

## Equality Analysis

This form enables you to reflect on your proposed activity, and to assess the potential positive and negative impacts it might have on different members of the community. The Equality Analysis is designed to help you ensure your activities are meaningfully considered and not spending your time on an activity that will later need to be changed or disbanded due to not thinking about the practical needs of diverse communities who we are required to protect. If you have any questions about how to complete this Equality Analysis, please read the [Guidance](#) or contact the Equality, Diversity and Inclusivity Team: [edi@uwe.ac.uk](mailto:edi@uwe.ac.uk).

### **Activity Title: Casework Management Project**

**Project Manager and Contact: Lucy Cridland-Smith ([lucy.cridland-smith@uwe.ac.uk](mailto:lucy.cridland-smith@uwe.ac.uk))**

#### Proposed activity (change, refresh, policy, process or practice) being analysed

There is currently a gap in our UWE ecosystem for casework management capability that supports the delivery of a holistic risk-managed approach to student support. There are several ways in which a case is instigated – through UWE processes and procedures, students requesting support, support provided to specific students and incidents or other “crises.” Casework can be created by several teams including the disability service, student support advisors, the money service, the student casework team, the wellbeing team, success coaches, the accommodation service and security. Each team is currently using their own methods of recording this information, and a very manual process is used to consolidate the oversight of those students most at risk. This disparate way of working also makes it difficult for teams to work in a connected and a collaborative manner which would enable staff to respond quickly and effectively. The key risk we seek to address is the ability to have a single holistic way of seeing the totality of cases linked to an individual student, allowing that proactive and targeted support where most needed.

UWE has identified that Symplicity Advocate as our preferred supplier. Symplicity currently provide CareerHub which UWE renamed InfoHub which is used by the Infopoint and other teams to support core student journey activities. Following a reduced procurement process: requirements gathering and supplier responses; demonstrations of the software by both suppliers; and comparing pricing schedules.

This will provide opportunities for teams to look at new ways of working in more seamless ways across institutional ‘boundaries’, and staff will need to learn how to use the new technology and work with new administrative processes. There will be a new user interface/dashboard and all

teams that are involved in casework will be able to access the same information about students – to allow for a thorough understanding of what a particular student is dealing with and their risk profile.

Symplicity will work to the following phases:

1. Discovery and Planning phase, Symplicity consultants will map existing business processes and develop a product configuration plan that aligns deployment of Advocate for the university that provides the highest possible level of consistency with existing process. The process mapping exercise will provide the opportunity to assess current processes and to explore with key stakeholders (Student Money Service, Disability Service, Casework Team, Wellbeing Team, Student Support Advisors and the Accommodation Team) potential options to make improvement on these processes. Potential improvements may include the ability to achieve greater administrative efficiencies, improve end user experience for staff and students, and provide improved and actionable reporting and tracking data.
2. Building and Learning in Production, Symplicity will configure the solution based on the information gathered during the previous Discovery and Planning Phase. This will include the base configuration of all prioritised modules required for go-live and continue to build the technical integrations. Business users and end users of the system will complete online self-help training modules. These training modules and online resources provide guided information for the modules that have been prioritised for the go-live target. These online training modules will provide users with baseline knowledge and are to be completed as a prerequisite to the Training and Testing Sessions (via video link) conducted by the Implementation Manager in Phase 3. The training modules and online resources will be piloted with one team (Money Service) with five people, and if changes are needed the software can be amended then. Symplicity has 20 years' experience of working within the HE sector so is very developed.
3. Training and Testing to Go-Live, Phase 3 is focused on sharing this configuration and updated solution environment with university stakeholders and to refine this configuration in collaboration with end users (team members from the business teams). Phase 3 will involve several working sessions focused on driving user effectiveness and enablement towards go-live. The regular Training and Testing Sessions conducted by your Implementation Manager will build on the knowledge gained in the online training modules and will focus on university specific processes, configuration, and requirements.
4. Go-Live and Beyond, the final project phase is focused on final preparation for go-live and the following post go-live support.

Symplicity use a 'train the trainer' method where key staff are trained on how to use and update the system, following this training the key staff will be able to manage day-to-day operations independently and train other staff on how to use the Advocate system to support the delivery of their services.

What sources of information/ data, or who have you identified to help explore potential equalities impacts?

Senior stakeholders of the Project have been consulted with for this EA, including Esther Williams, Simon Phillips and Ian Stratton. Christian Scott, a Business Change Manager has also been consulted.

