



## Equality Impact Assessment Template

Before carrying out EqIA, you should familiarise yourself with the University's EqIA Policy Statement and Guidance and Checklist Notes, and undertake our online training on Equality and Diversity and EqIA. These, along with further information and resources, are available at [www.ed.ac.uk/schools-departments/equality-diversity/impact-assessment](http://www.ed.ac.uk/schools-departments/equality-diversity/impact-assessment)

EqIA covers policies, provisions, criteria, functions, practices and activities, including decisions and the delivery of services, but will be referred to as 'policy/practice' hereinafter.

**A. Policy/Practice (name or brief description):**

**Power BI – data reporting and analytics tool**

**Power BI enables users to create reports, prepare data, and perform analytics. It is a Software as a Service (SaaS) product developed by Microsoft, meaning that it is hosted by Microsoft's datacenters and distributed on a subscription basis. Thus, software upgrades are automatically pushed through by Microsoft.**

**Around 550 people in the administration, Information Services, and across the academic departments currently have access to Power BI at the University of Edinburgh. We plan to give access to every member of staff by July 2018 so all are able to access reports created on Power BI. Eventually, it will be launched as a unified reporting and analytic service for the University.**

**B. Reason for Equality Impact Assessment (Mark **yes** against the applicable reason):**

- Proposed new policy/practice
- Proposed change to an existing policy/practice
- Undertaking a review of an existing policy/practice YES**
- Other (please state):

**C. Person responsible for the policy area or practice:**

Name: **Alex Carter**

Job title: **Head of Service Management**

School/service/unit: **Applications Directorate, Information Services Group**

**D. An Impact Assessment should be carried out if any of the following apply to the policy/practice, if it:**

- Affects primary or high level functions of the University YES**
- is relevant to the promotion of equality (in terms of the Public Sector Equality Duty 'needs' as set out in the Policy and Guidance)? YES**
- It is one which interested parties could reasonably expect the University to have carried out an EqIA? YES**

**E. Equality Groups**

To which equality groups is the policy/practice relevant and why? (add notes against the following applicable equality group/s)

- Age
- Disability
- race (including ethnicity and nationality)
- religion or belief
- sex
- sexual orientation
- gender reassignment
- pregnancy and maternity
- marriage or civil partnership<sup>1</sup>

**All groups are potentially impacted by the use of Power BI as it is a service which will be available to all staff across the University by July 2018. However, we feel that the protected characteristics of disability, race, religion, and pregnancy/maternity are most likely to be impacted.**

**Power BI must be accessible to disabled users in line with the Web Content Accessibility Guidelines AA standards (<https://www.w3.org/TR/WCAG20/>) and compatible with assistive technology. For people who wish to create reports on Power BI, training is available online through video tutorials on Lynda.com (which is committed to Section 508 accessibility, a set of guidelines described in a US Federal law). Lynda.com is available to all University Staff and Students. Microsoft also offers its own online learning guide for Power BI free of charge (<https://docs.microsoft.com/en-us/power-bi/guided-learning/index>). Additionally, we plan to develop University-specific tutorial documents, which will be printable, and could be made available as a Word document upon request. The University-specific manual will be uploaded to the University website, which adheres to the University Web Accessibility Policy based around the Web Content Accessibility Guidelines Version 2 AA standard as required by law. We will provide reasonable adjustments for disabled members of staff where required.**

**There is also the potential for positive impact for people with a disability, religious commitments, pregnancy and maternity (and thus people who are women), caring responsibilities, or who are living abroad. The 24/7 capabilities of Power BI allow people who are not able to work during regular office hours to access reports at their convenience. Additionally, the functionalities of Power BI could assist the University in furthering its commitment to equality and diversity initiatives. For example, Power BI could facilitate projects related to assessing the diversity of staff hires and the student body by analysing data on the current composition of staff and students to identify areas of underrepresentation.**

