Department of Education
www.education-ni.gov.uk

DEPARTMENT OF EDUCATION

EQUALITY AND HUMAN RIGHTS POLICY SCREENING

FOR

CESSATION OF MONTHLY PRINTED PENSION ADVICE SLIPS FOR RETIRED TEACHERS

GUIDANCE

- Please note that this document should always be referred to as an Equality Screening not an Equality Impact Assessment (which is a more detailed document requiring a consultation period of at least three months).
- Please use easy to understand language and short sentences. Try to aim for a comprehension level for a P7 pupil.
- Hyperlinks may be added (as can annexes) but avoid tables.
- The screening must explain which Section 75 categories are likely to benefit from (or be impacted by) the policy and how/why this is likely.
- The screening should show data/statistics specific to the "policy" being screened.
- Monitoring (follow-up action) is an important part of the screening.

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Revised December 2021

Equality Screening:

Cessation of Monthly Printed Pension Advice Slips for Retired Teachers

Further advice can be found in ECNI - Screening for Public Authorities, Effective Section 75 Equality Assessments: Screening and Equality Assessments (ECNI. 2017) and Section 75: Using Evidence in Policy Making - a signposting guide

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PART ONE
BACKGROUND

1.1 Title of policy

Cessation of monthly printed Pension Advice Slips for Retired Teachers

1.2 Type of policy.

This is a revised policy.

1.3 Description of the policy:

The Department of Education's (DE) Teachers' Pay and Pensions Team (TPPT) administers the Northern Ireland Teachers' Pension Scheme (NITPS). DE introduced a new Pensions System in November 2020. The next stage of this system is the introduction of an online portal for NITPS members. This will allow pensioner members to view their current pension details such as monthly pension advice slips and P60s. The introduction of the online portal will mean that pensioner members will no longer automatically receive a paper copy of their monthly pension advice slip in the post each month, with effect from April 2022. However, in exceptional circumstances, pensioners can still request to receive a monthly printed pension advice slip in the post.

The online portal will provide web access facilities for active, deferred, and pensioner members of the NITPS to view and check their personal and pension related information held on the system and in certain instances update their personal information.

All members will be required to register to access the online portal. Upon registration, the portal will enable all members, active, deferred and pensioner members to access their pension record, including for pensioner members, their payroll details, securely. This will reduce administration costs by approximately £18K per month.

This policy change is being applied equally to all pensioners and is not detrimental to any recipient of a Teacher's pension as pensions will continue to be paid into recipients' nominated bank or building society accounts, and the change brings us into line with other public sector

pension schemes who have already ceased providing monthly printed pension advice slips i.e. other NI public service pension schemes.

1.4 What factors could contribute to, or detract from the intended aim/outcome of the revised policy? (Please delete as appropriate)

None

1.5 Main stakeholders affected:

Retired teachers (pensioners)

1.6 Who is responsible for?

(a) Devising the revised policy

DE

(b) Implementing it

DE

(c) Explain the relationship?

DE has a statutory obligation to manage the NITPS. On a day to day basis, DE administers the scheme through TPPT. NITPS administration activities include ensuring pensioners are paid, current members and their employers make regular contributions to the scheme, and payments are made as appropriate to bodies such as HMRC. NITPS scheme administration and governance is regulated by The Pensions Regulator and subject to pensions, public finance and other legislation

1.7 Other policies or objectives with a bearing on this revised policy

NI Civil Service Pensions ceased to provide monthly printed pension advice slips from June 2021.

EVIDENCE

1.8 What evidence/information (both qualitative and quantitative) have you gathered to inform this revised policy in respect of each of the categories?

Religious Belief

None. There is no indication that this policy will disproportionately impact on the basis of religious belief.

Political Opinion

None. There is no indication that this policy will disproportionately impact on the basis of political opinion.

Racial Group

None. There is no indication that this policy will disproportionately impact on the basis of racial group.

