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.

A. Policy/Practice (name or brief description): **Email/Microsoft 365 display name ordering change**

The proposed change to the ordering and format of display names for Microsoft 365 will change the current format for display names. The user's forename will now be placed in front of their surname and their surname will no longer be in all capitals (SURNAME Forename to Forename Surname).

The change has been proposed as part of the Information Service Group's (ISG) objective to make processes and systems more user friendly. The decision to use the previous format of SURNAME Forename was made when the main use of the display name in Microsoft 365 was to lookup the address book. However, expansion of other Microsoft platforms (i.e., Teams and SharePoint) has made this format counterproductive and users have been requesting this change in their feedback to ISG. Based on this the relevant Change Advisory Board recommended that this change be implemented and this recommendation was approved by the IT Committee.

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

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

C. Person responsible for the policy area or practice:

Name: **Alex Carter**

Job title: **Head of Service Management**

School/service/unit: **Service Management, Information Services Group (ISG)**

D. An Impact Assessment should be carried out if any if 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[1]

The proposed change to the order of user's display names in Microsoft 365 has the potential to impact on all 9 protected characteristics as all staff and students throughout the University have access to Microsoft 365 as a University IT system. The change will be applied to the display names of all users. Users will also see other user's display names as the Forename Surname format when using any of the Microsoft platform (for example, the address book, Teams, SharePoint, Outlook, etc). We feel, however, that the characteristics of disability and race will be the most likely to be affected.

The change to display name order may be of particular relevance to the protected characteristic of race (including ethnicity and nationality). As in some countries and cultures the naming convention is for the surname to come before the forename. This includes East Asian cultures and countries (for example, China, Japan, South Korea, North Korea, Cambodia, and Vietnam) and in some instances European cultures and countries (for example, Hungary). This change has the potential to be a disadvantage to users where the cultural norm is surname/forename It may also be a disadvantage to users from countries such as Korea and some Indian cultures, where the naming convention is for people to have 3 names. This change will bring the display in line with all other University systems so no additional disadvantage will be experienced.

The change to display name order may also be of relevance to the protected characteristic of disability. Some neurodiverse individuals may need more time to adjust to the new order of the display names. This is mitigated by the ability to search based on Surname or Forename in most places where name based searches are possible.

The change may be particularly relevant to the protected characteristic of disability in other explicit terms, including because it is a policy relating to an online platform (Microsoft Outlook). This change makes no functional changes to Microsoft Outlook) so the accessibility of outlook per say is not included in this EqIA. Although we look to ensure all our online systems are as accessible as possible in line with Wed Content Accessibility Guidelines Version (WCAG) 2.1 AA standard, including compatibility with assistive technology. The University has a web accessibility policy, which is based on the WCAG 2.1 AA standard. Reasonable adjustments will be in place should a disabled user prove unable to use the system, and that we were unable to rectify.

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[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.

The University vision involves a continuing commitment to equality, diversity and inclusion for both students and staff. The University has a single [Equality Strategy](#) to ensure that equality, diversity and inclusion are guiding principles in our pursuit of academic excellence.

Add notes against the following applicable statements:

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

College Computing Professional Advisory Groups (CPAGs) are being informed of the change and asked for their feedback. Staff and students will be able to provide feedback on the change to the feature through the usual ISG channel, by contacting IS Helpline. If we receive feedback, we will capture and monitor it for any positive or negative information related to the nine protected characteristics. The Staff Disability Network, the Disability Information Team, the Student Disability service, the EUSA student disability rep, Trade Unions and Chaplaincy have been consulted and their feedback included in the change and reflected in this document We received no concerns from any of the groups listed other than from the Student Disability Service, Staff Disability Network and EUSA disability office who although largely in favour of the change asked that we ensure communications were sent out in a timely fashion and accessible for neurodiverse students and that at the same time we could remove the use of continuous capitals. Both of these comments were acted on."

- 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 information 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 that this change will lead to any form of prohibited conduct for the reasons detailed above and below. Where necessary reasonable adjustments will be put in place

- If the policy/practice contributes to advancing equality of opportunity[2]

The change to the ordering (and capitalisation) of names in Microsoft 365 to Forename Surname can advance equality of opportunity by making the platforms more user friendly. The change should improve the readability of names on all Microsoft platforms. It will also bring the Microsoft 365 platforms into line with normal practice elsewhere in the University. The change to remove capitalisation was requested by several disabled users so we hope this will enhance the accessibility of our naming conventions.

- If there is an opportunity in applying this policy/practice to foster good relations:

It is hoped that by considering impacts, positive and negative, on all the protected characteristics via the change, and subsequently this EqIA, we are showing that the University is committed to equality, diversity, and inclusion. We have considered ways

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

to mitigate and provide support and information to all users taking into consideration any specific needs tor elated to any of the nine protected characteristics

- If the policy/practice create any barriers for any other groups?

We do not feel this policy/practice will create barriers for any other groups.

In order to access the email service, users require access to the internet. This could include a desktop computer, mobile device or tablet. Staff and students have free, 24 / 7 IT facilities at the University, principally at the George Square Main Library. IT facilities are also provided at other campuses across Edinburgh. Public libraries in the UK facilitate free access to the internet, too, whereas other countries have similar options available. Each staff and student is given a free Microsoft Outlook email account at no cost.

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

When the College Computing Professional Advisory Groups (CPAGs) have been informed of the change, there will be an information campaign on the change. Communications will go out to all users at the University informing them about the change.

We will also add information about the change to the University of Edinburgh website on the dedicated Office 365 webpage. This page can be found here: <u>Office 365 University of Edinburgh Page</u> .
This website has been accessibility tested in line with the Web content Accessibility Guidelines 2.1 AA standard and an accessibility statement added in line with the Public Sector Bodies (Websites and Mobile Applications) (No. 2) Accessibility Regulations 2018

Information will be provided in alternative formats free of charge upon request,

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

All feedback from equality groups or communities will be monitored for any positive or negative impact on any of the 9 protected characteristics and acted on accordingly. If we receive feedback related to a specific protected characteristic we will consult with the relevant groups we consulted with initially for input and update this EqIA accordingly/

- 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 than what is mentioned above and below.

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.

This decision is based on the information provided above and below.

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).

All feedback will be monitored for any potential positive or negative impacts on any of the 9 protected characteristics, and consider any user requests or suggestions for reasonable adjustments in this field. All information will be available in alternative formats upon request

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

The policy will be reviewed whenever there is another significant change to the ordering of names in Microsoft 365. Moreover, a review will occur should we receive any positive or negative feedback related to any of the 9 protected characteristics. On each of these occasions, the EqIA will be updated.

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)): **Eilidh Macleod, Messaging Services Assistant, Service Management, Applications Directorate, Information Services Group**

Accepted by (name):
Alex Carter, Head of Service Management, Applications Directorate, Information Services Group

Date: **06th July 2022**

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