



Pay Progression Procedure Policy



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Amendment Form

Please record brief details of the changes made alongside the next version number. If the procedural document has been reviewed **without change**, this information will still need to be recorded although the version number will remain the same.

Version	Date Issued	Brief Summary of Changes	Author
Version 1	March 2022	This is a new Trust policy, please read in full.	Ashish Kaushik, Senior People Business Partner

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1 INTRODUCTION

National changes to Agenda for Change (AfC) were agreed by the NHS Staff Council in June 2018 clarifying arrangements for employees progressing through pay bands (pay progression). The 2018 framework agreement on the reform of AfC subsequently introduced provisions to move to a new pay system with faster progression to the top of pay bands through fewer pay step points underpinned by mandatory local appraisal policies and procedures.

The arrangements were introduced to ensure that in a patient centred health care system, staff are supported to develop and utilise the skills and behaviours required in a modern NHS organisation.

This procedure sets out the basis upon which an individual's performance drives pay progression. Pay progression should not be seen as an automatic right by employees but rather is something to be earned and is a reward that is dependent on satisfactory performance, conduct and demonstration of meeting all statutory and mandatory training requirements relevant to their role. Pay progression is no longer automatic on an annual basis under the new system. This policy is underpinned by the principals detailed within Annex 23 of the Agenda for Change Terms and Conditions.

Any amendments to the NHS terms and conditions service handbook will supersede this policy as pay arrangements are agreed. This procedure will be updated to reflect any changes.

2 PURPOSE

The intention of this policy is to assist employees and managers to understand the requirements needed to progress through the relevant pay scale following the 2018 Agenda for Change Pay Award.

This procedure applies to all Doncaster and Bassetlaw Teaching Hospitals NHS Foundation Trust (the "Trust") employees employed under Agenda for Change terms and conditions of service and describes the approach to pay progression.

This policy sets out the basis upon which an individual's performance drives pay progression. It is expected that employees who meet the required standards at their pay-step date will progress to their next pay-step point.

3 SCOPE

This policy applies to all employees on AfC terms and conditions of employment (including those on permanent and temporary contracts) who joined the organisation on or after 1st April 2019, or who are promoted to a higher band on or after 1st April 2019.

The Trust will ascertain a fair and consistent approach to applying the Pay Progression Policy and will give due consideration to employee's individual circumstances when considering a request for pay progression.

In the event of an infection outbreak, flu pandemic or major incident, the Trust recognises that all possible action must be taken to maintain ongoing patient and staff safety. In such circumstances it may not be possible to adhere to all expected standards as detailed within paragraph 5.1 (below). Where this is the case and providing the employee is not subject to a formal capability process or live disciplinary warning then with Executive approval, the pay step should not be delayed.

4 DUTIES AND RESPONSIBILITIES

4.1 The Trust Executive Team and Senior Leadership Teams are responsible for:

- Setting and communicating organisational objectives, competencies and standards.
- Ensuring all staff receive regular supervision / 1:1s from line managers and arrangements are made during times of line managers' absences.
- Ensuring that line managers have the requisite skills and expertise to appraise staff fairly and equitably, in accordance with DBTH equality and diversity standards.
- Ensuring appropriate training is provided to line managers to complete meaningful Performance Appraisals and be able to record appraisals and pay step outcomes on ESR.
- Providing sufficient levels of Statutory and Mandatory Training to meet demand.
- Ensuring the policy is applied in a consistent and equitable manner.
- Reviewing the application of this policy.

4.2 Line Managers

It is the responsibility of the line manager to:

