Equality analysis form

If the activity you are planning to analyse is covered by an existing Equality Analysis or a relevant former Equality Impact Assessment, please use Section 2 of the form to highlight any updated information. The updated form should be sent through to the Equality and Diversity Unit for feedback, the start of the online consultation process and publication.

Section 1

Equality Analysis Screening

The following questions will identify whether a full Equality Analysis will be required. Please read the Equality Analysis guidance prior to completing the screening.

1. Name of the activity (strategy, policy, practice etc.)

> To implement a new Project Information and Management System (PIMS). This will be an institution- wide system for the approval and management of research and other externally funded projects across the whole of the project life-cycle and for capturing project information. The system encompasses research, CPD, KE and other externally funded projects, bidding, grants, research and KE data, people, organisations, outputs and impact.

2. Will this activity have the potential to deliver positive outcomes for students, staff and/or visitors from equality groups? Please provide evidence for your answer.

> Yes – by providing a single point of reference covering the full project life cycle from inception to closure it should increase the accuracy of data and result in more efficient working practices and higher quality reporting. This is an improvement on the current position.

3. Will this activity have the potential to create negative impacts on students, staff and/or visitors from equality groups? Please provide evidence for your answer.

> Yes – There is likely to be a change to some working processes which will need to be managed sensitively and there is also likely to be a period of minor disruption when the new system is implemented and users become familiar with it.

4. Does the activity have the potential to impact equality groups in the following ways:
   - Access to or participation in UWE Faculties or Professional Services?
   - Levels of representation across the UWE workforce?
   - Student experience, attainment or withdrawal?
   - Staff experience?

Please indicate YES or NO. If the answer is YES then a full analysis must be carried out. If the answer is NO, please provide a justification.

> Yes

Equality analysis screening sign off:

Faculty Dean or Head of Service	
Faculty / service	
Date	

Please return the completed form back to the Equality & Diversity Unit for feedback and publication

Section 2

Full Equality Analysis

1. Name of the activity (strategy, policy or practice etc.)

To implement a new Project Information and Management System (PIMS). This will be an institution- wide system for the approval and management of research and other externally funded projects across the whole of the project life-cycle and for capturing project information. The system encompasses research, CPD, KE and other externally funded projects, bidding, grants, research and KE data, people, organisations, outputs and impact.

2. What is the aim of the activity (objective or purpose)?

The new system aims to provide solutions for both researchers themselves as well as back-office staff administering research within the university. The new system will support organizational efficiency at UWE and provide a system for information on the University's research activity. It is intended that the information can be linked, viewed, exported and presented in several ways to assist researchers, administrators, managers and external bodies in accessing and assessing UWE's research activity. It will underpin many of the university's processes going forward. Many other competitor universities are already able to do this better than UWE.

3. If amending a current activity, what changes are proposed?

The system will replace the existing Project Approval Support System (PASS). UWE's PASS system provides specialist support for the research bid process supporting pre-award project approval, including costing functions. It will change certain processes currently conducted using other systems (mainly SharePoint)or paper based forms or email correspondence to all processes being carried out online by a single centralized system . It will also enable automated reporting of some reports currently produced manually.

4. Who is responsible for developing and delivering the activity?

A Project Board and Project team – final membership to be determined but will include project sponsor (Martin Boddy). There will be representation from finance, RBI, IT, and, procurement as well as the academic community.

5. What measures will be used to assess whether the activity is successful?

- Complete and accurate data held about projects to meet the university's needs as defined in the requirements document supporting the business case.
- Positive feedback from academics and administrative support functions.
- Easier access to management information etc. on bidding, bid success rates, funder by equalities categories etc.
- Take –up of new processes delivered by the system by academics and managers
- Faster reporting due to the removal of manual processes
- Robust and reliable technical support for the system.
- A benefits measurement document will be produced.
- Recording of all issues raised within the first 30 days of the system being live so that anything related to equality of access / use can be categorised and acted upon
- Ongoing recording and analysis of issues raised so that consideration can be given to improvements / enhancements on a rolling 6 monthly basis
- Capture of management information for Equality and Diversity

6. Does the activity have a potentially adverse impact on equality groups, in terms of employment issues and/or service delivery for students and/or staff? In the table below, please give evidence to support your yes or no answers. If the answer is not known, indicate how you will source evidence.

