



## 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](http://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):** **Provision of user support for Finance**

**B. Reason for Equality Impact Assessment (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: **Lee Hamill**

Job title: **Programme Sponsor**

School/service/unit: **Finance Transformation**

**D. An Impact Assessment should be carried out if any of the following apply to the policy/practice, if it:**

- affects primary or high level functions of the University **NO**
- 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**

**The current practice for end users requiring help and assistance from the finance department is to select the appropriate contact from a long list of possible contacts on the website.**

**The planned change in practice will result in end users having one contact point for their queries, the University Helpdesk. This First Line Support will assist the users with basic queries and pass on more complex queries to the relevant second line support team. There will be an increase in the number of self-help materials available online, so that end users may be able to resolve their queries on their own. This service is available to all University of Edinburgh staff and students, as well as external suppliers and customers.**

## 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<sup>1</sup>

**This service applies to all staff, students, external suppliers and external customers who need to obtain finance related help and support, and therefore has the potential to affect all protected characteristics. However, we feel the characteristics most likely to have the potential to be impacted on are Disability and Race. There may also be a potential benefit for those with caring/parental responsibilities given the increase in service times. All Information Services helpline staff are encouraged to undertake the Universities' online Equality and Diversity training and attend the specific Disability Awareness Training. They are also provided with an A5 card with bullet points on assisting disabled users which was created in partnership between Information Services and the Student Disability Service.**

Add notes against the following applicable statements:

- On any available information about the needs of relevant equality groups:  
**-Disabled users will require the online advice to be accessible in terms of the web content accessibility guidelines version 2 AA standard and compatible with assistive technology. Users can also email or phone for advice. At present the helpline does not offer minicom/textphone facilities but this will be looked into if feedback indicates this is required in addition to the email facility. Reasonable adjustments such as the providing of the online guidance in alternative formats will be provided upon request.**
- Race – the system is only able to offer advice by email and phone in English, and the online guidance is provided in English but users can use their browser settings to translate the content. We do not believe this will result in any significant disadvantage but we will continue to monitor this on an ongoing basis.**
- Pregnancy and maternity and religion/belief - this improved service will mean that users can access a greater range of online self-help materials which may have benefits for those with caring or parental responsibilities or those who observe religious practices at specific times.**
- 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.**

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<sup>1</sup> 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.

- 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 policy will result in any form of prohibited conduct. To ensure this does not occur reasonable adjustments for disabled users will be made where appropriate such as additional assistance to seek help. As mentioned above the system is only able to offer advice by e-mail and phone in English and the online guidance is provided in English but users can use their browser settings to translate the content. We do not believe this will result in any significant disadvantage but we will continue to monitor this on an ongoing basis.**

- If the policy/practice contributes to advancing equality of opportunity<sup>2</sup>

**By ensuring that self-help materials are available for users of all abilities, the practice will continue to promote equality of opportunity and by creating a more accessible way of seeking assistance should enhance the experience of some disabled users. Also, given that the system is available over a greater period of time each day and at weekends (rather than just standard working hours and relying on a response from a specific person who may be on leave etc). The hours of operation of the helpline are <http://www.ed.ac.uk/information-services/help-consultancy/contact-helpline/is-helpline-operating-hours>. This may have benefits for those with caring or parental responsibilities and those on flexible working hours contracts as will increase the periods of time where users get help and should increase turnaround time.**

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

**By providing a single point of contact for users, and providing more self-help materials, it is hoped that the service will provide a clear and simple solution to any queries, fostering good relations within the University. The new system allows for a variety of ways of obtaining assistance – online, email, phone and so is easily accessible for e.g. disabled users and help is available over a greater period of time each day and at weekends (rather than just standard working hours and relying on a response from a specific person who may be on leave etc). The hours of operation of the helpline are <http://www.ed.ac.uk/information-services/help-consultancy/contact-helpline/is-helpline-operating-hours>**

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

**The practice should not create any significant barriers for any other groups other than already mentioned. Staff have free 24 hour access to computing facilities so will be able to access the online assistance at any time. The email and phone assistance is available during the following hours <http://www.ed.ac.uk/information-services/help-consultancy/contact-helpline/is-helpline-operating-hours>**

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

**Communication of the new practice will be made by e-mail, through newsletters and through promotion at SEP presentations. Advice is provided online and by email and phone providing users with a variety of means to make contact. The online guidance will be provided on the University of Edinburgh website. The content management system of this website has been extensively tested for accessibility and all content on the website should adhere to the Universities' Web Content Accessibility Policy. This policy is based on the Web Content Accessibility Guidelines Version 2 AA standards. Information will be provided in alternative formats free of charge on request as required by law.**

<sup>2</sup> This question does not apply to the protected characteristic of marriage or civil partnership

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

**A variety of users will be consulted during the development and review of the practice, and any issues raised will be taken into consideration.**

- 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:

**None 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. – **Based on the answers given above.**

~~**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).

- We will review feedback for any positive or negative feedback related to any of the nine protected characteristics
- Staff will be reminded of the need to make reasonable adjustments where required and the need to provide information in alternative formats upon request.
- Helpline staff as with all Information Services staff will continue to be offered and encouraged to take part in the Disability Awareness Training provided.

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

**The practice will next be reviewed if it changes again, or if there is any feedback positive or negative regarding 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)):

**Dawn Holmes, Senior Project and Programme Manager**

**Nichola Malcolm, Service Excellence Partner**

Accepted by (name): **Lee Hamill, Programme Sponsor**

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

Date: 19<sup>th</sup> April 2018

Retain a copy of this form for your own records and send a copy to

[equalitydiversity@ed.ac.uk](mailto:equalitydiversity@ed.ac.uk)