Assessing the activity from different perspectives

|   | <b>Possible Positive Impact on Groups</b><br>Include relevant data if possible   | <b>Possible Negative Impact on Groups</b><br>Include relevant data if possible | <b>Actions Required</b> | <b>Responsible Person</b> | <b>Target date</b> | <b>Success indicators</b> | <b>Progress to date</b> |
|---|--|--|-------------------------|---------------------------|--------------------|---------------------------|-------------------------|
| <b>All</b> (possible impacts affecting many groups) | A clear, uncluttered interface should allow staff to access casework in an easier way, thus enhancing their experience.<br><br>Staff will be able to see the totality of casework when advising students and can ensure that any required handover |  |                         |                           |                    |                           |                         |

|   |   |  |   |  |  |   |  |
|---|---|--|---|--|--|---|--|
|   | <p>between professional expertise is as seamless as possible.</p> <p>It will benefit students if they have multiple cases, they will not have to repeat themselves.</p> |  |   |  |  |   |  |
| <b>Age</b> (older people, younger people) |   | <p>Though all manner of people may find a change to access UWE services a challenge at first, older people and people who find comfort in working within a known environment may require support to adapt and adopt new technologies</p> | <p>Ensure communications around adoption to make the transition easy (i.e., information before, during and after the change)</p> <p>Ensure the new platform delivers enough value that the inconvenience of change is deemed acceptable. The value the new interface will bring</p> | <p>Project manager and senior user</p> | <p>TBC once implementation starts and we know timescales and when teams can undertake training</p> | <p>Completed training by staff affected</p> |  |

|  |  |  |  |  |  |  |  |
|--|--|--|--|--|--|--|--|
|  |  |  | <p>to students will be ascertained through usability testing sessions, where students can directly feedback on its benefit(s).</p> <p>The project Communication Plan will be key in ensuring staff are aware of the change coming and therefore confident to adopt the change. It will provide valuable information containing what to expect of the new platform, how to use it, where to seek help and how to feedback on it</p> |  |  |  |  |
|--|--|--|--|--|--|--|--|

|  |   |  |   |  |  |  |  |
|--|---|--|---|--|--|--|--|
|  |   |  | <p>to inform its development.</p> <p>Ensure that training is undertaken, and that staff feel comfortable with what they have learnt. We will have early adopters on hand to offer advice and support.</p> |  |  |  |  |
| <p><b>Disability,</b> including mental health and non-visible disabilities</p> | <p>The system will meet Web Content Accessibility Guidelines (WCAG) international standard to Level AA making it inclusive for neurodiverse staff and student to confidentially engage with it.</p> | <p>Though all manner of people may find a change to access UWE services a challenge at first, people who find comfort in working within a known environment, such as neurodiverse staff and students, may require support to adapt and</p> | <p>Ensure communications around adoption make the transition easy (i.e. information before, during and after the change)</p> <p>Ensure the new platform delivers enough value that</p>                    |  |  |  |  |

|  |   |                                |   |  |  |  |  |
|--|---|--------------------------------|---|--|--|--|--|
|  | <p>Advocate is fully browser-based and available from any location providing the user has privileges and access.</p> <p>The staff and student interfaces are fully mobile responsive and suitable for viewing on mobile, smartphone and tablet devices. It has been designed to adjust to the screen size, with tiles and menu options dynamically rearranging themselves to accommodate the device space.</p> <p>Furthermore, the interface can be switched to an accessibility mode with a straightforward switch mode.</p> | <p>adopt new technologies.</p> | <p>the inconvenience of change is deemed acceptable. The value the new interface will bring to students will be ascertained through usability testing sessions, where students can directly feedback on its benefit(s).</p> <p>The project Communication Plan will be key in ensuring staff and students are aware of the change coming and therefore confident to adopt the change. It will provide valuable information</p> |  |  |  |  |
|--|---|--------------------------------|---|--|--|--|--|

|                      |  |   |   |  |  |  |  |
|----------------------|--|---|---|--|--|--|--|
|                      | <p>All student interface functionality that can be used on a laptop or PC has been replicated for mobile and tablet usage, ensuring that students have access to everything they need regardless of the device they are using.</p> |   | <p>containing what to expect of the new platform, how to use it, where to seek help and how to feedback on it to inform its development. It is currently under development.</p> <p>Ensure that training is undertaken, and that staff feel comfortable with what they have learnt. We will have early adopters on hand to offer advice and support.</p> |  |  |  |  |
| <b>Women and men</b> |  | <p>Women tend to work part-time more than men for example due to be primary</p> | <p>Support and training will be scheduled on multiple days and</p>  |  |  |  |  |



|   |  |  |   |  |  |  |  |
|---|--|--|---|--|--|--|--|
|   |  | caregivers, and as such may have less time to engage in the training for a new system. | an online version will be available for individual access.  |  |  |  |  |
| <b>Trans and non-binary people, including gender reassignment</b> | Language within the system and related communications will be inclusive, for example using 'they' instead of 'he/she'.<br>This also provides a learning opportunity for those engaging the new system to understand the appropriate pronouns used when referring to those who are trans and/or non-binary. |  | Training on the new system for those away from the University will be part of their return-to-work induction. |  |  |  |  |
| <b>Marriage and/or civil partnership</b>                          | Language within the system and related communications will be inclusive.   |  |   |  |  |  |  |