Meeting the public sector equality duty

Please also use the table below to demonstrate whether the activity has the potential to eliminate unlawful discrimination, advance equality of opportunity and foster good relations. Please use the 'no' column to highlight your responses.

	Yes	**No**	**Not known**
All Groups	The launch of the new system will mean that data relating to projects will all be held in one central repository. Data will be imported and exported to and from other systems such as Agresso and external sources including bibliometric and bibliographic data. This should result in a greater level of accuracy and consistency. As the system holds some personal data there will be staff concerns particularly from the academic		

	community about who can access this data. Strict limits and controls will need to be implemented. User roles / data visibility levels will be clearly defined as part of the project thus ensuring that only people who need to see or edit certain types of data will be able to do so. The type of role assigned to an individual will be clearly communicated and documented and where possible further detail on how the data is used by whom will be documented and provided to users of the system. There is potential for some staff to feel stress due to the process changes that will occur when the system is implemented.		
Women and men	It is intended that the system will be accessible remotely thus enabling greater flexibility for part time staff. This would be beneficial to women as 43% of UWE staff are part time with 70% of part time staff being female. UWE has Athena SWAN accreditation and is committed to retaining this.	There is no evidence that would suggest either of these groups will be less able to use the new system	
Trans people	A remotely accessible system will give users the option to carry out transactions at a time and location to suit them. This has potential to benefit this group if they are taking time away from work for medical appointments	There is no evidence that would suggest this group will be less able to use the new system	
Black and minority ethnic groups	It is possible that English will not be a first language for some users of the system. These staff may need additional support in		

	using the system. Careful consideration will be given to ensuring the quality of online help is high including full definition of unusual research terms etc. BME staff make up 7.6% of the workforce with 6.5% being a nationality where English is not the first language.		
Disabled people	People with visual impairments may have difficulty accessing web pages with assistive technologies if the pages do not meet specific standards for accessibility. Adherence to these standards will be part of the procurement process. Users with dyslexia may be impacted if inadequate contrast options are available and adherence to accessibility standards is not specified in the ITT. Users both with dyslexia and other cognitive disabilities which impact upon organisational ability or memory skills may have difficulties meeting on-line data and deadline requirements. People who have difficulty using devices such as a mouse or keyboard may experience problems accessing content where the content of the page requires fine motor control over small areas of the screen and therefore allowing the content size to be enlarged can influence their use of the content.		

	Users with disabilities are likely to benefit from the remote access aspect of the new system allowing them greater flexibility to work away from the office if required. 6.2% of UWE staff have a declared disability.		
Younger or older people	Research indicates that older people may be less familiar with IT and find changes to IT harder to adapt to. This could lead to higher levels of stress if enough training and support is not available during the introduction of the new system. 34% of UWE staff are aged 50 or older.		
People of different religion and beliefs	The remote access could benefit some people in this group who are taking time away from their base location for religious reasons e.g. Ramadan	There is no evidence that would suggest either of these groups will be less able to use the new system	
Lesbian, gay, bisexual people		There is no evidence that would suggest either of these groups will be less able to use the new system	
Marriage and civil partnership		There is no evidence that would suggest either of these groups will be less able to use the new system.	
Pregnancy and maternity	The remote access would enable staff on maternity leave to keep up to date with progress of certain projects if they wished.		

	Likewise staff who may need to work from home during pregnancy for medical reasons can continue to use the system		

7. Please give evidence of how you have engaged equality groups in the equality analysis process. Is further engagement required?

The scoping of the PIMS project has engaged with representatives from different faculties and services.

