

Integrated Equality and Fairer Scotland Duty Impact Assessment

1. Details of the proposal

Title of proposal/policy/project/plan to be assessed	My SOSE/Project Janus – Phase 2: Alpha
Is this a new or revised proposal/policy/project/plan?	new
Service area: Department:	Finance & Corporate Resources IT
Lead officer: <i>(Name and job title)</i>	Anthony Daye
Other officers/partners involved: <i>(List names, job titles and organisations)</i>	Nick Silverstein/Susan Harkins/Sandra McGuire/Wilma Norris
Date(s) Equality Impact Assessment completed:	04.08.22 – 08.09.22 – Reviewed:30/11/22 Reviewed 30/05/2023

2. Cumulative Impact

Will there be any cumulative impacts as a result of the relationship between this proposal and other proposals/policies/projects/plans?

If yes, please state here:

Yes: Impacts upon all delivery policies re client interactions

3. Scoping, data and evidence gathering

Why are you introducing a new proposal/policy/project/plan, or why are you revising an existing one?

SOSE (South of Scotland Enterprise) currently use a Microsoft Dynamics Client Relationship Management system known internally as CRM2, this is a web-based platform that records all client data and SOSE interactions to provide a 360-degree overview of SOSE engagement with clients and for reporting on client enquiries and engagement. The CRM dynamics platform has been used by Enterprise Agencies and Business Gateway for approximately 15 years, the platform was designed to manage a national growth pipeline and account management delivery model. SOSE use the CRM2 platform as part of a shared service agreement with Scottish Enterprise with SOSE owning all data relating to South of Scotland clients stored in the CRM2 platform.

During June 2021, SOSE undertook a review of the client experience to further enhance our understanding of the client journey and held several workshops with the SOSE team and produced the following key recommendations:

- There is a need to better articulate the SOSE offering for clients
- There is an opportunity to improve client experience at First Point of Contact.
- 'We all do things slightly differently' – Development of Standard Operating Process documents and a staff toolkit would help ensure consistent client experience by setting clear expectations of what is required, and when along the client journey

	<ul style="list-style-type: none"> • Development of client facing collateral that staff can employ at critical points in the journey would aid clients' understanding of requirements and support operational efficiency. <p>Following on from this report, SOSE held internal workshops to identify work streams. The workshops delivered a proposed delivery model for an improved client first point of contact and highlighted the critical role CRM plays in the enhancement of the client journey with a need to transform our digital activity if SOSE is to improve delivery of support services for our clients and staff, and to report on key performance indicators.</p>
<p>What is the purpose of the proposal/policy/project/plan?</p>	<p>SOSE continues to progress our business transformation programme and improve the client journey. This is also a priority for The Scottish Government NSET (National Strategy for Economic Transformation) Theme 6 - Culture of Delivery. Expectations are high on improving delivery for our staff and enterprises ensuring support is tailored to meet the needs of our region, ensuring that we have the supporting technical and data architecture for future service delivery.</p> <p>As part of our initial service design, a working group was established in September 2020 to scope out post Covid delivery. As part of this process a vision emerged of an interactive platform for both staff and customers. Further investigation identified Highlands & Islands Enterprise digital solution MYHIE. Meetings and demonstrations were held between SOSE Heads of Operations and HIE to explore opportunities.</p> <p>During April 2021, the client journey work highlighted inefficiencies within SOSE current CRM system and identified a need to explore digital solutions, and due to previous connections with HIE, we embarked on an exploration phase with Leidos and MYHIE to understand whether the system could be aligned with SOSE client delivery. The initial investigative meetings highlighted significant opportunities to transform digital delivery for Enterprises in the South of Scotland, including:</p> <ul style="list-style-type: none"> • the need for a 'no wrong door' approach with consistent initial engagement, intelligent assessment, access to information and effective signposting. • a joined-up client experience which is simple, quick, accessible, and consistent. • tailored, personalised and flexible support available when and where needed with flexibility as to timing, location, criteria, types/stage of business.

