



Doncaster and Bassetlaw
Teaching Hospitals
NHS Foundation Trust

Pension's Contribution Alternative Reward Policy (Annual Allowance)

This procedural document supersedes: CORP/EMP 53 v 3 – Pension's contribution Alternative Reward Policy. (Annual Allowance)



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Executive Sponsor(s):	Zoe Lintin, Chief People Officer
Author/reviewer: (this version)	Anthony Jones, Deputy Director of People and Organisational Development
Date written/revised:	April 2026
Approved by:	Policy Formulation Group
Date of approval:	27 May 2026
Date issued:	July 2026
Next review date:	November 2028 (Policy Valid Until April 2029)
Target audience:	Trust-wide

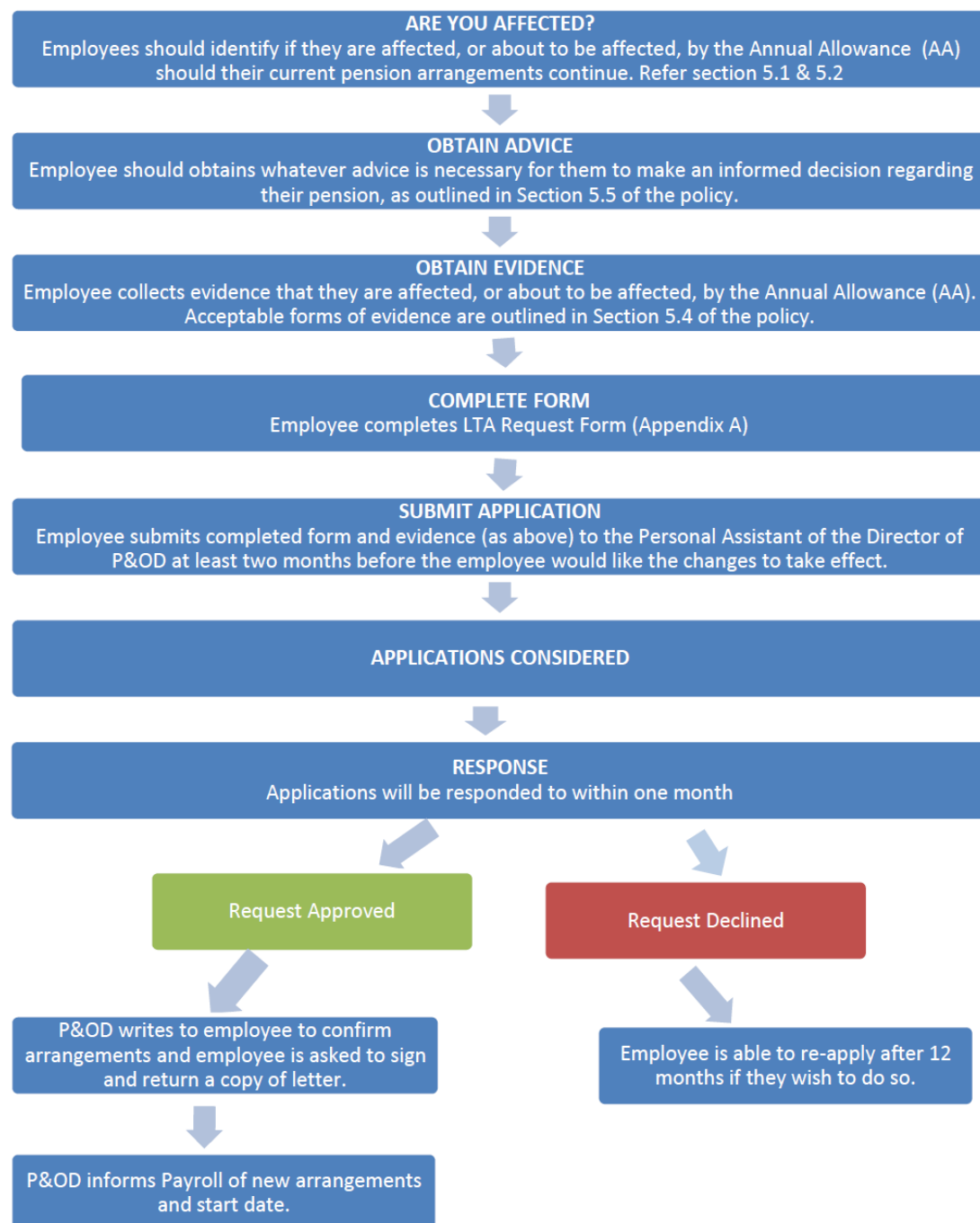
Amendment Form

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 3	January 2010	- References updated - Appendix 1 updated and re-designed	A N Other
Version 2	May 2023	Minor amends to wording of introduction Removal of the ability to make retrospective applications backdated to September 2020 Addition of an eligibility criteria section at section 4 of the policy Removal of references to the Lifetime Allowance and associated section of the policy. Increase to the value of the Annual Allowance Amendment of the application form to reflect the above 2 changes Replacement of Her Majesties Custom and Revenue with His Majesties Custom and Revenue	A Jones
Version 1	October 2021	This is a new procedural document, please read in full.	K Barnard

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Pension Contribution Alternative Award Policy**Application Process for Separate Cash Payment**

1 INTRODUCTION

This policy outlines an option for people who are current active members of the NHS Pension Scheme (the NHS Scheme) who, may become affected by the Annual Allowances (AA) in respect of their pension savings in registered pension schemes in the UK. For most people, it will likely be in their best financial interests to remain in the NHS Pension Scheme. This policy is only applicable for those people affected by the annual tax issues and sets out one option for these individuals. This may not be the best financial option for those affected and so individuals should consider this policy and any associated information carefully before making a decision. Individuals are strongly encouraged to obtain their own financial advice before considering any changes.