- Have discussed with the employee their pay affecting step date and have scheduled a pay affecting progression meeting to meet the timescales required.
- Undertake annual appraisals for all members of their team, including an objective assessment/review of an employee's performance in accordance with the Trust's Appraisal Policy (CORP/EMP 32). This may be based on feedback, worked examples, previous informal/ formal discussions, the employee's achievement of any personal or organisational objectives, and their lived values and behaviours.
- Identify performance that falls below the accepted levels and ensure this is managed effectively in line with the Trust's Capability Procedure: Managing Poor Performance (CORP/EMP 25). Ensure staff are supported to achieve required performance through an individual personal development plan (PDP).
- If the pay step date is different to the appraisal date the manager must conduct a Pay Progression Review and complete the Review Form at Appendix 1 to record the discussions. If the pay step is deferred this must be confirmed in writing to the employee as detailed in 5.2 (below).
- Ensure that both they and staff understand what evidence is required to demonstrate the required standards for pay progression.
- Notify payroll on a timely basis when a pay step rise has been agreed or declined.
- Approve or decline pay affecting progression on the receipt of a completed Pay Progression Review Form (Appendix 1), evidencing compliance with the criteria in section 5.1 (below).
- Discuss pay progression with the employee prior to any deferment of pay and the rationale for deferment.
- Ensure the employee is aware of their right to a review where the decision has been made not to apply the pay step.
- Ensure that if absence or other circumstances delay or prevent the completion of a pay step review, this is escalated to a senior manager in a timely manner to ensure that appropriate contingency measures can be implemented.
- Ensure the employee is encouraged and given the opportunity to undertake statutory and mandatory training within work time or given appropriate time back in lieu where required.

- Record the Pay Progression Review Meeting on ESR Manager Self Service at least one month prior to the pay step date to confirm pay progression has been agreed or declined.

4.3 Employees

It is the responsibility of each employee to:

- Be aware of their pay step date. Participate in a pay step review meeting where this is different to the date of the appraisal.
- Be responsible for demonstrating that they have met the required standards for pay progression.
- Have achieved a satisfactory level of conduct in the previous 12 months prior to their pay step date.
- Take personal responsibility for proactively maintaining expected levels of performance and notify the line manager of any issues which may impact on continued performance.
- Maintain 100% compliance with their statutory and mandatory training requirements. Make their line manager aware of any organisational constraints that are preventing them from being compliant in statutory and mandatory training.
- Ensure appraisals for staff they manage are completed.
- Engage with an annual appraisal each year, regardless of whether or not a pay-step is due, and to jointly agree personal and organisational objectives with their line manager. Take ownership and responsibility to work towards their agreed objectives.
- Attain and maintain continued professional development, academic and practical based qualifications and where necessary undertake such supervision as is relevant to their role, i.e. clinical/managerial supervision, as required in order to perform their duties as identified in their job description.
- Take all reasonable steps possible to ensure personal health, safety and wellbeing.
- Identify any training needs required to meet the job role.

4.4 People and Organisational Development

It is the responsibility of People and Organisational Development to:

- Advise Line Managers and supervisors on the application of this policy and the linkages to the [Capability Procedure: Managing Poor Performance \(CORP/EMP 25\)](#) and the [Disciplinary Procedure \(CORP/EMP 2\)](#) as appropriate.
- Advise Line Managers and supervisors on the application of this policy and the links to Agenda for Change Terms and Conditions.
- Assist in the identification of relevant training and development opportunities.
- Assist with the development of personal development plans (PDP).
- Assist managers in utilising the tools available within other policies and procedures to support employees at work in accordance with good practice and any associated employment legislation.
- Provide advice and support on all aspects of this policy to ensure consistent application.

5 PROCEDURE

5.1 Standards required for pay progression

Pay progression for all pay points will be conditional upon individuals demonstrating that they have the requisite knowledge, skills and competencies for their role and that they have demonstrated the required level of performance and delivery.

In the period in which a pay step point does not lead to an increase in pay, ongoing regular appraisal discussions and appraisal should still take place.

Employees will progress to the next pay step point on their pay step date where the following can be demonstrated:

- The appraisal has been completed within the last 12 months and outcomes are in line with the Organisational standards.
- There is no formal capability* process in place.
- There is no live disciplinary sanction on record.
- Statutory and Mandatory Training is 100% complete.
- **For Line Managers only** – appraisals have been completed for all staff they manage.

*capability – means that the employee has not been placed on formal performance monitoring as per the Capability Procedure: Managing Poor Performance (CORP/EMP 25).

Where factors beyond the employees' control have prevented compliance with any of the requirements detailed above such as a pandemic, organisational or operational issues or training being cancelled, this should not prevent them from progressing. Employees should bring such factors to the attention of their line manager as soon as possible (not waiting until the pay-step review) so that these can be addressed and remedied. Managers should also raise any potential for organisational factors which may affect pay progression as soon as reasonably practicable.