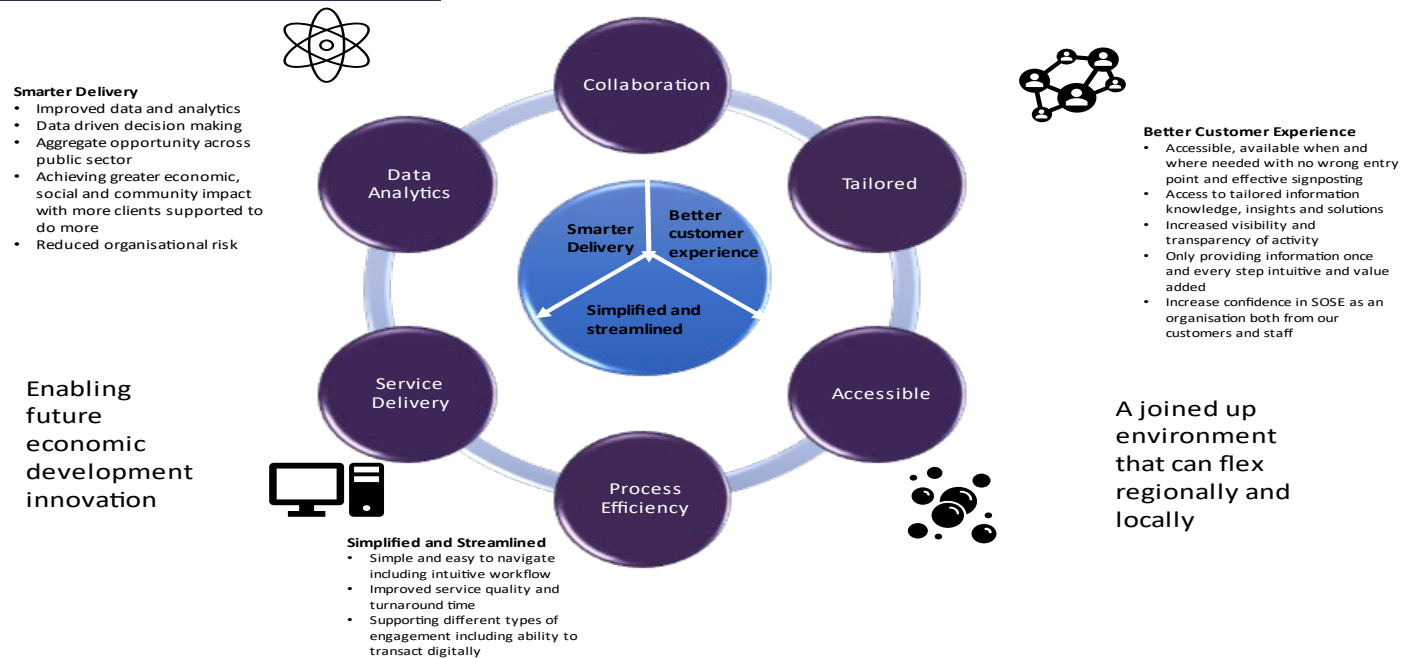
	<ul style="list-style-type: none"> • access to well informed advisors who provide added value expertise and challenge, inspire, identify new opportunities, address challenges, support whole client journey and work collaboratively across agencies • maximise use of digital technology to facilitate client journeys and access to support – encouraging innovation, extending reach, increasing participation, and providing equality of opportunity. • utilising Microsoft Power Platform which is a low-code environment, removing several complexities associated with traditional CRM offerings. This allows required changes to happen quickly, ensuring that the system can grow along with required use cases and SOSE requirements. Also, as they are part of the same platform, allow for far more detailed analytics and reports utilising Power BI, ensuring more informed decisions can be made • HIE has already utilised Microsoft Power Platform in their own platform, MyHIE, and SOSE exploratory work identified close alignment between MYHIE and the aims of digital delivery for SOSE, • MYHIE is an existing solution available to SOSE, the opportunity to reuse/adapt an existing solution rather than recreate our own is preferable, especially as this would align with HIE to create an uncluttered product and service environment supported by common processes, clear eligibility criteria and good cross agency shared knowledge and co-design • data, analytics, and insights captured and appropriately shared – being used to: inform and improve service design, allow tailored and responsive client journeys, enable intelligent and sophisticated targeting of support and resources, encourage creative use of open data, and facilitate assessment of impact. • SOSE has an opportunity to be bold by adopting a new system to drive client excellence and collate information bespoke to SOSE that can inform future strategy and delivery as well as creating building blocks for the future.
<p>Who will the proposal/policy/project/plan affect?</p> <p><i>Is it location specific & if so, is it located in an area of socio-economic disadvantage?</i></p>	<p>All SOSE staff and clients</p>
<p>Who will benefit from the proposal/policy/project/plan?</p>	<p>AS ABOVE</p>

<p><i>(eg employees, service users, equality groups, other stakeholders)</i></p>	
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What is the intended outcome(s) and impact of the proposal/policy/project/plan?