This policy has been introduced to support the risk to operational delivery that has been identified as a result of the pension tax regulations and takes account of the recent government legislative changes introduced on 06 April 2023. This scheme is intended to address operational challenges and is not intended to act as an inducement to people to withdraw from the NHS Pension scheme. Other options for addressing this issue may be available.

This policy does not form part of an individual's contract of employment, and the Trust may amend or remove it at its sole and absolute discretion. This policy is open to all eligible people - irrespective of whether they have previously opted out of the NHS Pension Scheme. However, first time applicants under this policy must currently be a member of an NHS Pension Scheme and have been for a minimum of 6 months.

2 PURPOSE

To provide an optional alternative to pension contribution for those individuals who can demonstrate that they are impacted by the pension tax thresholds and have decided to opt out of the pension scheme.

3 DUTIES AND RESPONSIBILITIES

3.1 People of the Trust

The Trust recognises that, as a direct consequence of membership of one of the NHS Pension Schemes, some people may build up pension savings that exceed the annual allowance in a given tax year and a tax charge is due on the value of the excess benefits. As a consequence, individuals may wish to discontinue pension contributions and request a Pension Restructuring Payment in lieu of employer's pension contributions.

People:

- First time applicants under the policy must be a current member of an NHS Pension Scheme to which the Trust is making a contribution when the application is made and have been so for a minimum of 6 months

- maintain, at the date of application, current working sessions/hours (the purpose of this scheme is to support sustainability and service delivery in the Trust and avoid the loss or reduction of vital expertise)
- must provide written evidence that the threshold has been reached or exceeded or will be reached or exceeded within the next two financial years
- must opt-out of the NHS Pension Schemes and not be in receipt of pension benefits after the application is approved (i.e. must become a Deferred Member)
- must inform the Trust if they transfer their benefits out of the NHS Pension Schemes and/or draw pension benefits from them.