Step 1

Pay-step points that lead to an increase in pay will not be automatic on the payroll system (ESR). Employees will receive a notification from ESR four months and then one month prior to the Pay Step Date.

Line Managers will receive an ESR notification that will detail the pay step dates of their direct reports which are due within the next 90 days.

Upon receiving the ESR notification, a Manager must meet with the individual to undertake a Pay Step Submission Review (Appendix 1). This meeting will determine whether the employee can progress through the next Pay Step and should draw on the most recent appraisal.

Step 2

At least 1 month before the Pay Step Date and once Step 1 has been completed, the manager should enter, under "Pay Progression Meeting Review" on ESR, the outcome of the meeting. If the individual can progress to the next pay step, this will be actioned on ESR.

Step 3

If the Standards have not been met, this should be entered onto ESR. The Line Manager should discuss and agree a plan with the employee for any remedial action needed, including timescales.

Proper planning and prioritisation are essential to ensure that there is no unnecessary delay in carrying out the Pay Progression Meeting Review as pay progression will not normally be backdated.

On successful completion, the manager will apply the Pay Step following the deferral, by adding a new "Pay Progression Meeting Review" and select 'Yes, following deferral'.

If a Line Manager is considering not approving the Pay Step, they must speak with the relevant People Business Partner team before the discussion with the employee and before the outcome is actioned on ESR. It is expected the large majority of employees will be approved for their Pay Step and only where formal action has already been taken in relation to capability/performance, may this defer a Pay Step.

Although staff must have successfully completed their last appraisal to move to their next pay step point, the date the appraisal takes place does not have to be linked to their pay step date.

5.2 Failure to meet the standards to progress

Employees will not be eligible for pay-step progression if they fail to meet the standards as defined in section 5.1.

It is expected that employees will achieve the required standards at the point of their pay-step date. It is also expected that the employee and their line manager should be aware of any problems in reaching the required standards before the pay-step date. This will allow time for issues to be raised and possible solutions found.

The deferment of pay-step progression linked to conduct, or capability can only take place if the conduct/capability issues are being formally managed in accordance with Trust Policy.

In situations where standards have not been met as per section 5.1, and there are no mitigating factors sufficient to justify this, it is expected that an individual's pay-step will be delayed, subject to arrangements detailed below.

If the decision is taken to defer pay-step progression, the Line Manager will need to update ESR to delay the pay step point which also includes the reasons for the deferment. The Line Manager is also responsible for confirming this in writing to the employee clearly detailing why the pay-step point has not been agreed (see Appendix 2). The line manager should also discuss and agree a plan with the staff member for any remedial action needed to ensure that the required standards are met, including a timescale, and how any training and support needs will be met. The staff member must take all necessary steps to meet the requirements as soon as possible and the line manager must provide the necessary support.

A further pay-step review meeting should be arranged at an agreed date to review progress and, where satisfactory, initiate the opening of the pay-step. The staff member should progress to the next pay-step effective from the date that the relevant requirements have been met. Their pay step-date for future years will remain unchanged in essence the pay step is delayed for the year in which they did not demonstrate compliance with the standards (e.g. pay step was 22 July and was delayed until 1 October, but for the following year the pay step date is the 22 July).

The manager will advise the employee of their right to seek a review of any decision to delay the pay step (see 5.6 below). The review will be to the next most senior manager and the review should be held within one month of the request being made. If the review is upheld, the pay step should be applied backdated to the pay-step date.

5.3 Pay Step delayed due to a live Disciplinary sanction/outcome

Where a pay-step is delayed due to a live disciplinary sanction, the line manager should initiate a pay-step review meeting before the expiry of the sanction. This should be used to confirm that all other requirements have been met and to ensure that the employee progresses to the next pay-step, effective the day after the sanction expires. All future pay-step dates will remain unchanged.

A disciplinary sanction cannot be applied retrospectively to delay a pay-step if it comes into effect after the pay-step date.

If a disciplinary sanction in place at the time of the pay step date is subsequently repealed, for example as a result of a successful appeal, the pay step will be backdated to the pay step date if all other standards have been met.