**In terms of race, Power BI has the additional benefit of being available in 44 different languages, which could better cater to staff members for whom English is not their first language. Finally, Power BI is more user-friendly and aesthetically pleasing than the current existing software used by the University.**

**The data in reports created by Power BI is limited by University regulations on data protection, and all University employees must undergo data protection training. Staff are only able to view reports and data that they have been given access to. This practice mitigates any privacy concerns that may arise. Any staff member found to be creating reports that do not comport with the University's data protection policy (e.g.**

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<sup>1</sup> Note: only the duty to eliminate discrimination applies to marriage and civil partnership. There is no need to have regard to advancing equality or opportunity or fostering good relations in this respect.

reports that might identify individuals with specific characteristics, which may lead to discriminatory behaviours) would be subject to the University disciplinary procedures.

Add notes against the following applicable statements:

- On any available information about the needs of relevant equality groups:  
**Power BI was purchased because it is more user-friendly and aesthetically-pleasing than the current existing software (Business Intelligence Suite). The University hopes to shift to using Power BI as its main analytics tool to keep up to date with developments in business intelligence technology.**

**Users are able to submit complaints or comments about Power BI via Unidesk, the University's incident logging and tracking tool. We have not received any diversity and equality complaints for Power BI. The Information Services Disability Information Officer has tested the interface in accordance with the Web Content Accessibility Guidelines AA standard including checking the systems for compatibility with assistive technology. Any areas for improvement have been noted and are dealt with accordingly.**

- Any gaps in evidence/insufficient information to properly assess the policy, and how this be will be addressed:  
**We feel we have enough evidence to proceed. We will monitor feedback we collect for any positive and negative effects related to any of the nine protected characteristics.**

- If application of this policy/practice leads to discrimination (direct or indirect), harassment, victimisation, less favourable treatment for particular equality groups:  
**We do not believe that the use of Power BI will lead to any form of prohibited conduct.**

**For people who wish to create reports on Power BI, training is available online through video tutorials on Lynda.com (which is committed to Section 508 accessibility, a set of guidelines described in a US Federal law). Lynda.com is available to all University Staff and Students. Microsoft also offers its own online learning guide for Power BI free of charge (<https://docs.microsoft.com/en-us/power-bi/guided-learning/index>).**

**Additionally, we plan to develop University-specific tutorial documents, which will be printable, and could be made available as a Word document upon request. The University-specific manual will be uploaded to the University website, which adheres to the University Web Accessibility Policy based around the Web Content Accessibility Guidelines AA standard. We also plan to include guidelines for how to create accessible reports in Power BI in the University tutorial manual. Again, alternative formats will be provided upon request.**

**Overall, we have and will continue to strive to ensure that the system is as accessible as possible. Where we are unable to resolve an issue, we will make reasonable adjustments to ensure no disadvantage. For example, the University could provide one-to-one in-person assistance for users creating reports on Power BI, or additional assistive technology more broadly for those who wish to view reports.**

- If the policy/practice contributes to advancing equality of opportunity<sup>2</sup>  
**Power BI is available 24 hours a day, 7 days a week via the web, from anywhere around the world. As such, the service will allow users with schedules that do not align with "regular" work hours of 9am-5pm GMT (whether due to pregnancy/maternity/caring responsibilities—and therefore sex—, disability, religious practice, or the fact that they are in a different time zone) to enjoy ease of access.**

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<sup>2</sup> This question does not apply to the protected characteristic of marriage or civil partnership

Furthermore, only people with authorized access could view certain data. For example, reports created from student data related to protected characteristics stored by Student Services (and used for reports such as those that analyse the diversity of the student body) are only available to a limited audience. Generally, the data that is available to users is limited by University regulations on data protection, and all University employees must undergo data protection training. This practice mitigates any privacy concerns that may arise.

Recent updates made to Power BI in September 2017 have made the interface even more user-friendly. The improved aesthetics makes it easier for all users (including disabled users) to navigate and utilise the platform. The most recent version of Power BI has been tested for accessibility by the Information Services Disability Information Officer.