3.2 People Systems and Workforce Information Team

- must confirm that written evidence demonstrates that the value of the employee's savings in the NHS Pension Schemes has exceeded or is expected to exceed the AA
- must confirm that the Trust was making an employer's contribution to an NHS Pension Scheme
- when approved, arrange payment of the Pension Restructuring Payment to the employee
- will undertake an annual review of every Pension Restructuring Payment on the anniversary of commencement
- Will ensure colleagues wishing to opt out have completed and signed the SD502 opt out form

3.1 People and Organisation Development & Finance Departments

The Deputy Director of People and Organisational Development in conjunction with the Director of Finance will approve payment of a Pension Restructuring Payment on receipt of confirmation from the People Systems Payroll Liaison Manager that pension savings conditions have been met, and all other criteria are satisfied.

4 ELIGIBILITY

The pension recycling scheme is open to any employee of the Trust likely to be adversely impacted by the annual allowance and the consequent tax implications. It is not within the gift of the Trust to identify individuals who may be affected. The tax position of individuals can be impacted on by earnings outside of their main NHS employment and may take the individual over the adjusted income limit of £260,00 (as at April 2026) In addition, also include an annual allowance of £60,000.

The scheme is open to substantive colleagues only. Applicants for this scheme must opt-out of the NHS Pension scheme and not be in receipt of pension benefits after the application is made. Payments will only be processed and actioned once a completed pension opt out form has been received.

5 PROCEDURE

Refer to flow chart at the beginning of the policy for the steps required.

5.1 Annual Allowance

While there are no limits on the amount of pension savings an individual may make each tax year, the AA is the maximum amount of saving that you can make in a registered pension scheme(s) each tax year without incurring a tax charge.

The AA is £60,000 Any pension savings in excess of this will be subject to an annual allowance tax charge. The government may change these limits in the future. Different annual allowance limits may apply to any separate defined contribution pension savings you may have.

From April 2016, the annual allowance for “high income individuals” tapered from £40,000 to £10,000 depending on the individual’s level of income. Those affected since 6 April 2020 are those with income (less pension contributions) from all sources over £200,000 and income including pension contributions of over £240,000 (increased to £260,000 from 06 April 2023). If an individual is subject to a tapered annual allowance, their annual allowance of £60,000 is reduced by £1 for each £2 of adjusted income above £260,000 to a minimum annual allowance of £10,000. The reduction is applied up to a minimum annual allowance of £10,000 once adjusted income limit reaches 360. This means the member’s individual tapered annual allowance will be between £60,000 and £10,000. You can work out if the taper applies to you here:

<https://www.gov.uk/guidance/pension-schemes-work-out-your-tapered-annual-allowance>.

As the calculation of the taper is based on levels of pensionable and non- pensionable income from all sources, it may be a factor that requests the Trust receives for reduced hours or a reluctance to take on additional shifts are based on concerns around the impact of the tapered annual allowance.

Currently unused Annual Allowances (AA) from the preceding three tax years can be carried forward, and these can reduce or in some cases eliminate an AA charge that would otherwise apply. If you exceed your AA you will have to report this in your annual tax return, and any pension savings which exceed the AA will be taxed at your marginal rate.

5.2 How does the annual allowance operate

The AA operates differently dependent on the relevant pension scheme arrangement, as summarised in the table below:

	AA
Defined contribution	Total amount of contributions paid in by you or anyone else
Defined benefit (such as the NHS Scheme)	The annual increase in the pension benefits promised to you when you retire in accordance with the rules of the scheme

If you have been building up pension benefits or have pensions savings in more than one registered pension scheme in the UK, you will need to add up the amount in all the pension schemes you belong to when determining if you are approaching or have reached the AA.

5.3 Your Options

If you are currently an active member of the NHS Scheme, and will be affected by the AA you can:

- a. Continue in the NHS Scheme and bear any additional tax charges that arise; or
- b. You can opt out of the NHS Scheme and be paid a separate cash payment as explained in 4.6 below ("Separate Cash Payment").

If you opt out of the NHS Scheme you will become a deferred member. You will also not be able to make any further money purchase additional voluntary contributions into the NHS Scheme.