(Set out a clear understanding of the purpose of the proposal being developed or reviewed including the aims, objectives, intended outcomes and the context within which it will operate)

SMARTER DELIVERY



VISION - EXTERNAL CUSTOMERS

SOSE wants to drive inclusive growth, increase competitiveness, and tackle inequality within the region. We want to establish the South of Scotland as a centre of opportunity, innovation, and growth. Through delivery of our vision, we will create an environment for clients which will enable them to:

- Transact digitally, in an accessible and user-friendly way, including the ability to self-serve and input information to SOSE systems where appropriate
- Provide information only once, knowing it is safe and secure, and only when it is required as a step within a process

- Have a holistic view of their engagement with SOSE, including tracking of process journey
- Gain increased access to better knowledge, information, insights
- Increased access to better support.

VISION - INTERNAL CLIENTS

Similarly, in delivering our vision, we will provide new services for our staff which will support them in:

- An easier and more streamlined approach to doing our jobs
- Accessing real-time information to inform client engagement, relationships, and business support
- Added value assessments and engagements to ensure we are doing the right things for our clients - tailored support and innovative solutions
- Extending the reach of SOSE - engaging with more clients
- Being more responsive and agile in responding to client needs
- Gaining increased access to better knowledge, information, insights, and analytics
- Using data and analytics to inform future decisions

VISION - PARTNERS

We recognise that successful delivery of added support environment requires increased public sector collaboration and SOSE has actively sought to be at the forefront of an innovative approach to collaboration within the context of the Scottish Government 10 Year Economic Strategy, NSET theme 6 - Culture of Delivery which targets support more effectively to businesses regionally and supports delivery with technical and data architecture for future services. There is already strong and meaningful close working and collaboration across Scotland's three Enterprise Agencies in the work we do to support inclusive and sustainable economic growth. Respective senior teams of the agencies meet regularly and have identified common key areas of collaboration, complemented by excellent engagement at thematic team level. The Enterprise Agencies are already collaborating on the refresh of their respective three-year plans, which is informed by the ongoing work around the NSET.

<p>What quantitative and/or qualitative evidence have you considered when deciding to develop a new proposal/policy/project/plan or revise a current one?</p> <p><i>Information can include, for example, surveys, focus groups, databases, interviews, pilot projects, reviews of complaints made, user feedback, academic publications, and so on.</i></p>	<ul style="list-style-type: none"> ✓ April 2020 - Establishment of SOSE following Scottish Government Enterprise & Skills Review 2016 - Vision to meet distinct needs of business and communities in South of Scotland ✓ September 2020 to Dec 2020 - SOSE establishes weekly Operational Design workshops to shape SOSE client journey and offering, MYSOSE concept discussed and led to exploratory discussions with MYHIE during Jan 2021 ✓ March 2021 - External Consultant appointed to review client journey, recommendations to map-out client journey ✓ June 2021 - client journey work highlights action to speak to HIE, MYHIE demo workshop delivered to SOSE staff and continued dialogue with HIE regarding MYHIE system ✓ August 2021 - phase 1 update to SLT along CRM research ✓ August 2021 - phase 2 client journey starts and development of MYSOSE business case ✓ December 2022 - SLT update on completion of phase 1 and comms plan. Phase 2 client journey mapping continues ✓ January 2022 - MYSOSE Business Case approved. ✓ February 2022 - Project Manager appointed to MYSOSE and appointment of Leidos to start discovery <p>The following refers to internal and external consultations with stakeholders during and after the establishment of SOSE, where the key theme was transformational change required in delivery of services in South of Scotland to drive economic growth and inclusion.</p> <ul style="list-style-type: none"> ✓ SOSEP and SOSE Consultations ✓ Consultations on South of Scotland Regional Economic Strategy and SOSE operational plan ✓ Business Support Partnership User Research - first point of contact ✓ South of Scotland Business Panel Surveys ✓ SOSE internal CRM user research
<p>Who did you consult with?</p>	