|  |  |  |  |  |  |  |  |
|--|--|--|--|--|--|--|--|
| <p><b>Pregnancy and/or maternity,</b> including Adoption</p>                         | <p>Usual systems of work will remain the same, e.g., office/home office-based sitting at a desk using an IT system. These factors will have been part of an individual's personal safety plan if required.</p> | <p>If someone were to go on leave during this system update, they may feel they miss important training.</p> | <p>We will be using train the trainer, so when that person returns to work we need to ensure that team members are able to train the staff member.</p>                                 |  |  |  |  |
| <p><b>Race,</b> including ethnicity and citizenship</p>                              | <p>Language within the system and related communications will be inclusive.</p>  |  |  |  |  |  |  |
| <p><b>Religion and/or belief,</b> including those without religion and/or belief</p> |  | <p>Some reviews and activities may take place during religious holidays and/or festivals.</p>                | <p>To maximise engagement through planning (e.g., avoiding Friday lunchtime / afternoon meetings, and particularly avoiding meetings later in the day during Ramadan), support and</p> |  |  |  |  |

|   |  |  |  |  |  |  |  |
|---|--|--|--|--|--|--|--|
|   |  |  | training will be scheduled on multiple days and an online version will be made available for individual access.  |  |  |  |  |
| <b>Sexual orientation</b>                                   | Language within the system and related communications will be inclusive.   |  |  |  |  |  |  |
| <b>Other specific group</b> (e.g., International or Access) | Language within the system and related communications will be inclusive and use plain English will be promoted in all comms.<br><br>The language is being reviewed and Symplicity training manuals re-written, where applicable, to make them more user-friendly |  | Additional training/time will be offered to those where English may not be their first language and/or who may request additional support/access depending on their specific needs. An online version will also be |  |  |  |  |

|  |  |  |                                       |  |  |  |  |
|--|--|--|---------------------------------------|--|--|--|--|
|  | and to reflect the language used at UWE. |  | made available for individual access. |  |  |  |  |
|--|--|--|---------------------------------------|--|--|--|--|

### Project manager next steps

Does this Equality Analysis require consultation of 3 or 6 weeks ([chart to help you decide](#)):

3 weeks

Is further monitoring or engagement required? (In addition to the formal Equality Analysis consultation, e.g., with the Students' Union, Disability Services, relevant staff groups):

No

What measure / statistic / data will you use to check if the activity has had a positive, negative, or neutral outcome?

Students will be at the heart of the building of the new interface: through usability sessions, they will be able to feedback on the contents and design of the interface until it is delivered. Once live, feedback mechanisms will be in place to inform changes and enhancements to the platform, i.e., inform its roadmap. Staff will also be asked for feedback to measure the impact the platform used by students has on them. Support will be in place at time of change for both students and staff, which will provide us with a direct measure of success.

When will you review this Equality Analysis? Enter date or project stage suitable to the proposal:

Upon receiving feedback from the consultation. If none warrant a review, then when contents and designs are ascertained, i.e., when MVP is built but before going live, this document will be reviewed. Go live is currently scheduled between September 2023 and January 2024

### Equality, Diversity, and Inclusivity Team Review

The EDI Team has reviewed this Equality Analysis and is satisfied that it is ready for formal consultation

EDI representative: AJohnson

Date: 24.03.23

### Faculty/Service/Departmental Sign off

I am satisfied with the results from investigation, consultation, and analysis. The progression of this EA will continue to throughout the activity/project and I will ensure that a review is undertaken following the final implementation of the proposal, to assess its actual impact. Any actions or feedback that results as a consequence of ongoing project changes will be monitored and incorporated within the stated processes. Any negative outcomes will be resolved with the appropriate stakeholders identified.

Faculty Dean/ Head of Department/ Head of Service: Simon Philips (Deputy Director)

Faculty/ Department/ Service: SAS

Date: 22/03/23

### So what?

Consultation and engagement feedback is extremely important in Equality Analysis. Listening to student and staff voices and acting on their feedback mean that activities become fit for purpose for diverse student and staff communities. Complete the 'You Said, We Did' table **before and after formal consultation**, and throughout the remaining lifetime of your activity to show the impact of feedback on your activity. The Equality and Diversity Unit will be in touch to gather examples of this feedback to share with equality stakeholders. Please add additional rows to the table as required.

| You said | We did |
|----------|--------|
|          |        |
|          |        |
|          |        |

Please forward an electronic copy to the EDI Team by emailing [edi@uwe.ac.uk](mailto:edi@uwe.ac.uk)

**The original signed hard copy and/or electronic copy should be kept with your team for actions, review, and progression of Freedom of Information requests.**