The Separate Cash Payment that will be paid to you in the event that you opt out of the NHS Pension Scheme will be the sum equivalent to the Employer's Contribution (amount that the employer would pay into the relevant NHS Pension Scheme if you were still a member of that NHS Pension Scheme) net of the employer's National Insurance contributions, maintaining cost neutrality to the NHS. This will be paid as a supplement to your salary and so will be subject to income tax.

The Trust currently makes a 14.38% employer contribution of pensionable pay if a member of people is a member of the NHS Pension Scheme. The supplement in lieu of pension payment will be set at 12.3% which is calculated to include this amount less additional.

Employer National Insurance contributions and allowance for administrative costs of running the scheme.

The Trust will take into account your total pensionable pay to calculate the value of the payment in lieu of pension payment had you continued to participate in the NHS Scheme.

If you opt out of the NHS Pension Scheme, it is your responsibility to provide the People Systems Payroll Liaison Manager with effective notice of the opt-out by submitting a completed and signed SD502 form. You must provide SD502 before any cash payment will be paid. Please refer to the flow chart at the beginning of the policy on where to submit your evidence.

If you opt out of the NHS Scheme there may be a significant impact on the level of benefits you may receive from the NHS Scheme. In particular, there is likely to be a notable reduction in your ill-health benefits and death benefits from the NHS Scheme, and benefits if you were to be made redundant. You should carefully review and consider the impact of opting out of the NHS Scheme on all of your benefits.

This is only one option that may be available to you. Other options may be available. If you are concerned about this issue, you should discuss the matter with the Trust/ Victoria Pay Services to determine the options available to you.

5.3 Impact of the separate cash payment

The Separate Cash Payment will not form part of your base salary and will not be included in the calculation of any overtime, bonus, long-term incentive plan, or other benefit entitlements that you may have.

Although not forming part of your base salary, the Separate Cash Payment will increase the amount that you receive each month. It will also impact on the following:

- A. The amount of holiday pay received by you. Such calculation will include an element to reflect the Separate Cash Payment.
- B. The amount of any redundancy pay calculation, but only in so far as the statutory cap (currently £508). Where your week's pay is higher than the statutory cap applicable at the point of redundancy, then the Separate Cash Payment will not be included in the calculation.

The Separate Cash Payment would be paid in equal monthly instalments in arrears. Payments will be subject to deduction for income tax and national insurance contributions. You may wish to consider whether it would be financially beneficial to you to receive the Separate Cash Payment (subject to income tax and national insurance contributions) as compared with paying an additional pension tax charge by staying in the NHS Scheme, as it will count towards threshold and adjusted income for the assessment of Annual Allowance liability. You should also consider the effect on your pension benefits by staying in the Scheme versus opting out.

You are strongly encouraged to obtain your own financial advice.

As noted at the onset of this policy document, the Trust may amend or remove the policy at any time. The Trusts' discretion is absolute in relation to the policy as a whole and/or its ongoing application to any individual employee, and that discretion will be exercised taking into account the purpose of this policy as set out in Section 2 above.

5.4 Making a request

In order to make a request under this policy you must provide evidence that you are affected (or about to be affected) by the AA (including the tapered AA) if your current pension arrangements continue. First time applicants must currently be an active member of the NHS Pension Scheme and have been so for a minimum of 6 months prior to your application.

Individuals who have made a previous request under this policy, which has been approved and wish to make a further application as they continue to be impacted by the AA in the subsequent year, may be required to submit financial evidence that they continue to be impacted by the AA. For these

individuals' current membership of an NHS Pension Scheme is not required as they will have already opted out of the scheme.

Individuals are responsible for obtaining whatever financial advice is necessary for them to make an informed decision, including where appropriate (though not limited to) professional advice from an accountant or independent financial advisor, guidance from the NHS pension scheme <https://www.nhsbsa.nhs.uk/member-hub/useful-information> information from reputable sources such as professional organisations and unions, HM Revenue & Customs.

