

Freedom of Information Team  
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Tel: 023 9228 6000 Ext 3708

Name:  
Date: 27/11/2019  
Ref: 19-20 300

Dear

### **Freedom of Information request**

Firstly please accept our sincere apologies for the delay in responding to you.

Thank you for your request for information under the Freedom of Information Act 2000, which was received by our Freedom of Information team on 29/08/2019. You have requested the following:

**1. Whether your organisation has a policy of offering payment equivalent to the employer pension fund contributions to employees who opt out of the scheme?** Please see attachments below.



Alternative Pension  
Award Policy.doc



Pension Measures  
briefing final.docx

**And if so:**

- a) when was this policy adopted?** Issued on 10<sup>th</sup> October 2019
- b) is this option offered to all employees by default, or is it considered on a case by case basis following requests?** All employees who meet the criteria in the attached policy
- c) how many employees have taken advantage of this policy since its adoption?** 28 employees
- d) what was the total value of payments made until the end of July 2019?** The alternative arrangements were not offered until after July 2019.

**2. Whether your organisation has made an assessment of the number of employees who are likely breach the annual allowance? If so, what assessment was made?** No, this has not been undertaken due to the complexity of the assessment with earnings outside of the NHS.

**3. How many employees have left employment as a result of pension taxation issues? We cannot say how many staff have left or reduced their hours because of a potential pension tax liability as that is not an option on the leaver's questionnaire on ESR.**

**4. How many employees have applied to reduce their working hours as a result of pension taxation issues? And how many such applications were successful?** We cannot identify those who might have wanted to reduce their hours, as the Trust is not informed by the Pension Scheme who is facing this liability. We also cannot identify them as the annual allowance includes all their earnings, so it is not based on just their employment with the Trust.

Requests to reduce hours are dealt with by line managers within the Trust, and there is no central record of requests to reduce hours or those that are approved or rejected.

**5. Whether an internal briefing or assessment on the impact of changes to pension taxation has been provided? If so, could a copy of that document be provided?**

The Trust has undertaken a number of activities to raise awareness of the impact of the pension tax liability including a paper to the Trust Leadership Team, invited independent financial advisors to speak to interested employees, shared BMA advice etc. A briefing was also provided with information on the Alternative Pension Award.

Please accept this letter as completion of your request. Please note that copies of this request will be held on file for three years before being confidentially destroyed.

If you are dissatisfied with the outcome of your request, please contact our Head of Information Governance on [Information.Governance@porthosp.nhs.uk](mailto:Information.Governance@porthosp.nhs.uk) or write to the above address and we will conduct an internal review. Upon review, if you are still dissatisfied, you may appeal our decision by contacting the Information Commissioner's Office; for more information please visit the [ICO's website](#).

Please be aware, if we do not receive an appeal within 30 days of you receiving this letter, we will assume that you are satisfied with our response. If you have any further queries, please do not hesitate to contact us.

Yours sincerely

Freedom of Information Team