- If there is an opportunity in applying this policy/practice to foster good relations: We hope that the use of Power BI, which facilitates data organization and analysis, will enable more informed decision-making across the University. As a result, this will allow departments to deliver better customer service, and positively impact all parties involved in the University, including current students and staff as well as future applicants/candidates. Further, the use of Power BI may enhance the University's commitment to equality and diversity issues by assisting in the development of diversity initiatives in areas such as recruitment. University divisions looking to hire new members of staff could leverage Power BI to create reports on the composition of the current workforce to assess which groups are underrepresented. Finally, we hope that the consideration shown to any potential impacts on any of the 9 protected characteristics as part of this project helps to demonstrate Information Services and the University's commitment to equality and diversity.

- If the policy/practice create any barriers for any other groups? This policy should not create any barriers for any other groups, as it is simply a tool for data analytics. All staff have access to free IT facilities 24 hours a day, which they could use to access Power BI.

- How the communication of the policy/practice is made accessible to all groups, if relevant?

For people who wish to create reports on Power BI, training is available online through video tutorials on Lynda.com (which is committed to Section 508 accessibility, a set of guidelines described in a US Federal law). Lynda.com is available to all University Staff and Students. Microsoft also offers its own online learning guide for Power BI free of charge (<https://docs.microsoft.com/en-us/power-bi/guided-learning/index>).

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- How equality groups or communities are involved in the development, review and/or monitoring of the policy or practice?

The Information Services Disability Information Officer has conducted an accessibility assessment on Power BI. We will continue to monitor feedback and complaints for any positive or negative feedback. Users can submit any feedback via Unidesk, which the Service Manager for Power BI will respond to directly. We plan to do another accessibility test if the system is changed significantly.

- Any potential or actual impact of applying the policy or practice, with regard to the need to eliminate discrimination, advance equality and promote good relations:

**Nothing further to what has been stated above.**

#### F. Equality Impact Assessment Outcome

Select one of the four options below to indicate how the development/review of the policy/practice will be progressed and state the rationale for the decision

**Option 1: No change required – the assessment is that the policy/practice is/will be robust.**

**Based on the reasons stated above.**

~~**Option 2:** Adjust the policy or practice—this involves taking steps to remove any barriers, to better advance equality and/or to foster good relations.~~

~~**Option 3:** Continue the policy or practice despite the potential for adverse impact, and which can be mitigated/or justified~~

~~**Option 4:** Stop the policy or practice as there are adverse effects cannot be prevented/mitigated/or justified.~~

#### G. Action and Monitoring

1. Specify the actions required for implementing findings of this EqIA and how the policy or practice will be monitored in relation to its equality impact (or note where this is specified above).

**We will continue to review feedback/comments related to any of the 9 protected characteristics. We will also advise staff of the need to make reasonable adjustments where appropriate. Finally, we are committed to providing alternative formats upon request.**

2. When will the policy/practice next be reviewed?

**If there is a significant change (i.e. a software upgrade) or we receive any positive or negative feedback related to any 9 of the protected characteristics.**

#### H. Publication of EqIA

Can this EqIA be published in full, now? **Yes/No**

If No – please specify when it may be published or indicate restrictions that apply:

#### I. Sign-off

EqIA undertaken by (name(s) and job title(s)): **Anne Major (Service Manager (Reporting and Analytics), Applications Division, Information Services)**

Accepted by (name): **Susan Cooke, Enterprise Data Services Team Manager, Service Management, Applications Directorate, Information Services Group**

[This will normally be the person responsible for the policy/practice named above. If not, specify job-title/role.]

Date: **28<sup>th</sup> June 2018**

Retain a copy of this form for your own records and send a copy to [equalitydiversity@ed.ac.uk](mailto:equalitydiversity@ed.ac.uk)