Retrospective Evidence that you are or will be affected by the AA will usually be in the form of acceptable document evidence from NHS Business Services (and any other applicable pension provider). Evidence will confirm the annual increase in your NHS pension benefits (and any other contributions paid to any other applicable pension scheme) and acceptable documentary evidence confirming that you may be subject to an annual allowance tax charge. Please note that if you are subject to the tapered annual allowance this may take the form of proof of earnings from all income sources.

Prospective evidence that you will be affected will typically be in the form of pension/pay modelling data, taking into account, for example, incremental pay progression and changes in working patterns and/or proof of projected income from multiple sources.

If your request is granted and the Trust subsequently determines that you did not have reasonable grounds to anticipate being subject to an AA charge, any sum paid to you, as cash payments, in accordance with this policy may be deducted from your salary or any other sums owed to you by the Trust if determined appropriate and reasonable in the circumstances. Vulnerability to AA charge will be judged with regard to the possibility of large Pension Input Amounts in future years through, for example, incremental progression.

If you are interested in taking advantage of this policy, you should speak to the People & Organisational Department (P&OD) before submitting a formal request to change your current pension arrangements. You will be provided with a copy of a Request Form, which will require completing and submitting with the relevant evidence to make a formal request.

In some cases we may need to have a meeting with you before making a decision.

Your request should be made in good time and ideally at least two months before you would like the changes to take effect. The Trust accepts no responsibility for changes to pension benefits or arrangements not being made in sufficient time to avoid the impact of the AA.

If your request is accepted, or where the Trust proposes an alternative to the arrangements you requested, we will write to you with details of the new arrangements, an explanation of the changes to your contract of employment, and the date on which the new arrangements will commence. You will be asked to sign and return a copy of the letter.

Changes to your terms of employment will be permanent. However, the Separate Cash Payment will apply to your current role only. In the event that you apply for or otherwise change roles, then the continuation of the Separate Cash Payment will be at the absolute discretion of the Trust, although not unreasonably withheld.

If your request is refused you will not be able to make another request to change your pension arrangements by means of this policy until twelve months after the date of your most recent request, unless there has been a change in circumstances in terms of how the AA affects you. You will still have a separate right to opt-out of the NHS Scheme or discuss alternative options with your Trust.

5.5 Your responsibilities

The Trust or Payroll Services cannot advise you if the options set out above will be right for you. If you believe that you may be affected by the AA you must take a decision based on your individual circumstances and we strongly advise you take independent financial advice. Some Trade Unions offer advice and information to their members as part of their membership offering.

Evidence that you have taken independent financial advice (such as a statement from your Financial Advisor) or a statement from you that you have fully understood the risks of choosing a particular option with regard to your pension will need to be submitted with your Request Form. The Trust accepts no liability or responsibility for the consequences of any changes to your pension benefits or arrangements, or consequences of no changes being made.

The Trust cannot provide you with financial advice. You may receive certain notifications from the NHS Pension Scheme about your annual allowance. However, ultimately you are responsible for keeping track of your total pension benefits and for managing your personal tax allowances and affairs. You are responsible for notifying the Trust if you are affected by the AA and wish for your pension arrangements to be changed in accordance with this Policy.

You are responsible for monitoring the AA limit in place from time to time. If you are affected by the AA it is your responsibility to report this to HMRC and to ensure that any tax charges are paid.

5.6 Automatic enrolment

If you opt out of the NHS Scheme the Trust will be under an obligation to automatically reenrol you into a qualifying pension scheme in the future. This may be the NHS Scheme. You will need to arrange with the Trust's Pension Manager within Payroll Services to opt out of membership of any qualifying pension scheme you are re-enrolled to before contributions are paid to ensure that further pension benefits do not start to accrue. If you choose to remain within that qualifying pension scheme, any Separate Cash Payment would be reviewed and could be stopped or adjusted to take into account the employer contributions being paid on your behalf.

6 LEARNING/SUPPORT

Support in the application and interpretation of this policy will be provided through the People & Organisational Development Directorate.

