
Julie Badon – Section Head NHS Pension Team

September 2014
Review Background

The Access and new Fair Deal stakeholder agreement included a commitment to review the arrangements in the light of the original policy aims and provide:

• An evaluation of the revised Access policy to date
• An assessment of how successfully the arrangements have been implemented
• A summary of the feedback from all stakeholder groups
• Where necessary, further recommendations for how the new arrangements could evolve, and
• Identification of any barriers to the policy.

HM Treasury recommended that the reviews be conducted at 1 and 5 year intervals.
Policy Aims

• Delivery of fair playing field in pension access

• Enable a good standard of occupational pension across providers of NHS contracts

• Continued viability of the NHS Pension Scheme

• Continued access to the NHS Pension Scheme for staff delivering NHS services enabling portability of pension

• Support and build on the Treasury New Fair Deal policy
Scope of the review

- Coverage and effectiveness of the regulations
- Ease of implementation
- Uptake of access to the NHSPS
- Impact on existing NHS access arrangements
- Effectiveness of new control mechanisms
- Instances of disputes/challenges
- Impact on the government’s balance sheet
- Impact of the new Hutton arrangements
Review Data

• What data is required?

• What format is required?

• Implications for commissioners, providers?

• Gathering soft intelligence?

• How do we gather intelligence from those not engaging in the policy?
Timings

• The main review work will take place between October 2014 and March 2015

• The final report will be available in May 2015

• A further review will be carried out in year 5 to allow for both a short and longer term assessment of their effectiveness