for particular equality groups:
- If the policy/practice contributes to advancing equality of opportunity²
- If there is an opportunity in applying this policy/practice to foster good relations:
- If the policy/practice create any barriers for any other groups?
- How the communication of the policy/practice is made accessible to all groups, if relevant?
- How equality groups or communities are involved in the development, review and/or monitoring of the policy or practice?
- Any potential or actual impact of applying the policy or practice, with regard to the need to eliminate discrimination, advance equality and promote good relations:

This policy applies to all employees aged over 55 who have relevant membership of certain pension schemes. It contributes to advancing equality of opportunity as it allows employees to request a reduction in hours and change to their working pattern.

The confirmation of fair reasons to turn down a request and introduction of an appeal stage should ensure that the policy is applied consistently and should encourage good relations by being a transparent process.

We have not identified any negative impacts on equality in the application of the policy.

The revised policy will be published on the University HR website and will ensure information about changes to the policy are cascaded via local areas.

F. Equality Impact Assessment Outcome

¹ Note: only the duty to eliminate discrimination applies to marriage and civil partnership. There is no need to have regard to advancing equality or opportunity or fostering good relations in this respect.

² This question does not apply to the protected characteristic of marriage or civil partnership

Select one of the four options below to indicate how the development/review of the policy/practice will be progressed and state the rationale for the decision

Option 1: No change required – the assessment is that the policy/practice is/will be robust.

Option 2: Adjust the policy or practice – this involves taking steps to remove any barriers, to better advance equality and/or to foster good relations.

Option 3: Continue the policy or practice despite the potential for adverse impact, and which can be mitigated/or justified

Option 4: Stop the policy or practice as there are adverse effects cannot be prevented/mitigated/or justified.

G. Action and Monitoring

1. Specify the actions required for implementing findings of this EqIA and how the policy or practice will be monitored in relation to its equality impact (or note where this is specified above).

With new HR system we will be able to keep better records of flexible retirement requests and can monitor reasons any requests are not agreed. The system is expected to be introduced in 2020

The system will capture number of applications so we can review how many applications are made.

We will monitor number of appeals made and reasons for requests being turned down to ensure reasons comply with policy and legislation and highlight any equality concerns.

We will also monitor any complaints/feedback about the policy and its application. This will include feedback obtained from the trade unions at monthly meetings.

2. When will the policy/practice next be reviewed?
2022

H. Publication of EqIA

Can this EqIA be published in full, now? **Yes**

If No – please specify when it may be published or indicate restrictions that apply:

I. Sign-off

EqIA undertaken by (name(s) and job title(s)): Elspeth Wedgwood Snr HR Partner/ Suzanne McKenzie Snr HR Partner
Caroline Wallace, Senior Partner, Equality, Diversity and Inclusion

Accepted by (name): Linda Criggie, Deputy Director of HR

Date: June 2019

Retain a copy of this form for your own records and send a copy to equalitydiversity@ed.ac.uk