7 MONITORING COMPLIANCE WITH THE PROCEDURAL DOCUMENT

A report will be produced six monthly in order to monitor the demand, financial impact and in line with any legislative or national changes. This will be reviewed by Executive Directors.

8 DEFINITIONS

AA	Annual Allowance
HMRC	His Majesties Revenue and Custom
P&OD	People and Organisational Development.

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), the Equality Diversity and Inclusion Policy (CORP/EMP 59) and the Civility, Respect and Resolution Policy (CORP/EMP 58).

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 3)

10 ASSOCIATED TRUST PROCEDURAL DOCUMENTS

Equality Analysis Policy – CORP/EMP 27

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 UK General Data Protection Regulation (GDPR) 2021.

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/information-governance/>

12 REFERENCES

NHS Employers – Annual Allowance: <https://www.nhsemployers.org/publications/annual-allowance>

NHS Pension Scheme: <https://www.nhsemployers.org/pensions>

Reduced (tapered) Annual Allowance: <https://www.gov.uk/guidance/pension-schemes-work-out-your-tapered-annual-allowance>

APPENDIX 1 – APPLICATION FORM

The following form is designed as a stand-alone form that can easily be completed by people wishing to apply for the cash payment.

The form will be maintained by the Personal Assistant of the Chief People Officer and can be circulated to people wishing to apply as a separate document.

Pension's Contribution Alternative Reward (AA) Request form

Full Name:			
Job Title:			
Assignment No.			
NHS Pension Scheme membership reference		Proposed NHS Pension scheme opt out date:	
☒	Please tick confirmation/understanding		
	I have read and understood the Pension Contribution Alternative Award Policy		
	am affected (or about to be affected) by the Annual Allowance if my current pension arrangements continue		
	I have provided evidence I am affected (as per section 5.4 of the policy) and have detailed below		
	I have obtained whatever advice is necessary to allow me to make an informed decision in relation to this application		
	I have provided (as per the policy) evidence of advice and have listed below		
	The policy and the separate cash payment do not form part of my contract of employment		
	The Trust may amend or remove this policy and payment at its sole and absolute discretion		
	The separate Cash Payment does not form part of my base salary and is not included in the calculation of any overtime, bonus, long-term incentive plan, or other benefit entitlements that I may have		
	Payments will be subject to deduction for income tax and national insurance contributions		
	The Trust accepts no liability or responsibility for the consequences of any changes to my pension benefits or arrangements, or any consequences of no changes being made. I have considered and understand that opting out of the NHS Pensions Scheme may have a significant effect on my pension, ill health, death and redundancy benefits from the NHS Pension Scheme.		

Please list documents supporting your evidence (including calculations) and having sought advice:

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Signature *:	
Date:	
If you are submitting this form electronically via email then please type your name if you are unable to provide an electronic signature. Your email submission will be taken as your electronic signature in such instances	

APPENDIX 2 – FORM SD502

The form '*Application to leave the NHS Pension Scheme (SD502)*' should be completed by those who wish to opt out of leave the NHS Pension scheme and is available to download from the NHS Pensions website at the following link where further useful information regarding pensions can also be found:

<https://www.nhsbsa.nhs.uk/member-hub/leaving-or-taking-break-scheme>

Application to leave the NHS Pension Scheme: (SD502)

Application to leave the NHS Pension Scheme (SD502)

Opting out - important information

The benefits payable from the NHS Pension Scheme are valuable and anyone considering opting out of the Scheme should think very carefully before making such an important decision. Before you decide, please look at the member information on our website at: www.nhsbsa.nhs.uk/Pensions, especially the relevant Scheme Guide, factsheets, and the Leaving Early and Transferring Out Guide.