<p><i>Examples include equality groups, civil servants, service users, and so on</i></p>	<p>During the establishment of SOSE and our first 2 years in operation, SOSE has been engaging with stakeholders across business, communities and the third sector. An additional piece of engagement was carried out this year by Sleeping Giants to ensure that we were reaching out to individuals with seldom heard voices who had challenges engaging with the public sector. A summary of this engagement is below:-</p> <p>Following the passing of the South of Scotland Enterprise Act 2019, South of Scotland Enterprise (SOSE) was officially launched in April 2020 as the Economic and Community Development Agency for Dumfries and Galloway and the Scottish Borders. The aims of the Act are to:</p> <ol style="list-style-type: none"> a. Further the sustainable economic and social development of the South of Scotland; and b. Improve the amenity and environment of the South of Scotland. <p>SOSE, along with other key partners in the region, is working towards a shared ambition – set out in the South of Scotland Regional Economic Strategy published in 2021 – for a greener, fairer and flourishing South of Scotland by 2031. The core values of shared prosperity, making the most of our potential, thinking differently and pioneering environmental responsibility underpin the Strategy’s vision:¹</p> <p style="text-align: center;"><i>“We will be a region of opportunity and innovation – where natural capital drives green growth, ambition and quality of life rivals the best in the UK, communities are empowered and cultural identity is cherished, enabling those already here to thrive and attracting a new generation to live, work, visit, learn and invest in the South of Scotland.”</i></p> <p>With support from the Southern Uplands Partnership, SOSE has conducted an engagement tour across the region. The purpose of the tour was to:</p> <ul style="list-style-type: none"> • Raise awareness of what SOSE was established to do, how it can help organisations and communities across the South and to showcase some of the things it has been doing to make a difference to businesses, social enterprises, community and other organisations across the region;
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¹ South of Scotland Regional Economic Partnership (2021). South of Scotland Regional Economic Strategy. [South of Scotland Regional Economic Partnership - Regional Economic Strategy \(dumgal.gov.uk\)](https://www.dumgal.gov.uk/south-of-scotland-regional-economic-partnership-regional-economic-strategy)

	<ul style="list-style-type: none"> • To gather feedback about its focus and performance to date; and, • Explore what matters most to people, organisations and businesses across the region to help shape future priorities and SOSE’s first action plan. <p>A total of 416 people were engaged across the primary public and online sessions with a further 54 people engaged through three specific business breakfasts. However, in planning its engagement approach, SOSE recognised the challenge of reaching and engaging seldom heard voices. To help achieve a genuinely inclusive approach, Sleeping Giants were commissioned to support the engagement process. Sleeping Giants and SOSE then worked together to design and deliver outreach and engagement with businesses, community groups and residents who are (or who represent):</p> <ul style="list-style-type: none"> • Young people • Women • Other protected characteristic groups; and • Financially excluded or economically inactive
<p>What did you learn?</p>	<p>The majority of consultation around enterprise support highlights a consistent theme around engagement.</p> <p>The 2016 Scottish Government Enterprise & Skills Review; Scottish Parliament Business Support Inquiry; and the process for creating the South of Scotland Enterprise Agency all consulted extensively with businesses to identify their requirements when accessing business support. In summary the key feedback that consistently arises throughout each consultation from business/customer is as follows:</p> <ul style="list-style-type: none"> • Awareness and Signposting – poor customer awareness • Inconsistency – postcode lottery of services • Generalist approach to business support • Desire for more practical and one to one support • Too many agencies involved, and the business support landscape is confused

