



THE UNIVERSITY *of* EDINBURGH

# Equality Impact Assessment Template

If you require this template in an alternative format, such as large print or a coloured background please contact [HRHelpline@ed.ac.uk](mailto:HRHelpline@ed.ac.uk).

You'll find it useful, before filling in this assessment template, to complete the online course:

[Introducing Equality Impact Assessment](#)

This template is designed to be used alongside the:

EqIA [Guidance and Checklist](#)

EqIA [Policy Statement](#)

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

A. Key Information	
<b>Policy/practice name:</b>	Development and Alumni Charity Customer Relationship Management system (Charity CRM) re-contracting to extend existing contract.
<b>General background/aims of policy/practice:</b>	Accessed by staff when necessary as part of their roles who are required to manage University alumni, donor and supporter data or General Council members; to communicate appropriately with this community; to manage relationships and philanthropic donations. Alumni will be able to use their secure University login to access the alumni portal to self-service updates and donors/the public will be able to securely donate on the University's website, both of which use the system API to update information directly back to Charity CRM.
<b>School/Dept:</b>	Development and Alumni
<b>Assessed by:</b> (name & job title)	Jenny Shaw, Head of Business Enhancement, Development and Alumni
<b>Sign off by:</b> (name & job title)	Kate Brook, Director of Advancement Operations, Development and Alumni
<b>Sign off date:</b>	02/12/2024
<b>Review date:</b>	01/05/2030

<b>B. Reason for EqIA</b>	(check one)
<b>New policy/ practice is proposed</b>	<input type="checkbox"/>
<b>Change to existing policy/practice is proposed</b>	<input checked="" type="checkbox"/>
<b>Other</b> (describe in Section D below)	<input type="checkbox"/>

### **C. Who will most impacted by this proposal?**

Consider carefully how your proposal will impact both positively and negatively on people from different groups.

Consider the 9 protected characteristics as below in your proposal. There may be other identity characteristics that you wish to also include in your impact assessment. It is expected that you will consider all equality groups for impact. Please indicate below (with a tick) which groups you feel will be most affected by your proposal.

<b>Age</b>	<input checked="" type="checkbox"/>	<b>Race (including ethnicity and nationality)</b>	<input checked="" type="checkbox"/>	<b>Marriage and civil partnership<sup>1</sup></b>	<input checked="" type="checkbox"/>
<b>Disability</b>	<input checked="" type="checkbox"/>	<b>Religion or belief (including no religion or belief)</b>	<input checked="" type="checkbox"/>	<b>Sex</b>	<input checked="" type="checkbox"/>
<b>Gender reassignment</b>	<input checked="" type="checkbox"/>	<b>Pregnancy and maternity</b>	<input checked="" type="checkbox"/>	<b>Sexual orientation</b>	<input type="checkbox"/>
<b>Other characteristics</b>	<input type="checkbox"/>				

### **D. Consideration of Impact**

Show your considerations of how all of the above protected characteristics may be impacted. The following prompts will help you to reflect:

- What information and evidence do I have about the needs of relevant equality groups – is this sufficient to fully assess impact?
- Could this policy/practice lead to discrimination (direct or indirect), harassment, victimisation, or create barriers or less favourable treatment for particular groups and how can you mitigate any negative impacts?

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

- Does this policy/practice contribute to advancing equality of opportunity and fostering good relations?
- How can communication of the policy/practice be made accessible to all relevant groups?

This information has been reviewed and updated from the previous EqIA completed in 2022. This software system will be available to all Development and Alumni staff, and other staff who require access to Charity 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 alumni 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 and role-based permissions applied in the system.

- **What information is available about the needs of relevant characteristics – is there sufficient information and evidence to fully assess impact?**

Age – Date of birth is held on the system from the student import once alumni 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 – Charity 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 systems and we are unable to rectify this. Charity CRM system was tested in 2022 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 University's control we are doing what we can to resolve these. 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 original procurement process all tenders were evaluated for accessibility and scored on their performance). The donation website and alumni self-service website have separate accessibility statements completed in 2022.

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.

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.

- **Would this policy/practice lead to discrimination, harassment, victimisation, or create barriers or less favourable treatment for particular characteristics, and how can you mitigate any negative impacts?**

We do not believe this system 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.

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.

- **Does this policy/practice contribute to advancing equality of opportunity and fostering good relations?**

We believe this 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.

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.

- **How will communication of the policy/practice be made accessible to all relevant groups?**

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.

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.

<b>E. Equality Impact Assessment Outcome</b> 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.	(check one)
<b>Outcome 1:</b> No change required – the assessment is that the policy/practice is/will be robust.	<input checked="" type="checkbox"/>

<b>Outcome 2:</b> Adjust the policy or practice – this involves taking steps to remove any barriers, to better advance equality and/or to foster good relations.	<input type="checkbox"/>
<b>Outcome 3:</b> Continue the policy or practice despite the potential for adverse impact, and which can be justified.	<input type="checkbox"/>
<b>Outcome 4:</b> Stop the policy or practice as there are adverse effects which cannot be prevented/mitigated/or justified.	<input type="checkbox"/>

#### **F. Action and Monitoring**

Describe any actions you will take to address the findings of this EqIA.

- How can I involve equality groups or communities in the ongoing monitoring, review and potential future development, of this policy/practice?

Describe how the policy/practice will be monitored going forward, to ensure that impact is frequently reviewed. Make sure you add a review date in Section A above.

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.

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

#### **G. Publish**

Send your completed EqIA to the HR EDI team ([equalitydiversity@ed.ac.uk](mailto:equalitydiversity@ed.ac.uk)) to published, and keep a copy for your own records.