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.

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	
Policy/practice name:	Research impact tracking and management for REF 2029
General background/aims of policy/practice:	The SharePoint solution being developed, and associated business processes, will enable secure storage of evidence records relevant for REF 2029 reporting. This will involve records being copied from Pure into SharePoint, where, authorised resource will be able to access the records, relevant to their role. The solution will deliver a central location for the secure storage of evidence records, instead of individuals storing information locally. This will help to ensure consistency in approach across all Schools and Colleges and will enable better access to records, reducing duplication of effort.
School/Dept:	Library Research Support
Assessed by: (name & job title)	Ailsa Glass, Project Manager, Applications, Information Services Group
Sign off by: (name & job title)	Research Information Systems Manager, Library Research Support, Information Services Group
Sign off date:	10/10/2024
Review date:	10/10/2025

B. Reason for EqIA	(check one)
New policy/ practice is proposed	☐
Change to existing policy/practice is proposed	☒
Other (describe in Section D below)	☐

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.

Age	☐	**Race (including ethnicity and nationality)**	☐	**Marriage and civil partnership[1]**	☐
Disability	☐	**Religion or belief (including no religion or belief)**	☐	**Sex**	☐
Gender reassignment	☐	**Pregnancy and maternity**	☐	**Sexual orientation**	☐
Other characteristics	☐				

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?

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[1] 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.

This change in approach and process will impact all people that access evidence records for REF 2029 reporting equally. There is no particular characteristic that will be impacted more than any other.

The SharePoint solution will be accessibility tested to ensure that it is as accessible as possible to all users.

Users have had the opportunity to test the solution and to provide feedback that has shaped both the functionality and usability of the solution.

The new solution will be communicated to users once the processes and procedures are in place, with the first reporting using data from this solution expected in January 2025.

E. 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.	(check one)
Outcome 1: No change required – the assessment is that the policy/practice is/will be robust.	☒
Outcome 2: Adjust the policy or practice – this involves taking steps to remove any barriers, to better advance equality and/or to foster good relations.	☐
Outcome 3: Continue the policy or practice despite the potential for adverse impact, and which can be justified.	☐
Outcome 4: Stop the policy or practice as there are adverse effects which cannot be prevented/mitigated/or justified.	☐

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.

Once the solution and associated processes are in place, the effectiveness will be monitored and feedback captured. There will be the opportunity through continuous improvement to enhance the solution and the processes.

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.