



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

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.

<p>A. Policy/Practice (name or brief description): Development and Alumni Charity Customer Relationship Management System (Charity CRM) Procurement Accessed by staff to manage University alumni, donor and supporter data; to manage relationships and financial transactions. Alumni will have access through Single Sign On to a website to self-service updates and donors/the public will be able to securely donate on the University's website.</p>
<p>B. Reason for Equality Impact Assessment (Mark yes against the applicable reason):</p> <ul style="list-style-type: none">• Proposed new policy/practice• Proposed change to an existing policy/practice YES• Undertaking a review of an existing policy/practice• Other (please state):
<p>C. Person responsible for the policy area or practice:</p> <p>Name: Jenny Shaw</p> <p>Job title: Head of Business Enhancement</p> <p>School/service/unit: Development and Alumni, University Secretary's Group</p>
<p>D. An Impact Assessment should be carried out if any of the following apply to the policy/practice, if it:</p> <ul style="list-style-type: none">• 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
<p>E. Equality Groups</p> <p>To which equality groups is the policy/practice relevant and why? (add notes against the following applicable equality group/s)</p> <ul style="list-style-type: none">• Age• Disability• race (including ethnicity and nationality)

- religion or belief
- sex
- sexual orientation
- gender reassignment
- pregnancy and maternity
- marriage or civil partnership¹

This software system will be available to all Development and Alumni Staff, and other staff who require access to the CRM, and includes options where members of the public can donate and alumni can update their contact information – it therefore has the potential to impact on all nine protected characteristics. No-one has access to any information other than their own (limited to contact, employment, communication preferences and degree information) apart from staff operating the system as part of their role; for which they have appropriate training.

Age – Date of birth is held on the system from the student import once they have completed their studies. This is used for reporting purposes and to analyse and segment data for communications that help inform business decisions about how or whether we approach certain groups of alumni/donors, based on the past performance of communications. Confidentiality is maintained through technical and organisational measures.

Disability – The CRM and related systems must be compatible as far as possible with the Web Content Accessibility Guidelines 2.1. AA standard including compatibility with assistive technology. There will be a need to consider reasonable adjustments for any disabled users (staff or other) who for whatever reason are unable to use online system and we are unable to rectify this. The CRM system has been tested for accessibility in line with compliance within the Web content Accessibility Guidelines 2,1 AA standards. A number of improvements regarding accessibility have been made and where these are under the Universities control we are doing what we can to resolve these and where these are outwith the control of the University and in the hands of the supplier we are working with them to encourage them to make these improvements. An accessibility statement in line with The Public Sector Bodies (Websites and Mobile Applications) (No. 2) Accessibility Regulations 2018 has been added. (As part of the procurement process all tenders were evaluated for accessibility and scored on their performance). **The donation and alumni self-service websites and calling application will require separate accessibility testing if they are not developed in EdWeb and will require separate accessibility statements.**

Race – The system is only provided in English but as this is the main teaching language of the University we do not believe this would leave to any disadvantage. Where any restrictions in a country, such as China or Russia, prevents access to the public facing websites, we can provide alternative methods for donating or updating alumni information. Nationality, where known, is visible to staff, but this is not publicly presented anywhere at any time. We use nationality to help us identify a diverse range of potential alumni volunteers to get involved in activities which aim to enhance the student and alumni experience, strengthen student employability, aid student recruitment and support the University's commitment to widening participation. Activities include mentoring, event speakers, regional alumni ambassadors, and answering student specific questions. Similarly we use nationality to identify alumni to potentially support student scholarships specific to a region.

¹ 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.

Religion or belief - Alumni and donors are not asked for details of religion. Donors have a choice as to which priority project they give to. Only enough detail to process a donation is requested and what their future communication preferences are. Where posed photos are taken at events or for publication as part of an alumni profile, for example, these are only published with the consent of the individual.

Sex – Title is requested so that individuals can be addressed appropriately in correspondence. The system has a gender neutral option. A title needs to be added but it is possible to give a gender neutral option.

