

## Equality Impact 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 Impact Analysis, please read the [Guidance](#) or contact the Equality, Diversity and Inclusivity Team: [edi@uwe.ac.uk](mailto:edi@uwe.ac.uk).

**Activity Title: Student Enquiry Management**

**Project Manager and Contact: Lucy Cridland-Smith, Project Manager**

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

*Enter short description of what it is, the objectives and why you are doing it. If you are amending a current activity, what changes are proposed? Please outline the ways that students, staff, visitors or contractors might experience changes in their day to day lives e.g., changes to buildings, working hours, administrative processes.*

The University has procured a new enquiry / customer relationship management system, Salesforce, to launch initially as a replacement for InfoHub to support efficient customer service, enquiry management, in student facing teams within Student and Campus Life and Student Administration including InfoPoint and SPS teams. The project is phased to have functionality releases Phase 1 deliver a usable Student Enquiry Management MVP (Aug 2025), Phase 2 builds directly on the Phase 1 MVP and delivers the complete Student Enquiry Management service (June 2026). Phase 3 will then deliver functionality for Casework, Applicant and Disability work.

The initial go-live functionality Minimal Viable Product (MVP) i.e. the minimum we believed the platform should offer, so it delivers enough value to go live with, replaced the usage of a Live Chat product (Springshare) used by InfoPoint to support student enquiries which is surfaced on a small number of UWE.ac.uk webpages alongside launching an @uwe.ac.uk email address which brings specific emails into the Salesforce staff platform. Before an enquirer interacts with an agent, there will be an opportunity to engage with chatbot agent who can offer support using knowledge articles referencing UWE external facing web.

As Salesforce is deployed more widely in Phase 2, we anticipate to significantly enhance the student experience, especially for students

with **protected characteristics**. Phase 1 will have limited data put into the system and only be available to InfoPoint for discrete use, with the opportunity to expand to other teams.

#### AI workstream

One aspect of Phase 2 is to explore the opportunity for AI to support and potentially automate student enquiry management. The intention in this Phase is to build a staff-facing AI prototype with two use cases:

1. Enquiry summarisation – summarise the student’s enquiries and gain information to support processes, e.g. reasonable adjustments.
2. Internal knowledge agent - Summarise relevant content from the publicly available UWE web pages, plus Knowledge Articles (KAs) in Salesforce, in response to a query.

The second may be a step towards providing a student facing version to provide rapid self-help.

Phase 2 go live will look to introduce a student enquiry portal area accessed via MYUWE where students will be signposted for all enquiry routes they might have. They will be able to utilise knowledge articles to self-serve, ask a question by submitting an enquiry, book an appointment with professional services and see a dashboard / history of their previous interactions.

Professional services staff in Student and Campus Life Service and Student Administration will access these enquiries and appointments via Salesforce staff portal and manage enquiries via different queues. At the same time, we will look to remove or reduce team generic email address from the student and externally facing webpages, therefore reducing duplication and increasing visibility of queries across teams. This should lead to increased efficiencies and awareness across teams.

[What sources of information/ data, or who have you identified to help explore potential equalities impacts?](#)

*Examples include: External or Sector data/research, Staffing Statistics, Student or Staff Networks, specific stakeholders.*

Lucy Scott, Director Student and Campus Life and Sarah Garlick, Assistant Director Student and Campus Life.

As part of the enduring model for feedback and continuous improvement, we aim to gain student and staff insight on the student experience of the product as part of user testing, sample size to include input from a diverse range of background, propose to work with networks.

- Look to other institutions and their experiences.
- Language modules and using inclusive language, pillar (plain English, DLS, library, English as additional language)
- Utilise expertise across the institution around user experience and service design, including lessons learned from similar projects.

## Assessing the activity from different perspectives

*Might your proposal impact people who identify with the protected groups below in the following contexts?*

- *Access to or participation in UWE Bristol Faculties or Professional Services?*
- *Student experience, attainment or withdrawal?*
- *Staff experience, representation, or progression?*

*Explain why you have made that assessment and plan your response.*

### **Expected Benefits to the Student Experience**

#### 1. Personalised Support and Communication

- Benefit: CRM systems allow tailored communications and support based on individual student needs and preferences.
- Impact on Protected Groups: Students with disabilities or those from minority backgrounds may receive opt in/opt out functionality to more relevant information about services, events, or accommodations, reducing the feeling of exclusion.

#### 2. Improved Accessibility and Inclusion

- Benefit: CRMs can integrate accessibility features and track student needs across departments.
- Impact on Protected Groups: Ensures that students requiring adjustments (e.g. assistive technologies, alternative formats) are consistently supported across academic and professional services.