5.4 Employees absent from work when their pay step is due

If an employee is absent from work for authorised reasons when a pay-step is due, the principle of equal and fair treatment should be followed so that no detriment is suffered due to the authorised absence.

In the case of planned long-term paid absence such as maternity, adoption and shared parental leave the pay-step review can be conducted early if appropriate, allowing the pay-step to be applied on their pay-step date in their absence. If the review cannot be conducted prior to the pay step date, the pay step date should be applied by the manager in the employee's absence.

If an individual is on long-term paid absence and a pay-step review cannot be conducted prior to the pay-step date, the pay-step point should be applied in the individual's absence.

If there was a live disciplinary sanction/outcome in place at the point the individual went on leave, the pay-step point should be applied in their absence if appropriate, effective the day after the sanction expires.

If there was an active formal capability process underway at the point they went on leave, the pay-step point can be delayed. The improvement process should be resumed immediately upon their return. On satisfactory completion, the pay-step point will be implemented. All future pay-step dates will remain unchanged.

In the event of suspension from work on full pay – for example in the event of an investigation undertaken in accordance with the Trust's Disciplinary Procedure – the pay-step review should be completed based on performance up to the point of suspension in order to ensure that suspension remains a neutral act.

5.5 Re-earnable process for Bands 8c, 8d and 9

The principles and standards for pay progression and then re-earnable pay for staff in bands 8c, 8d and 9 are the same as the principles and standards for all other staff.

Once they have reached the top of their band, the expectation is that all staff will meet the required standards and will re-earn the relevant element of pay annually. The first point at which the re-earnable element becomes relevant is 12 months after employees have passed through their pay step point to reach the top of the band.

In the year after an employee has reached the top of bands 8c, 8d or 9, 5% or 10% of basic salary will become re-earnable. Where the standards in paragraph 5.1 are met, salary is retained at the top of the band. If standards are not met salary may be reduced by 5% or 10% from the pay step date, subject to the provisions in paragraph 5.1.

The employee will be able to restore their salary to the top of the band at the end of the following year by meeting the required standards.

The employee has the right to request a review of the decision to reduce their pay. This request should be made via the process detailed in paragraph 5.6 (below).

Staff on the top two points of these bands on 31 March 2013 have reserved rights to the relevant point. This reserved right will be retained on a marked time basis. At the end of 2020/21, 5% of pay will become annually earned and then, when annual increases to the top of the band add a further 5%, annually earned pay will apply to 10% of basic pay.

5.6 Review the decision to delay pay step

The employees have the right to request a review of the decision to delay the pay step and in the case of band 8c, 8d and band 9 reduce their pay. This request should be made in writing to the next most senior manager detailing the grounds on which the review is required. A review of the original decision should be undertaken within one month of the request being made. If the review is upheld, the pay step should be applied backdated to the pay-step date.

6 THE BRIBERY ACT 2010

The Bribery Act 2010 The Trust has a responsibility to ensure that all staff are made aware of their duties and responsibilities arising from The Bribery Act 2010. The Bribery Act 2010 makes it a criminal offence to bribe or be bribed by another person by offering or requesting a financial or other advantage as a reward or incentive to perform a relevant function or activity improperly performed. The penalties for any breaches of the Act are potentially severe. There is no upper limit on the level of fines that can be imposed and an individual convicted of an offence can face a prison sentence of up to 10 years. For further information

see The Bribery Act 2010 - Quick start guide (justice.gov.uk) If you require assistance in determining the implications of the Bribery Act please contact the Local Counter Fraud Specialist. Due consideration has been given to the Bribery Act 2010 in the development of this policy document and consistent application and monitoring of this policy will mitigate bribery in relation to pay progression.

7 TRAINING/SUPPORT

The People Business Partnering and Workforce Information teams will provide ongoing training sessions for both line managers and employees in relation to Pay Progression, the roles and responsibilities and the necessary processes for implementation. Additionally, user guides and video tutorials will be made available via the Trust's intranet to demonstrate how to utilise Manager Self Service and Portlets when confirming Pay Steps.