	<ul style="list-style-type: none"> • Rural specific – highlighted in terms of access to business support • More integration needed by business support delivery agencies <p>The Sleeping Giants research highlighted the need for more engagement across the region with different groups and the challenges of the rural area.</p> <p>SOSE is adapting the HIE platform and HIE conducted extensive user research which informed its design.</p>
<p>How did the consultation shape the proposal/policy/project/plan?</p>	<p>HIE conducted research on the platform. Our information showed the need for an online portal to engage further with clients, as well as more effective information recording.</p> <p>Consultation told us the existing CRM was ineffective & clunky. Evidence told us that integrating CRM with a digital solution would provide a more efficient & effective way of data capture and client engagement</p>
<p>Describe any gaps in the available evidence</p> <p><i>Does the activity exclude certain groups? Are there conditions applied to the activity which may indirectly lead to certain groups being excluded? It is not always possible to get information about all protected groups – lack of information does not mean that there will be no impact, however</i></p>	<p>Based on the evidence collected from all the various sources (client engagement tours, business survey, HIE’s evidence, tiger sessions with internal stakeholders etc) the only evidence gap we have been able to identify is around whether creating the system in the English language only, rather than in multiple languages will present a barrier for those for whom English is a second language or for those who are non-English speaking residents of the SoS.</p> <p>Our user testing plan will endeavour to ensure that gaps are identified and resolved at an early stage in each development phase where possible and proportionate.</p>

4. Legislative requirements

4.1 Relevance to the Public Sector Equality Duty	
<p>Do you believe your proposal has any relevance under the Equality Act 2010?</p> <p><i>(If you believe that your proposal may have some relevance, however small, please indicate 'yes'. If there is no effect, please enter 'no' and go to section 4.2)</i></p>	Yes
Equality Duty	Reasoning: The new system will involve people interactions and as such requires consideration under the PSED
<p>Elimination of discrimination (both direct and indirect), victimisation and harassment</p> <p><i>Will the proposal discriminate? Or help eliminate discrimination?</i></p>	It should help to eliminate discrimination by providing a more widely accessible system, written in accessible language, accessible formats etc, which can be accessed from a wider variety of devices & which should be compatible with screen readers et al. This will result in a system which can be used by more people, more of the time.
<p>Promotion of equality of opportunity between those who share a protected characteristic and those who do not</p> <p><i>Will your proposal help or hinder SOSE with this?</i></p>	The new system will be more accessible than the current one. Consequently, it will be able to be used by a greater variety of people, using a greater variety of equipment
<p>Foster good relations between those who share a protected characteristic and those who do not</p> <p><i>Will your proposal help or hinder SOSE's relationships with those that have equality characteristics?</i></p>	The system will aid us to interact with individuals with a greater variety of disabilities for instance, making our services accessible and usable to those for whom they were previously inaccessible.
Does your proposal/policy/project/plan ensure Human Rights articles compliance?	Compliant <input checked="" type="checkbox"/> Breach <input type="checkbox"/>

<p>Please indicate which articles your proposal/policy/project/plan relates to:</p> <p>Article 1 – Free and equal <input type="checkbox"/></p> <p>Article 2 – Right to life <input type="checkbox"/></p> <p>Article 3 – Prohibition of torture <input type="checkbox"/></p> <p>Article 4 – Prohibition of slavery and forced labour <input type="checkbox"/></p> <p>Article 5 – Right to liberty and security <input type="checkbox"/></p> <p>Article 6 – Right to a fair trial (e.g., disciplinary procedures) <input type="checkbox"/></p> <p>Article 7 – No punishment without the law (e.g., disciplinary procedures) <input type="checkbox"/></p> <p>Article 8 – Right to respect for private and family life <input type="checkbox"/></p> <p>Article 9 – Freedom of thought, conscience and religion <input type="checkbox"/></p> <p>Article 10 – Freedom of expression <input type="checkbox"/></p> <p>Article 11 – Freedom of assembly & association (e.g., trade union recognition) <input type="checkbox"/></p> <p>Article 12 – Right to marry <input type="checkbox"/></p> <p><i>(N.B.) Article 13 has been removed</i></p> <p>Article 14 – Prohibition of discrimination (e.g., protected characteristic groups) <input type="checkbox"/></p> <p> Protocol 1 Article 1 – Protection of property <input type="checkbox"/></p> <p> Protocol 1 Article 2 – Right to education <input type="checkbox"/></p>	<p>As a public sector body we have all relevant checks in place.</p> <p>This project will assist the people of the South of Scotland to realise their economic, social or cultural rights through increasing SOSEs reach, and encouraging participation and engagement with our products and services.</p>
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<p>4.2 Which groups of people do you think will be or potentially could be impacted by the implementation of this proposal?</p>
<p><i>Consider employees, clients, service users, and any other relevant groups</i></p>
<p>Please tick below as appropriate, outlining any potential impacts on the equality groups this proposal may have</p>