#### 3. Early Intervention and Wellbeing Monitoring

- Benefit: CRMs can flag students at risk based on engagement data (e.g. missed classes, low participation).
- Impact on Protected Groups: Enables proactive outreach to students who may face systemic barriers or mental health challenges, offering timely support and referrals.

#### 4. Streamlined Access to Services

- Benefit: A centralised system simplifies access to academic advising, counselling, financial aid, and career services.
- Impact on Protected Groups: Reduces bureaucratic hurdles that disproportionately affect students unfamiliar with university systems, such as first-generation students or those from disadvantaged backgrounds.

#### 5. Data-Driven Equity Monitoring

- Benefit: CRMs can generate reports on engagement, attainment, and service usage by demographic groups.
- Impact on Protected Groups: Helps universities identify and address disparities in outcomes, ensuring compliance with equality duties and fostering a more equitable environment.

## 6. Enhanced Belonging and Community Engagement

- Benefit: CRMs can promote events, societies, and networks tailored to diverse identities.
- Impact on Protected Groups: Encourages participation in inclusive communities, boosting confidence and retention among underrepresented students

## Staff Experience

### Expected Benefits to Staff Experience as CRM Users

#### 1. Accessible and Inclusive Technology

- Benefit: Modern CRMs are designed with accessibility standards (e.g. WCAG compliance), offering screen reader compatibility, keyboard navigation, and customisable interfaces.
- Impact on Protected Groups: Staff with disabilities benefit from tools that accommodate their needs, reducing barriers to participation and productivity.

#### 2. Consistent and Respectful Data Handling

- Benefit: CRMs can store and reflect preferred names, pronouns, and communication preferences.
- Impact on Protected Groups: Staff who are transgender or dealing with transgender students, non-binary, or from diverse cultural backgrounds are more likely to feel respected and accurately represented in institutional systems.

#### 3. Improved Efficiency and Reduced Mental Load

- Benefit: CRMs automate repetitive tasks (e.g. follow-ups, reminders, data entry), freeing up time for strategic work. AI functionality adds to the reduction of repetitive tasks and increases ability for wider staff group to contribute to enquiry triage, reducing anxiety and increasing informed decision making.
- Impact on Protected Groups: Staff with neurodiverse conditions or caring responsibilities benefit from reduced stress and more manageable workloads.

#### 4. Enhanced Collaboration and Transparency

- Benefit: CRMs provide shared access to student records, communications, and case notes across departments.
- Impact on Protected Groups: Staff from underrepresented groups may find it easier to contribute to cross-functional teams and have their input recognised, fostering inclusion and visibility.

#### 5. Data-Driven Decision Making

- Benefit: CRMs enable staff to analyse student engagement and outcomes by demographic groups.

- Impact on Protected Groups: Staff involved in EDI work can use CRM insights to advocate for targeted interventions and policy changes, supporting equity goals.

#### 6. Professional Development and Recognition

- Benefit: CRM usage can be linked to performance metrics, project tracking, and impact reporting.
- Impact on Protected Groups: Staff whose contributions are often informal or invisible (e.g. pastoral care, mentoring) can have their work documented and valued, supporting fairer assessment of productivity.

#### 7. Safer and More Supportive Work Environment

- Benefit: CRMs can facilitate confidential reporting and tracking of student welfare cases.
- Impact on Protected Groups: Staff managing sensitive issues (e.g. harassment, discrimination) can rely on secure systems that support safeguarding and accountability.

**Action Planning:** how will you mitigate negative and maximise positive outcomes?

Please feed information from this action plan to your activity’s own planning documents e.g., action plans, risk registers, benefits maps

	<b>Possible Positive Impact on Groups</b> Include relevant data if possible	<b>Possible Negative Impact on Groups</b> 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)	-More consistent, timely and transparent responses to enquiries through a single CRM system. -Reduced need for students to repeat information, improving	- Risk that unfamiliar processes or automation (including AI-supported responses) may create confusion or anxiety if not well explained. - Risk of inappropriate data visibility if access	- Ensure role-based access controls limit visibility of sensitive information whilst remaining open to all other staff users. - Provide clear guidance for staff	Lucy Scott	End of 2026 once live and being used.	-Positive staff and student feedback recorded via CRM feedback mechanisms. -No reported data protection or inappropriate data access incidents.	