Age

The Continuous Household Survey collates data on internet access by age and area i.e. urban and rural. The most recent dataset for which an age breakdown is available (2019/2020) is available via https://www.nisra.gov.uk/publications/chs-results. It reports that 70% of those aged range 60-69 have access to the internet, reducing to 57% for those aged 70-79, and 30% for those aged over 80s. The dataset reports 78% in both an urban and rural setting have access to the internet.

Marital Status

None. There is no indication that this policy will disproportionately impact on the basis of marital status.

Sexual Orientation

None. There is no indication that this policy will disproportionately impact on the basis of sexual orientation.

Men And Women Generally

None. There is no indication that this policy will disproportionately impact men and women generally.

Disability

None. There is no indication that this policy will disproportionately impact on the basis of disability for the reasons set out in the next section.

Dependants

None. There is no indication that this policy will disproportionately impact dependants.

NEEDS, EXPERIENCES AND PRIORITIES

1.9 Taking into account the evidence gathered at 1.8 what are the needs, experiences and priorities of each category in relation to this revised policy?

Religious Belief
N/A

Political Opinion
N/A

Racial Group
N/A

Age
Internet Access

Marital Status
N/A

Sexual Orientation
N/A

Men and Women Generally
N/A

Disability
N/A

Dependants
N/A

PART TWO – SCREENING QUESTIONS

LIKELY IMPACT

2.1 What is the likely impact of this policy/policy review/revised policy/ pilot/project on equality of opportunity for each of the Section 75 equality categories?

Religious Belief	None
Political Opinion	None
Racial Group	None
Age	Minor

There is no change in how pensions are being paid, teacher's pensions will continue to be paid on a monthly basis directly into the pensioner's nominated bank account. In exceptional circumstances, pensioners can still request to receive a monthly printed pension advice slip in the post.

Marital Status	None
Sexual Orientation	None
Men And Women Generally	None
Disability	None

Software designed to run on the most commonly used operating systems like Windows, Mac OS, Android and iOS to assist users who are blind, visually impaired, illiterate, or have a learning disability will continue to operate.

Dependants	None

OPPORTUNITIES TO BETTER PROMOTE EQUALITY OF OPPORTUNITY

2.2 Are there opportunities to better promote equality of opportunity for people within the Section 75 equality categories?

Religious Belief	No
Political Opinion	No
Racial Group	No
Age	No
Marital Status	No
Sexual Orientation	No
Men and Women Generally	No
Disability	No
Dependants	No

LIKELY IMPACT ON GOOD RELATIONS

2.3 To what extent is the revised policy likely to impact on good relations between people of different religious belief, political opinion or racial group?

Religious belief	None
Political opinion	None
Racial group	None

2.4 Are there opportunities to better promote good relations between people of different religious belief, political opinion or racial group?

Religious belief	No
Political opinion	No
Racial group	No

MULTIPLE IDENTITIES

2.5 Please provide details of data on the impact of the revised policy with multiple identities and specify relevant Section 75 categories concerned.

There are no identifiable potential impacts of this policy on people with multiple identities.

PART THREE
SCREENING DECISION

3.1

Option b - The decision is not to conduct an equality impact assessment but with mitigation or the introduction of an alternative policy.

Reasons

There is no change in how pensions are being paid, teacher's pensions will continue to be paid on a monthly basis directly into the pensioner's nominated bank account. In exceptional circumstances, pensioners can still request to receive a monthly printed pension advice slip in the post.

It is important to note that there is no change in how pensions are being paid.

Pensioner members have been advised that they will be able to view and print their monthly pension advice slips via the online portal. They have also been advised that paper copies of their monthly pension advice slips will cease once the online portal goes live. However, those Members who have expressed concern about no longer receiving a monthly printed pension advice slip in the post have been advised that they can continue to receive one if they so desire.

All members will receive a letter including step by step guidance on how to register and access the online portal. This will also be published on the Teachers' Pension section of DE's website prior to its launch.

MITIGATION

3.2 **Reasons** to support the decision, together with the proposed changes/amendments or alternative policy.

- There is no change in how pensions are being paid, teacher's pensions will continue to be paid on a monthly basis directly into the pensioner's nominated bank account.