8 MONITORING COMPLIANCE WITH THE PROCEDURAL DOCUMENT

What is being Monitored	Who will carry out the Monitoring	How often	How Reviewed/ Where Reported to
Suitability of Policy	Deputy Director of P&OD	At least every 3 years, or sooner if there are changes to national terms and conditions	Monitor best practice and changes to national terms and conditions
Effectiveness of the arrangements	Deputy Director of P&OD, in partnership with staff-side	Annually	Monitoring information should be analysed and used to review and revise policies and procedures to ensure continuing effectiveness.
Non-compliance of policy by Divisions and Directorates	People & Organisational Development	On-going	Issues to be reported to respective Division and Directorate management teams.

9 DEFINITIONS

Appraisal - Appraisal is the opportunity for individual members of staff and their line managers, to have a discussion about their performance and development and the support they need in their role. It should both assess recent performance and focus on future objectives, opportunities and resources needed.

Pay progression – movement of an employee’s salary through the Agenda for Change pay scale.

Pay step – date at which the employee is eligible to move to the new point on the pay scale (previously referred to as Increment).

Re-earnable pay – salary points in Bands 8c, 8d and 9 which will be retained with satisfactory performance (an appraisal rating of Met Expectations or Exceeds Expectations) or reduced if performance is not satisfactory.

Promotion – Moving to a higher banded role.

9 EQUALITY IMPACT ASSESSMENT

The Trust aims to design and implement services, policies and measures that meet the diverse needs of our service, population and workforce, ensuring that none are disadvantaged over others. Our objectives and responsibilities relating to equality and diversity are outlined within our equality schemes. When considering the needs and assessing the impact of a procedural document any discriminatory factors must be identified.

An Equality Impact Assessment (EIA) has been conducted on this procedural document in line with the principles of the Equality Analysis Policy (CORP/EMP 27) and the Fair Treatment for All Policy (CORP/EMP 4).

The purpose of the EIA is to minimise and if possible remove any disproportionate impact on employees on the grounds of race, sex, disability, age, sexual orientation or religious belief. No detriment was identified. (See Appendix 2).

10 ASSOCIATED TRUST PROCEDURAL DOCUMENTS

[Disciplinary Procedure – CORP/EMP 2](#)

[Statutory and Essential Training \(SET\) Policy – CORP/EMP 29](#)

[Appraisal Policy – CORP/EMP 32](#)

[Capability Procedure: Managing Poor Performance – CORP/EMP 25](#)

[Fraud, Bribery and Corruption Policy and Response Plan – CORP/FIN 1\(D\)](#)

[Standards of Business Conduct and Employees Declarations of Interest Policy – CORP/FIN 4](#)

11 DATA PROTECTION

Any personal data processing associated with this policy will be carried out under ‘Current data protection legislation’ as in the Data Protection Act 2018 and the General Data Protection Regulation (GDPR) 2016).

For further information on data processing carried out by the trust, please refer to our Privacy Notices and other information which you can find on the trust website:

<https://www.dbth.nhs.uk/about-us/our-publications/uk-data-protection-legislation-eu-general-data-protection-regulation-gdpr/>

12 REFERENCES

Agenda for Change: Terms and Conditions of Service Handbook

APPENDIX 1 – PAY PROGRESSION REVIEW FORM

Employee Name:	
Employee Role:	
Manager Name:	
Date of Pay Step review:	
Date Pay Step due:	
Date of last appraisal:	

Summary of pay progression review meeting

Employee's summary:
Manager's summary:

No.	Standards for progression	Yes	No
1	Has the appraisal process been completed within the last 12 months and outcomes are in line with the organisation's standards?		
2	Is there a formal capability process in place?		
3	Is there a formal disciplinary sanction live on the employees record?		
4	Has statutory and/or mandatory training been completed?		
5	For line managers only – have appraisals been completed for all their direct reports as required?		

Assessment of Standards			
	Approved	Deferred	Declined
Is the pay step approved, deferred or declined			
Reasons for this decision			

Employee action plan and timescales

Manager and employee to agree an action plan and timescales if the employee does not meet the required standards.