	Impact			Please explain the potential impacts
	No impact	Positive impact	Negative impact	
AGE <i>A person belonging to a particular age or a specific age group (children, young people, elderly)</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<p>Implementing this system will not impact customers' ability to interact with SOSE using other channels - Ensuring non-digital forms of engagement and communication continue will mitigate any risks.</p> <p>Younger people are known to engage well with digital technology and this may help widen or improve our reach for this particular audience.</p>
DISABILITY <i>A person has a disability if they have a physical or mental impairment which has a substantial adverse effect on their ability to carry out normal day-to-day activities. This can include visible and non-visible disabilities</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<p>This project will deliver a customer portal which will be designed with awareness of potential impairments and accessibility challenges. This will be evidenced through user research and testing feedback.</p> <p>The system will be designed to increase the availability, reach and clients' ability to engage with and access SOSE's information, products and services.</p> <p>However, increased reliance on digital access may disadvantage some who are less likely to engage with digital platforms as a result of various health conditions. Ensuring non-digital forms of engagement where required will help mitigate this.</p>
GENDER REASSIGNMENT / TRANS/TRANSGENDER IDENTITY <i>This includes anyone who has proposed, started or completed a</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	n/a

<i>process to change their gender from the one assigned to them at birth</i>				
MARRIAGE OR CIVIL PARTNERSHIP <i>Marriage is a union between two people, while civil partnership is a form of legal recognition for a relationship</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	n/a
PREGNANCY AND MATERNITY <i>This refers to the period during and after the birth and is linked to maternity leave in the employment context or protection against maternity discrimination for 26 weeks after giving birth</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Out of hours remote access to customers data and information may be of particular benefit for pregnant women and those on maternity, paternity or adoption leave. SOSE don't currently record if customers are pregnant so will be unable to measure this.
RACE <i>Including ethnic origins, nationality, colour, and minorities such as gypsy/travellers, refugees, migrants and asylum seekers</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	There is a slim possibility of a negative impact upon those from ethnic minority communities, because there are no plans to provide the portal in multiple languages. Demographic evidence from the region suggests that the resource required to translate the system into languages other than English would be disproportionate to the needs of SOSEs clients and the people currently living and working in the region and therefore impractical.
RELIGION OR BELIEF <i>Refers to any religion, belief, or philosophical belief, including a lack of religion or belief</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	n/a
SEX – GENDER IDENTITY <i>Men and women, boys and girls, and those who self-identify their gender, including non-binary people</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Evidence tells us that the SoS has more female than male carers resident in the region. Out of hours remote access to customers data and information may be of particular benefit for individuals with caring responsibilities in this area.
SEXUAL ORIENTATION				n/a

A person's identity in relation to the gender or genders to which they are, or are not, sexually attracted to	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
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4.3 Fairer Scotland Duty

This duty places a legal responsibility on organisations to actively consider how we can reduce inequalities of outcome caused by socio-economic disadvantage when making strategic decisions

Is the proposal strategic?

Yes

If not, go to section 4.4

If yes, please indicate any potential impact on the undernoted groups this proposal may have

	Impact			Please explain the potential impacts
	No impact	Positive impact	Negative impact	
LOW AND/OR NO WEALTH <i>This includes having enough money to meet basic living costs and pay bills, but not having any savings to deal with any unexpected outgoings and little to no provision for the future</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	The new portal will allow us to collate data which will help us to identify gaps, therefore allowing us to focus our efforts on the areas most requiring enterprise support
MATERIAL DEPRIVATION <i>This includes being unable to access basic goods and services such as financial products like life insurance, electrical goods,</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	The new portal will allow us to collate data which will help us to identify gaps, therefore allowing us to focus our efforts on the areas most requiring enterprise support

leisure and hobby activities, heating, and so on				
AREA DEPRIVATION <i>Where someone lives (e.g., rural areas), and where someone works (e.g., accessibility of transport)</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	The new portal will allow us to collate data which will help us to identify gaps, therefore allowing us to focus our efforts on the areas most requiring enterprise support.
SOCIO-ECONOMIC BACKGROUND <i>Social class, including parents' education, employment and income</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	The new portal will allow us to collate data which will help us to identify gaps, therefore allowing us to focus our efforts on the areas most requiring enterprise support
LOOKED AFTER and CARE EXPERIENCED PEOPLE	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
CARERS <i>Paid and unpaid, including family members</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	This project will make it easier for those who are restricted by caring commitments to access our services. SOSE don't record this information so are currently unable to report on this.
HOMELESSNESS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	n/a
ADDICTIONS and SUBSTANCE ABUSE	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	n/a
THOSE INVOLVED WITHIN THE CRIMINAL JUSTICE SYSTEM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	n/a

