



Bristol City Council Equality Impact Relevance Check

This tool will identify the equalities relevance of a proposal, and establish whether a full Equality Impact Assessment will be required. Please read the guidance prior to completing this relevance check.

What is the proposal?	
Name of proposal	A new Case Management system to handle Complaints, FOI's, Feedback, Subject Access Requests and Councillor/MP Enquiries
Please outline the proposal.	<p>Salesforce is the council's current system for recording and monitoring Complaints and Freedom of Information Requests (FOI's). However, due to over-complicating the requirements, the Salesforce system is counter-intuitive and difficult for users to operate, which is why two years after launch only a handful of business users now use the system. The majority of services process their complaints and FOI's outside the system with Customer Relations staff operating the system on their behalf.</p> <p>Unfortunately this has meant most services as a result cannot see their cases, or reports, and any learning opportunities within complaints must be identified by Customer Relations and relayed back to services.</p> <p>Since the launch of Salesforce in 2015 when several hundred staff were trained and started to use it, there has been a steady decline – now only approximately 40-50 users operate Salesforce. This has had the effect of systematically lowering performance levels right across the authority with cases not being processed. Citizens who are acknowledged when they submit complaints do not sometimes receive responses, which can cause dissatisfaction levels to increase, further complaints 'about handling issues' and increased phone calls to the CSC.</p> <p>Complicated work-arounds are in place to shore-</p>

up services not using Salesforce, with members of the Customer Relations Team operating Salesforce on behalf of the majority of services. There is now widespread dissatisfaction with the current arrangement, which has been highlighted externally by the British Standards Group in their annual assessment. BSI is the business standards company that helps organizations make excellence a habit all over the world.

For complaints management the national standard is ISO:10002 and Bristol City Council has achieved accreditation to this standard in 2016 and 2017.

Also, the council's own Internal Audit completed in 2016 stated 'a very unsatisfactory situation.'

The growing dissatisfaction within Senior Management requires a report into the council's continued use of Salesforce for Complaints and FOI's, with an emphasis on replacing it with a cheaper, more accessible and user friendly system.

- The problem is Salesforce
- The solution is to replace Salesforce with a new system, which would have cheaper running and licensing costs, would improve the council's external and internal reputation when dealing with cases and introduce learning capabilities from complaints through systematic reporting, which is not currently possible.

What savings will this proposal achieve?	It is estimated the council will save approx. £104K if we end the contract with Salesforce for Complaints and FOI's and procure a new system.
Name of Lead Officer	Garfield Horner

Could your proposal impact citizens with protected characteristics? (This includes service users and the wider community)
Please outline where there may be significant opportunities or positive impacts, and for whom.

None anticipated – we're changing a Complaints and FOI recording system which is not fit for purpose for one which will be.

Please outline where there may be significant negative impacts, and for whom.

NA

Could your proposal impact staff with protected characteristics?

(i.e. reduction in posts, changes to working hours or locations, changes in pay)

Please outline where there may be significant opportunities or positive impacts, and for whom.

None anticipated.

Please outline where there may be negative impacts, and for whom.

Is a full Equality Impact Assessment required?

Does the proposal have the potential to impact on people with protected characteristics in the following ways:

- access to or participation in a service,
- levels of representation in our workforce, or
- reducing quality of life (i.e. health, education, standard of living) ?

Please indicate yes or no. If the answer is yes then a full impact assessment must be carried out. If the answer is no, please provide a justification.

No. None anticipated.

Service Director sign-off and date:
Patsy Mellor

Equalities Officer sign-off and date:



Duncan Fleming 20/09/2018