

Appendix B: Equality Impact Assessment

For support in completing this EQIA, please consult the EQIA Guidance Document or contact equality@rbwm.gov.uk

www.rbwm.gov.uk



1. Background Information

Title of policy/strategy/plan:	Customer Relationship Management procurement
Service area:	<u>HR, Corporate Projects and IT</u>
Directorate:	<u>Resources</u>

Provide a brief explanation of the proposal:

- What are its intended outcomes?
- Who will deliver it?
- Is it a new proposal or a change to an existing one?

The project aim is the procurement of a Customer Relationship Management (CRM) system.

The project will be delivered by the Transformation and Digital team with involvement from IT, Library and Resident services and other CRM users.

2. Relevance Check

Is this proposal likely to directly impact people, communities or RBWM employees?

- If Yes, state 'Yes' and proceed to Section 3.
- If No, please explain why not, including how you've considered equality issues.
- Will this proposal need a EQIA at a later stage? (for example, for a forthcoming action plan)

Yes

If 'No', proceed to 'Sign off'. If unsure, please contact equality@rbwm.gov.uk

3. Evidence Gathering and Stakeholder Engagement

Who will be affected by this proposal?

For example, users of a particular service, residents of a geographical area, staff

Residents with a 'My RBWM' account are likely to need to re-register in the event of a new provider winning the procurement, although there is a possibility that the accounts could be transferred over from the current CRM system to the new one if this were the case. This will not be determined until the procurement exercise is concluded but in either case, our customers should notice no difference to the online offering other than a very slightly different look and feel of the forms and account pages.

Staff who currently use the CRM to manage their cases will be provided with any relevant training needed prior to go live and their processes will be fully rebuilt in the event a new system is being implemented, in careful collaboration with them.

Among those affected by the proposal, are protected characteristics (age, sex, disability, race, religion, sexual orientation, gender reassignment, pregnancy/maternity, marriage/civil partnership) disproportionately represented?

For example, compared to the general population do a higher proportion have disabilities?

Accessibility of the site will be carefully monitored, and all regulations will be adhered to so nobody will be disproportionately affected.

What engagement/consultation has been undertaken or planned?

- How has/will equality considerations be taken into account?
- Where known, what were the outcomes of this engagement?

This cannot take place until a new provider has been chosen.

What sources of data and evidence have been used in this assessment?

Please consult the [EQIA Evidence Matrix](#) for relevant data. Examples of other possible sources of information are in the Guidance document (Section 2.3).

Not applicable at this stage

4. Equality Analysis

Please detail, **using supporting evidence**:

- How the protected characteristics below might influence the needs and experiences of individuals, in relation to this proposal.
- How these characteristics might affect the impact of this proposal.

Tick positive/negative impact as appropriate. If there is no impact, or a neutral impact, state 'Not Applicable'.

More information on each protected characteristic is provided in the EQIA Guidance document (available on the intranet).

	Details and supporting evidence	Potential positive impact	Potential negative impact
Age	In some cases, age could be an barrier to accessing online tools. There is support available in person and on the phone to help residents that request it and this will remain in place.		x
Disability	In some cases, disability could be an barrier to accessing online tools. There is support available in person and on the phone to help residents that request it and this will remain n place. Accessibility will remain at the forefront of our requirements so should have no impact – not applicable.		x
Sex	Not applicable		
Race, ethnicity and religion	Not applicable		
Sexual orientation and gender reassignment	Not applicable		
Pregnancy and maternity	Not applicable		
Marriage and civil partnership	Not applicable		
Armed forces community	Not applicable		
Socio-economic considerations e.g. low income, poverty	Not applicable		

Children in care/Care leavers	Not applicable		
-------------------------------	----------------	--	--

5. Impact Assessment and Monitoring

If you have not identified any disproportionate impacts and the questions below are not applicable, leave them blank and proceed to Sign Off.

<p>What measures have been taken to ensure that groups with protected characteristics are able to benefit from this change, or are not disadvantaged by it? For example, adjustments needed to accommodate the needs of a particular group</p> <p>Not applicable at this stage, will be picked up as part of the procurement process</p>
<p>Where a potential negative impact cannot be avoided, what measures have been put in place to mitigate or minimise this?</p> <ul style="list-style-type: none"> For planned future actions, provide the name of the responsible individual and the target date for implementation. <p>Not applicable at this stage, will be picked up as part of the procurement process</p>
<p>How will the equality impacts identified here be monitored and reviewed in the future?</p> <p>This will be picked up as part of the procurement process</p>

6. Sign Off

Completed by: Eleanor Nicholson	Date: 22/02/23
Approved by: Nikki Craig	Date: 08/03/23

If this version of the EQIA has been reviewed and/or updated:

Reviewed by:	Date:
---------------------	--------------