	<p>dignity and reducing stress.</p> <ul style="list-style-type: none"> <li>- Improved tracking and handover between teams supporting students with multiple needs.</li> <li>-lessen failure demand workload distribution to teams</li> </ul>	<p>controls are poorly configured.</p> <p>Risk that responses including AI responses to not align with UWE cultural tone.</p> <p>Algorithmic or systemic bias in AI-supported responses disadvantaging racialised groups, disabled students, or those using non-standard English.</p>	<p>on appropriate use of data and AI-generated content.</p> <ul style="list-style-type: none"> <li>-Build in feedback loops for students and staff to raise concerns and suggest improvements.</li> </ul>			<ul style="list-style-type: none"> <li>-Evidence that role-based access controls are correctly applied and reviewed.</li> <li>-Issues raised through feedback loop are logged, reviewed and actioned.</li> </ul>	
<p><b>Age</b> (older people, younger people)</p>	<p><b>Possible Positive Impact on Groups -</b></p> <p>Digital-first enquiry routes may particularly benefit digitally confident students who expect quick responses and self-service.</p> <ul style="list-style-type: none"> <li>- Knowledge articles and AI support may reduce waiting times.</li> </ul>	<p><b>Possible Negative Impact on Groups -</b></p> <p>Older staff or students may find new digital tools less intuitive or feel less confident using them.</p> <ul style="list-style-type: none"> <li>- Risk of exclusion if alternative support routes are not clear.</li> </ul>	<p><b>Actions Required -</b></p> <ul style="list-style-type: none"> <li>Provide step-by-step guidance and accessible training materials for staff.</li> <li>-Ensure non-digital routes (email, phone) remain clearly signposted.</li> <li>-Allow sufficient bedding-in time</li> </ul>	<p>Lucy Scott</p>		<ul style="list-style-type: none"> <li>-Training completion rates are comparable across age groups.</li> <li>-Reduced number of "how-to" or basic usability queries over time.</li> <li>-Staff feedback indicates confidence using the system regardless of age or</li> </ul>	

			<p>before withdrawing legacy systems.</p> <ul style="list-style-type: none"> <li>- Allow sufficient in person and visible resource on help points for launch and bedding in</li> </ul>			<p>prior digital experience.</p> <ul style="list-style-type: none"> <li>-No increase in support requests linked to age-related usability issues.</li> </ul>	
<p><b>Disability,</b> including mental health and non-visible disabilities</p>	<p><b>Possible Positive Impact on Groups</b>-Centralised enquiry records support more consistent reasonable adjustments.</p> <ul style="list-style-type: none"> <li>-Reduced repetition of information may benefit students with anxiety, neurodiversity or mental health conditions.</li> <li>-Opportunity to integrate accessibility and inclusive language into knowledge articles.</li> </ul>	<p><b>Possible Negative Impact on Groups</b>-AI-generated responses may not always meet the needs of students with complex or nuanced support requirements.</p> <ul style="list-style-type: none"> <li>-Change may increase anxiety for some staff and students.</li> </ul>	<p><b>Actions Required-</b></p> <ul style="list-style-type: none"> <li>Ensure CRM and student-facing elements meet accessibility standards.</li> <li>-Maintain clear escalation routes to human advisors when AI support is insufficient.</li> <li>-Consult Disability Services on content, workflows and reasonable adjustment data handling.</li> </ul>	Lucy Scott		<ul style="list-style-type: none"> <li>-System meets accessibility standards and passes internal accessibility checks.</li> <li>-No unresolved accessibility-related complaints.</li> <li>-Positive feedback from Disability Services and staff users with reasonable adjustments.</li> <li>-Clear escalation from AI to human support is used appropriately where needed.</li> </ul>	

			- Share with the Disability Staff Network				
<b>Women and men</b>	<b>Possible Positive Impact on Groups</b> -Flexible, asynchronous enquiry handling may benefit staff and students with caring responsibilities. -Clearer case tracking may reduce workload pressures in frontline roles. - Improved transparency may support fairer workload distribution and reduce reliance on informal or unseen labour.	<b>Possible Negative Impact on Groups</b> - Staff who work part-time (more commonly women) may find it harder to attend scheduled training.	<b>Actions Required</b> - Offer training in multiple formats (live, recorded, self-paced). -Ensure implementation plans recognise flexible and part-time working patterns.	Lucy Scott		-Flexible training options uptake across different working patterns. -No evidence of unequal access to training or system support. -Staff satisfaction survey results show no gender-based variation in confidence using the system.	
<b>Trans and non-binary people, including gender reassignment</b>	<b>Possible Positive Impact on Groups</b> -Ability to record and use preferred names and pronouns supports respectful communication.	<b>Possible Negative Impact on Groups</b> -Risk of misgendering or misuse of personal data if fields are not used correctly by staff.	<b>Actions Required</b> - Provide guidance and training on inclusive data use, including names and pronouns.	Lucy Scott		-Preferred names and pronouns are accurately recorded and consistently used. -No reported incidents of	