4.4 Environmental sustainability, climate change and energy management				
<i>How will the proposal/policy/project/plan affect the environment and carbon usage?</i>				
	Impact			Please explain the potential impacts
	No impact	Positive impact	Negative impact	
THE ENVIRONMENT <i>e.g., carbon usage, pollution etc.</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

5. Mitigating actions and recommendations

Consider:

- Could you modify the proposal to eliminate discrimination or reduce any identified negative impacts? If necessary, consider other ways in which you could meet the aims and objectives of the proposal
- Could you modify the proposal to increase equality and, if relevant, reduce poverty and socio-economic disadvantage?
- Describe any modifications which you can make without further delay (e.g., easy, few resource implications such as information in different formats and languages etc.)

Considering alternatives and mitigation			
<i>Are you able to reduce any potential negative impacts identified above?</i>			
EQUALITY CHARACTERISTIC / SOCIO-ECONOMIC FACTOR	MITIGATION	RESOURCE IMPLICATIONS <i>Financial, people, health, property, etc.</i>	APPROVED? Yes / No
Disability	Continuing to ensure that SOSEs services can be accessed using non-digital forms of engagement		
Age	Continuing to ensure that SOSEs services can be accessed using non-digital forms of engagement		
Race	The system/portal could be made available in multiple languages	Resource implications would be significant and costly and it is expected that the time and cost required to translate the system would be disproportionate to the level of benefit which this would provide.	

6. Conclusions and planned action

Is further work required?	Yes
What action is to be taken?	Beginning in Alpha and as the project moves into Beta Phase, as a 'product' becomes available to test, a non-live system will be tested by individuals with lived experience of various disabilities and of using varying pieces of digital viewing equipment to ensure the system is useable with as wide a variety of people as possible.

	It will also be tested by those from different age groups and sexes and those for whom English is a second language. Currently customers are supported by their allocated SOSE specialist who can help with any language barriers.
Who will undertake it?	The testing phase will be run in conjunction with various external organisations representing those with varying disabilities
When will it be done?	Beginning in Alpha and completed during Beta Phase.
How will it be monitored, by whom and when/how often? <i>(e.g., through service plans)</i>	Testing will be monitored by the project team.

7. Recommendations and reasoning

Select which applies:

- Implement proposal with no amendments (as a positive impact is explicitly intended and very likely)
- Implement proposal taking account of mitigating actions (as outlined above)
- A negative impact is probable or certain for some groups, but the policy can nevertheless be justified as a proportionate means of achieving a legitimate aim
- Reject proposal due to disproportionate impact on equality, poverty, health and/or socio-economic disadvantage


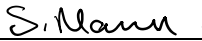
Reason for recommendation:

Impact Assessments for each phase will be regularly revisited in order to ensure requisite research and user testing with individuals with lived experience of various protected characteristics are considered throughout. With this level of continued evidence gathering it is expected that the benefits of the new system/portal far outweigh any possible disadvantages.

8. Ongoing Monitoring

How often will this proposal/policy/project/plan be monitored and reviewed, with Equality in mind?	At each phase of the project
What stages of monitoring will be implemented? <i>Eg: collecting and analysing information, identifying inequalities, investigating the causes of these and removing any discrimination or barriers to economic progression.</i>	Evidence from those with lived experience will be sought continually throughout the project lifecycle
How will you monitor?	By collecting and evaluating the experiences of individuals with protected characteristics
How and how often will you analyse the results?	At every phase of the process

9. Approval and Publishing

Signed by Project/Policy Lead:	 Anthony Daye
Role:	SR0/Director of Finance & Corporate Resources
Date:	2 June 2023
Signed by Fair Work and Equalities Lead:	
Date:	30/05/2023
Publishing Date:	