- In exceptional circumstances, pensioners can still request a monthly printed pension advice slip.

- For disabled users, software which is designed to run on the most commonly used operating systems like Windows, Mac OS, Android and iOS is available. It renders text and image content as speech or braille output, it assists users who are blind, and is useful to people who are visually impaired, illiterate, or have a learning disability.

- A downloadable screen reader can be obtained i.e. the RNIB has additional sources of information:

https://www.rnib.org.uk/sight-loss-advice/technology-and-useful-products/technology-resource-hub-latest-facts-tips-and-guides/screen-reading-software

PART FOUR
MONITORING

- The Department of Education will continue to monitor the results from future Continuous Household Surveys in terms of individual internet access by age and area type.

PART FIVE
DISABILITY DISCRIMINATION

5.1 Will the revised policy in any way discourage persons with disabilities from participating in public life or fail to promote positive attitudes towards persons with disabilities?

No

5.2 Is there an opportunity to better promote positive attitudes towards persons with disabilities or encourage participation in public life by making changes to the revised policy or introducing additional measures?

No

5.3 Please detail what data you will collect in the future in order to monitor the effect of the revised policy with reference to the disability duties.

None

PART SIX
HUMAN RIGHTS ISSUES

6.1 Does the policy/policy review/revised policy/pilot/project review/revised policy/pilot/project affect anyone's Human Rights?

Particularly consider:

- The Human Rights Act (1998)
- The United Nations Convention on the Rights of the Child
- The United Nations Convention on the Rights of Persons with Disabilities
- The United Nations Convention on the Elimination of All Forms of Discrimination Against Women (CEDAW)

No

6.2 If you have identified a negative impact; what Human Right is impacted, what is the nature of the impact and who is affected and how?

N/A

At this stage you should determine whether to seek legal advice and to refer the issue to the Equality Unit to consider:

- whether there is a law which allows you to interfere with or restrict rights;
- whether this interference or restriction is necessary and proportionate; and
- what action would be required to reduce the level of interference restriction.

6.3 Outline any actions which could be taken to promote or raise awareness of human rights or to ensure compliance with the legislation in relation to the policy/policy review/revised policy/pilot/project.

N/A

PART SEVEN

RURAL NEEDS

The undertaking of a Rural Needs Impact Assessment (RNIA) is an integral part of the development, adoption, implementation or review of a policy, strategy or plan or the design or delivery of a public service.

Will a separate RNIA be completed? No

Reason for non-completion: The Department will provide monthly printed pension advice slips, upon request, if internet/ broadband service is poor/ unavailable in a rural area.

Completed RNIA's are published on the Department's Internet site and shown under Rural Needs Impact Assessments.

PART EIGHT
APPROVAL AND AUTHORISATION

FOR COMPLETION BY POLICY TEAM

Screened by:	Elaine Boyd	Grade EOI	Date 13/12//2021
Approved by:	Ian Gallagher	Grade 7	Date 13/12/2021
	Brian Quinn	Grade 7	Date 13/12/2021

Notes:

The Screening Form must be approved and 'signed off' by a senior manager responsible for the policy.

The TRIM version of the completed Screening Form must be sent to the Equality Team (DE.Equality@education-ni.gov.uk) for quality assurance

FOR COMPLETION BY EQUALITY TEAM

Screening Decision	Agreed	
Quality Assured by:	R Magowan	Date 17/12/21
Team Informed:		Date 17/12/21

RECORDING AND PUBLISHING BY POLICY TEAM

You must store this completed screening form on Content Manager and finalise it. Use the record naming convention "Completed Screening form of……"

Content Manager Ref No: ED1/22/850

Placed on Internet by policy team Date 28/01/22

As soon as possible, following quality assurance, you must publish a copy of the screening form in Microsoft Word (or other Open Document Format) on the Department's website: https://www.education-ni.gov.uk/publications with a link on the "Policy Screening" page: https://www.education-ni.gov.uk/de-equality-screenings