



**The Clatterbridge
Cancer Centre**
NHS Foundation Trust

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Date: 18 September 2019

Re: Freedom of Information Request
Ref: 242 - 2019

Thank you for your email dated the 29th August 2019, requesting information in relation to pension tax relief.

The information that you require is as follows:

I am writing to request information relating to the pension tax relief issue that is currently impacting a significant number of NHS employees across the country. I would be grateful if you could respond to the following questions. Please advise if you need any clarification and I would be happy to provide this.

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?

The Trust does not have a policy of offering payment equivalent to the employer pension fund contributions to employees who opt out of the scheme

And if so:

a) when was this policy adopted?

Not Applicable, see answer to question 1

b) is this option offered to all employees by default, or is it considered on a case by case basis following requests?

Not Applicable, see answer to question 1

c) how many employees have taken advantage of this policy since its adoption?

Not Applicable, see answer to question 1

d) what was the total value of payments made until the end of July 2019?

Not Applicable, see answer to question 1

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 assessment has been done to date.

3. How many employees have left employment as a result of pension taxation issues?

No employees have left employment as a result of pension taxation issues

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?

No employees have applied to reduce their working hours as a result of pension taxation issues

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's Director of Workforce & Organisational Development has provided an email briefing to Clinicians and Senior Managers advising them to seek independent advice. British Medical Association have been on site

and delivered a briefing session to Doctors. For copy of the briefing, see

Appendix 1

Should you require any further information please do not hesitate to contact me on the email address provided below.

Please remember to quote the reference number above in any future communications.

If you are dissatisfied with the handling of your request, you have the right to ask for this to be investigated internally.

If you are dissatisfied with the information you have received, you have the right to ask for an internal review.

Both processes will be handled in accordance with our Trust's Freedom of Information Policy and the Freedom of Information Act 2000.

Internal investigation and internal review requests should be submitted within two months of the date of receipt of the response to your original letter and should be addressed to: Freedom of Information Review, The Clatterbridge Cancer Centre NHS Foundation Trust, Clatterbridge Road, Bebington, Wirral, CH63 4JY

If you are not satisfied with the outcome of the internal investigation/review, you have the right to apply directly to the Information Commissioner for a decision. The Information Commissioner can be contacted at: Information Commissioner's Office, Wycliffe House, Water Lane, Wilmslow, Cheshire, SK9 5AF.

Appendix 1

Dear colleague

I want to update you on a number of key developments in relation to pension scheme reform and the impact of taxation policy.

1) The Department of Health and Social Care is currently consulting on a range of proposals to reform the NHS Pension Scheme

The consultation which was launched last week shows a willingness and commitment from government to reform the scheme to address the impact of pension taxation on the NHS. It is pleasing to see that the government is not only asking for feedback on its original proposal to introduce a 50:50 section for senior clinicians, but is also actively seeking views and suggestions on:

- whether scheme flexibilities should be targeted at senior clinicians or employees with high earnings
- a proposal to introduce a new 50:50 section, where members can choose to pay half the contribution rate in return for half the value of benefits
- how the 50:50 proposal could be developed further and alternative proposals
- how staff can be supported to understand pension tax issues
- improving how scheme pays works
- the equality impact assessment of the proposals.

NHS Employers will be submitting a response to the consultation on behalf of employers. If you would like to inform the response from The Clatterbridge Cancer Centre please share your comments and views with Jenny Grant, Deputy Director of Workforce and OD before 7 August 2019 by emailing jenny.grant@nhs.net. Additionally, the NHS Confederation is asking the new government to consider a change to the annual allowance tax policy; in particular, they are asking for the taper that is applied to be removed.

2) New pension resources

NHS Employers has published two new resources this week to support staff around the impact of pension tax issues:

- [A list of organisations](#) that are able to advise and support members of the NHS Pension Scheme with pension tax issues. Please note neither NHS Employers or The

Clatterbridge Cancer Centre are not able to recommend or endorse the firms but recognise the need to highlight and signpost organisations with an understanding of the pension schemes in the NHS.

- An [infographic](#) that highlights the key dates and actions on the annual allowance cycle. Please note the next key date is 31 July 2019 which is when employees should notify NHS Pensions of their intention to use scheme pays. For ease of reference the key dates are also provided below:
- **6 July – Employers send pay and membership data for the previous year to NHS Pensions**
- **31 July – Employees must inform NHS Pensions if they wish to use scheme pays to settle a tax charge from the year before the previous tax year**
- **6 October – NHS Pensions will send pension savings statements to relevant scheme members to confirm the value of their pension savings over the last tax year**
- **31 January – Employees must submit their self-assessment tax return to HMRC**
- **5 April – end of tax year**

3) Next steps

NHS Employers continue to work alongside the NHS Scheme Advisory Board (SAB), a partnership board made up of employer and trade union representatives, to develop the options for scheme flexibilities for all members. The board recognise the urgency and impact of the pension taxation issues as well as the potential for the scheme to be modernised to support retention. The detailed analysis of options to allow all members to better control the value of their pension growth is progressing at pace and a recommendation will be submitted to the Secretary of State for Health and Social Care soon.

I will continue to update with information as and when it becomes available.

Kind regards
Jayne

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