It is highly likely that there will be process / procedural changes as a result of implementing the new system. Managers will need to be fully aware of these changes so they can offer the appropriate level of support to staff who are impacted. Comprehensive training for staff who use the system will be undertaken to minimise the impact of any changes to process / procedure.

Implementation of the new system will be scheduled to avoid any key dates where possible e.g. if it is known that there is a significant Research Council submission date then we will avoid cutover close to this date. Before deployment the system will be tested on a small number of users including representatives from the disabled staff network, Martin Hoskins (Library services) will act as the co-ordinator for the disabled staff network. This will mean that any significant concerns can be identified and managed before the full release. A review will take place after implementation to ensure that any concerns are captured, and, where appropriate remedied as well as capturing lessons learnt for future projects.

Details of the project will be shared with the equality staff networks and the trade unions for their feedback, insights and suggestions. The project will continue to engage with staff networks throughout the project lifecycle to ensure that all equality considerations are current and valid.

Various users / staff groups will be engaged as part of the ongoing project. These staff will inform the design of the system and will support the testing phase to ensure that the system is accessible to key user communities.

8. What action can be taken to mitigate any potential negative impacts or address different needs? Please comment and then complete an action plan (see appendix 1).

There will be consultation and engagement with staff groups. Appropriate training will be provided to users and a support network will be put in place for a period of 1 month post implementation.

There will be a comprehensive project plan produced for the project detailing:

- Who signs off the requirements prior to procurement to ensure consideration has been given to the needs of all key users
- How the communication plan will be implemented to ensure ongoing engagement with a range of staff

- Who will be involved in the testing and when, testers will include representatives from the disabled staff network alongside staff from the academic community and the research support teams.
- How training will be delivered to meet the needs of all relevant groups

The system will be fully tested for accessibility and compatibility with assistive technology and tools with any issues being addressed pre cutover.

The procurement process will include a mandatory requirement for suppliers to meet UWE's accessibility standards.

Any changes in process will be fully assessed as part of the project. Managers will be briefed and additional training and support will be available for impacted staff as required.

Appropriate support will be put in place once the implementation is complete to ensure staff are supported in using the system during the "bedding in" period.

The project delivery will include updates on progress (as advised by the communications team) at regular intervals. Equality impacts will be discussed routinely at the project board.

9. Please indicate the level of equality relevance:
High ☐
Medium ✓
Low ☐

10. **Equality analysis sign off:**

Faculty Dean or Head of Service	
Faculty / service	
Date	

Please return this form to the Equality and Diversity Unit for feedback, the start of the consultation process and publication.

Equality analysis - action plan

Name of activity:

Plan completed by: Service / faculty:

Issues	Actions required	Responsible Person	Resources required	Target date	Success Indicators	What progress has been made?
Information/data required	Full and approved set of requirements detailing precisely what functionality is required from the new system			June 2017	Evidence of stakeholder meetings and workshops to capture requirements	Pre and Post award requirements well defined. Further work needed to complete finance and governance
Consultation	Consultation with equality staff networks throughout project lifecycle Full involvement of stakeholder group in testing the system before release to the wider user base.			Initial consultation June 2017 then ongoing Anticipated that testing will take place Autumn / Winter 2018	Evidence of meetings and feedback Evidence of feedback which is acted upon and signed-off by stakeholder groups	 Stakeholder engagement within academic community well established

Monitoring and review arrangements	Monitor impact of any changes on key staff groups		Input from various staff. Time required from each individual should not exceed 2 hours	3 months after implementation	Feedback from staff	
	Monitor and report against the benefits identified in the benefits plan to ensure they are realised			1 month, 3 months, 6 months and 1 year after implementation	Measurable benefits as detailed in benefits plan	
Publication	All significant project documents published on the project SharePoint site			Ongoing	Documents published on site regularly	SharePoint site established
Other actions						

Please return form to the Equality and Diversity Unit