Some general points to help you decide

- As a Scheme member you pay a contribution based on your pensionable pay. Your NHS employer also contributes 14.3% of your salary towards your pension
- Contributions are deducted before tax so you receive tax relief on any amount you pay
- There is a calculator on the NHS Pensions website which you can use to see some of the impacts of opting out
- Unless you are absent from duty for any reason you may apply to join or re-join the Scheme at any time subject to Scheme rules
- If you wish to opt out from the start of your NHS employment you must complete form SD502 within the first month.

Benefits you will be giving up if you opt out of the NHS Pension Scheme

- Your right to any further benefits from the Scheme in this employment
- A pension payable for life fully guaranteed by the Government
- If you are a member of the 1995 Section you will also get a retirement lump sum. This is usually tax free
- If you opted out before 1 April 2008 and do not re-join this Scheme you will not have the option of giving up some of your pension for a bigger lump sum. This option would normally allow you to receive £12 of lump sum for every £1 of pension you give up. Lump sums are usually tax free
- Enhanced ill health retirement benefits if you become too ill to work
- Life assurance cover (a lump sum payment) and family benefits if you die – pension benefits for your dependants, including children.

Think Carefully!

Deciding to opt out of your employer's occupational pension scheme is a major financial decision. If you are in any doubt about which pension arrangement will be best for you, you may wish to seek **independent** financial advice. Before you ask for advice, make sure you know which type of financial

adviser you are dealing with. Most financial advisers will charge for their advice. The Scheme Guide available on the NHS Pensions website may be able to help you find local independent financial advice, please refer to the help and general information section of the guide.

Pension scams: A lifetime's savings lost in a moment

The Pension scams awareness booklet for members is available on the Pensions Regulator website at: <http://www.thepensionsregulator.gov.uk/individuals/dangers-of-pension-scams.aspx>

Completing the form

If, after reading all the relevant information, you decide that you want to opt out of the NHS Pension Scheme you **must** ensure both Part 1 and send it with Part 2 to the Payroll Department at your place of work. It is important that this form reach them as soon as possible to enable them to update your details and cease the deduction of contributions. Your employer will complete Part 2 and send the details to us. If you work for more than one NHS employer, you will need to complete a separate form for each employer. This form cannot be signed until after you have joined the NHS Pension Scheme.

Data Protection Act 1998. NHS Pensions will use any information you provide in connection with the NHS Pension Scheme to administer and operate the scheme and pay benefits under it. This may include passing details to third parties that are involved in the administration and operation of the scheme. The Department of Health (DH) may also use your data for administrative purposes in line with its data protection notification. In order to fulfil its duty to protect public money, DH may use information it holds to prevent and detect fraud. It may also share information with other organisations that handle public funds. **If there is any difference between the legislation governing the NHS Pension Scheme and the information in this leaflet, the legislation will apply.**

A link to the form is provided here:

<https://www.nhs.uk/sites/default/files/2018-05/SD502%20%28V19%29%2005.2018.pdf>

APPENDIX 3 - EQUALITY IMPACT ASSESSMENT PART 1 INITIAL SCREENING

Service/Function/Policy/Project/Strategy	Division	Assessor (s)	New or Existing Policy?	Date of Assessment
CORP/EMP 53	PFG	Anthony Jones	Existing	May 2026
1) Who is responsible for this policy? Name of Division/Directorate: People & 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 retain members of Team DBTH				
3) Are there any associated objectives? Legislation, targets national expectation, standards: Retention of Team DBTH people				
4) What factors contribute or detract from achieving intended outcomes? – Not applicable				
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				
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? [any actions to be taken] No				
7) Are any of the following groups adversely affected by the policy?				
Protected Characteristics	Affected?	Impact		
a) Age	No	N/A		
b) Disability	No	N/A		
c) Gender	No	N/A		
d) Gender Reassignment	No	N/A		
e) Marriage/Civil Partnership	No	N/A		
f) Maternity/Pregnancy	No	N/A		
g) Race	No	N/A		
h) Religion/Belief	No	N/A		
i) Sexual Orientation	No	N/A		
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: November 2028 (Policy Valid Until April 2029)				
Checked by: Adam Evans		Date: May 2026		