Sexual orientation – Do not record sexual orientation.

Gender reassignment – If a person was undergoing the process of gender transformation they would be able to contact the office to ensure their details were updated as appropriate throughout the process.

Pregnancy and Maternity – No next of kin recorded. Basic family details may be recorded for a small number of major gift prospects for internal knowledge and relationship management.

Marriage and Civil Partnership – Do not record marital status, however, if someone gives the title Mrs we can derive that they are married/or have been married. We record previous names to be able to help identify the correct individual if they contact us to update their information. Basic family details may be recorded for a small number of major gift prospects for internal knowledge and relationship management.

Add notes against the following applicable statements:

- On any available information about the needs of relevant equality groups:

We have consulted with the Information Services Disability Information Team and they have conducted an accessibility audit of the software in line with the Web Content Accessibility Guidelines 2.1 AA standard including computability with assistive technology. Suggestions have been made for improvements and work is ongoing with the suppliers to implement this. We also consulted with Development and Alumni department, Legal Services, Procurement and Information Services. We monitor all feedback for comments positive or negative related to any of the nine protected characteristics. Business drivers relating to current system reaching its end of life and technical improvements to enable us to better meet our long term objectives for the University were the main reasons for requesting this new system.

- Any gaps in evidence/insufficient information to properly assess the policy, and how this be will be addressed:

At this stage we feel we have sufficient evidence to proceed.

- 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 this will result in any form of prohibited conduct for the reasons stated above and below. If a disabled staff member was unable to use the system or a user was unable to use the donate website or alumni self-service updates and we were unable to rectify this, reasonable adjustments would be put in place e.g. provision of information in alternative formats or alternative ways to do this, such as over the phone etc.

- If the policy/practice contributes to advancing equality of opportunity²
We believe this new system will advance equality of opportunity as it is fully mobile responsive allowing users greater flexibility regarding when and where they use the application which may have a positive impact on the protected characteristics of religion (in terms of observing times of religious observance) and those with parental and caring responsibilities. The system is also more accessible than previous systems so we would hope we would see increased usage by disabled users.

- If there is an opportunity in applying this policy/practice to foster good relations:
By creating a more accessible system and one flexible system which it is hoped will increase participation, it is anticipated that this may help foster good relations. Also It is hoped that by showing we have considered any potential positive or negative impacts on any of the nine protected characteristics this demonstrates the commitment the University has to Equality and Diversity.

- If the policy/practice create any barriers for any other groups?
It is not anticipated that this should create any barriers. For those on low incomes, staff are provided with free 24/7 IT facilities. In the UK, libraries offer free internet access and similar arrangements exist in other countries.

- How the communication of the policy/practice is made accessible to all groups, if relevant?
All current staff with access will be appropriately trained with all communications offered in alternative formats free of charge upon request to disabled users. For users of the donate website or alumni self-service updates, communications will be offered in alternative formats free of charge upon request to disabled users.

- How equality groups or communities are involved in the development, review and/or monitoring of the policy or practice?
We will monitor all feedback for any comments positive or negative related to any of the nine protected characteristics and act accordingly. This will be regularly reviewed and acted on through our single point of contact for all users.

- 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 other than that 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.

For the reasons stated above and below.

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 remind staff of the need to make reasonable adjustments for disabled user and to provide information in alternative formats**

² This question does not apply to the protected characteristic of marriage or civil partnership

- **We will monitor all feedback for any comments positive or negative related to any of the nine protected characteristics and act accordingly.**
2. When will the policy/practice next be reviewed? **When there is any significant change to the system or when we receive any positive or negative feedback related to any of the nine protected characteristics.**

H. Publication of EqIA

Can this EqIA be published in full, now? **Yes**

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)): **Jennifer Shaw, Head of Business Enhancement, Development and Alumni, Universities Secretary's Group**

Accepted by (name): **Kate Brook, Director of Services, Development and Alumni, Universities Secretary's Group**

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

Date: 01/09/2021

Retain a copy of this form for your own records and send a copy to equalitydiversity@ed.ac.uk