Employee Signature		Date:	
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Manager Signature		Date:	
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APPENDIX 2 – DEFERMENT OF PAY PROGRESSION



**Doncaster and Bassetlaw
Teaching Hospitals**
NHS Foundation Trust

Ref:

Doncaster Royal Infirmary
Armthorpe Road, Doncaster,
South Yorkshire DN2 5LT

DATE

PRIVATE & CONFIDENTIAL

NAME

Tel: 01302 366666

ADDRESS

Fax: 01302 320098

www.dbth.nhs.uk

Dear

Re: Compliance with Pay Progression Standards

I refer to our Pay Step meeting held on **Date**, where we discussed the required standards for pay progression which are now applicable to all DBTH NHS FT staff on Agenda for Change Terms and Conditions. I remind you of the standards required below:

1. The appraisal has been completed within the last 12 months and outcomes are in line with the Organisational standards
2. There is no formal capability process in place
3. There is no live disciplinary sanction on record
4. Statutory and Mandatory Training is 100% complete
5. **For Line Managers** only – appraisals have been completed for all staff they manage.

A copy of the DBTH Pay Progression Policy **is enclosed for your information / has previously been provided to you (DELETE AS APPROPRIATE).**

During our meeting I confirmed that your next pay step date is **Date** and that this would be pay affecting. This means that your pay is due to increase from **£XXX** to **£XXX** with effect from this date.

I advised you that that due to **(insert reason for deferral – must be in line with the standards set out above)**, your pay step point will be deferred. A further pay step review meeting will be arranged to

assess whether you meet the standards set out above and where satisfactory, initiate the opening of your pay step. Your pay step date for future years will remain unchanged.

Please find attached a copy of the completed Pay Progression Review form.

The action plan which we discussed and agreed is outlined below

Objective / Time Scale

- Objective 1
- Objective 2

As discussed, below is a list of agreed support / training:

- Support 1
- Support 2

You have the right to appeal against this decision. Full details of the appeals process can be found in section 5.2 of the Pay Progression Policy.

If you wish to discuss the contents of this letter further, experience any difficulties or need help and advice, please do not hesitate to contact me.

Yours sincerely

Manager Name
Manager Job Title

cc: HR Case Management
Personal File

APPENDIX 3 - EQUALITY IMPACT ASSESSMENT PART 1 INITIAL SCREENING

Service/Function/Policy/Project /Strategy	Division	Assessor (s)	New or Existing Service or Policy?	Date of Assessment
Pay Progression Policy CORP/EMP 56 v 1	People and Organisational Development	Ashish Kaushik	New Policy	01/03/2022
1) Who is responsible for this policy? Name of Division/Directorate: People and Organisational Development				
2) Describe the purpose of the service / function / policy / project/ strategy? Who is it intended to benefit? What are the intended outcomes? To provide clarity on the processes and procedures when implementing Pay Progression in accordance with Annex 23 of the Agenda for Change Terms and Conditions				
3) Are there any associated objectives? Legislation, targets national expectation, standards: To provide consistent application of the policy across the Trust				
4) What factors contribute or detract from achieving intended outcomes? – Staff may be unaware of their roles and responsibilities				
5) Does the policy have an impact in terms of age, race, disability, gender, gender reassignment, sexual orientation, marriage/civil partnership, maternity/pregnancy and religion/belief? Details: [see Equality Impact Assessment Guidance] - No				
<ul style="list-style-type: none"> If yes, please describe current or planned activities to address the impact [e.g. Monitoring, consultation] – 				
6) Is there any scope for new measures which would promote equality? No				
7) Are any of the following groups adversely affected by the policy?				
Protected Characteristics	Affected?	Impact		
a) Age	No			
b) Disability	No			
c) Gender	No			
d) Gender Reassignment	No			
e) Marriage/Civil Partnership	No			
f) Maternity/Pregnancy	No			
g) Race	No			
h) Religion/Belief	No			
i) Sexual Orientation	No			
8) Provide the Equality Rating of the service / function / policy / project / strategy – tick (✓) outcome box				
Outcome 1 ✓	Outcome 2	Outcome 3	Outcome 4	
<i>*If you have rated the policy as having an outcome of 2, 3 or 4, it is necessary to carry out a detailed assessment and complete a Detailed Equality Analysis form – see CORP/EMP 27.</i>				
Date for next review:	March 2025			
Checked by:	Anthony Jones		Date:	1 April 2022