	-Reduced need for individuals to repeatedly explain or correct their identity.	-Over-reliance on systems without staff understanding may reinforce exclusion or harm.	-Ensure audit and correction processes are clear if errors occur. -Limit visibility of gender identity data to roles that genuinely require it. -Ensure teams that interact with the system are trained in the most up-to-date EDI training.  -Update and improve the system as new policies arise.			misgendering linked to CRM data usage. -Staff demonstrate awareness and confidence in handling sensitive gender identity data. -Clear correction process used where data issues are identified.	
<b>Marriage and/or civil partnership</b>	<b>Possible Positive Impact on Groups</b> -No specific differential impact anticipated. -Neutral handling of personal data supports fairness and consistency.	<b>Possible Negative Impact on Groups</b> None identified.	<b>Actions Required</b> - Ensure no assumptions are built into templates or automated communications about marital status.	Lucy Scott		-Communications and templates do not make assumptions about marital status. -No complaints or feedback indicating inappropriate data	

						use related to marital status.	
<b>Pregnancy and/or maternity, including Adoption</b>	<b>Possible Positive Impact on Groups</b> -CRM flexibility enables staff to return to systems after leave without loss of information. -Centralised records reduce dependency on informal knowledge.	<b>Possible Negative Impact on Groups</b> - Staff on leave during implementation may miss training or updates.	<b>Actions Required</b> - Ensure refresher training and onboarding support is available for returners. -Maintain clear documentation and user guides accessible at any time.	Lucy Scott		-Staff returning from leave report that training and system knowledge gaps have been addressed. -Refresher training or support is accessed by returners where needed. -No delays or errors attributed to missed implementation activity.	
<b>Race, including ethnicity and citizenship</b>	<b>Possible Positive Impact on Groups</b> -Consistent enquiry handling may reduce bias or variability in responses. -Knowledge articles can be written in clear, inclusive language benefiting international students and	<b>Possible Negative Impact on Groups</b> - Risk that automated responses may not fully account for cultural context or complex immigration-related queries. -Language used (even if "plain") may still be	<b>Actions Required</b> - Use plain English in communications and knowledge articles. -Enable easy escalation from AI or scripted responses to trained staff. -Test content with diverse student	Lucy Scott		-Knowledge articles and responses are written in plain English and reviewed for clarity. -International students and staff report understanding responses without	

	<p>those using English as an additional language.</p> <p>-Centralised data may support better identification of patterns of inequality in service experience or outcomes.</p>	<p>difficult to understand or culturally unfamiliar for some users.</p>	<p>groups where possible.</p> <p>- Enable clear and timely escalation to trained staff, particularly for complex or sensitive queries, especially around immigration queries.</p>			<p>additional clarification.</p> <p>-Escalation rates from AI responses for complex queries are monitored and appropriate.</p> <p>-No complaints relating to culturally insensitive or inappropriate responses.</p>	
<p><b>Religion and/or belief, including those without religion and/or belief</b></p>	<p><b>Possible Positive Impact on Groups</b>-Asynchronous enquiry channels allow engagement outside standard hours.</p> <p>-No requirement for face-to-face interaction may benefit some students.</p> <p>-Consistent processes can help ensure fair and respectful treatment regardless of belief.</p>	<p><b>Possible Negative Impact on Groups</b> - Key updates, training or engagement activities may unintentionally clash with religious observance.</p>	<p><b>Actions Required</b>-</p> <p>Avoid scheduling critical activities during major religious festivals where possible.</p> <p>-Offer flexible access to training and materials.</p>	Lucy Scott		<p>-Training attendance is strong across multiple sessions and formats.</p> <p>-No feedback indicating exclusion due to timing of activities.</p> <p>-Engagement levels remain consistent during key religious periods.</p>	

<p><b>Sexual orientation</b></p>	<p><b>Possible Positive Impact on Groups</b>-Neutral, inclusive systems reduce the need for disclosure unless relevant. -Clear data-handling processes support privacy and dignity. -Standardised approaches reduce the risk of individuals being treated differently based on perceived or disclosed sexual orientation.</p>	<p><b>Possible Negative Impact on Groups -</b> Risk of inappropriate disclosure if access controls are too broad. -Over-collection of data without clear purpose may undermine trust</p>	<p><b>Actions Required--</b> Ensure sexual orientation data is only collected and viewed where there is a clear business need. -Reinforce confidentiality and data protection responsibilities during training. -Ensure that data collected has a clear purpose and is deleted within the retention rules.</p>	<p>Lucy Scott</p>		<p>-Sexual orientation data is accessed only where there is a clear business need. -No data protection incidents or inappropriate disclosures reported. -Staff demonstrate understanding of confidentiality obligations in training feedback.</p>	
<p><b>Other specific group (e.g., International or Access)</b></p>							

## 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?

*Feedback from students and staff once using the new system.*

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

*End October 2026 which is the close of Ph3 of the Student Enquiry Management Project.*

## 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: Temba Mahari

Date: 14.05.26

## 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:  Lucy Scott, Director

Faculty/ Department/ Service: Student and Campus Life

Date: 08/05/26

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.