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:	HubSpot CRM Tool
General background/aims of policy/practice:	Use HubSpot as a press contacts organiser and email tracker (with Outlook email integration). Journalists' email addresses and contact history will be stored online in HubSpot. The data will be able to be accessed with email address EUSA Press Contact <press@eusa.ed.ac.uk> and strong password, securely stored in My LastPast Vault. Only approved and trained members of the Marketing and Communications team will have access to the login. Circa three colleagues will use the system, which is a popular and widely used CRM software from the wellknown brand, HubSpot. HubSpot CRM tracker follows GDPR policy, as outlined here: https://www.hubspot.com/data-privacy/gdpr https://legal.hubspot.com/privacy-policy
School/Dept:	Marketing & Communications, Edinburgh University Students' Association
Assessed by: (name & job title)	Amelia Stokes, Internal Communications and PR Manager
Sign off by: (name & job title)	Emma Robertson-Werner, Director of Marketing and Communications
Sign off date:	29.04.2025
Review date:	29.04.2026

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?

- 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?

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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 policy does not affect protected characteristics. The only barrier would be for internal staff learning to use the new software. To address this, we will offer training and feedback sessions.

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.

Staff using the software will have the opportunity to complete training and give feedback with their line manager.

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.