

# Equality Impact Assessment [version 2.9]



Title: Microsoft Dynamics – Direct Award	
<input type="checkbox"/> Policy <input type="checkbox"/> Strategy <input type="checkbox"/> Function <input checked="" type="checkbox"/> Service <input type="checkbox"/> Other [please state]	<input type="checkbox"/> New <input checked="" type="checkbox"/> Already exists / review <input type="checkbox"/> Changing
Directorate: Resources	Lead Officer name: Simon Oliver
Service Area: Digital Transformation	Lead Officer role: Director – Digital Transformation

## Step 1: What do we want to do?

The purpose of an Equality Impact Assessment is to assist decision makers in understanding the impact of proposals as part of their duties under the Equality Act 2010. Detailed guidance to support completion can be found here [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](https://sharepoint.com).

This assessment should be started at the beginning of the process by someone with a good knowledge of the proposal and service area, and sufficient influence over the proposal. It is good practice to take a team approach to completing the equality impact assessment. Please contact the [Equality and Inclusion Team](#) early for advice and feedback.

### 1.1 What are the aims and objectives/purpose of this proposal?

Briefly explain the purpose of the proposal and why it is needed. Describe who it is aimed at and the intended aims / outcomes. Where known also summarise the key actions you plan to undertake. Please use plain English, avoiding jargon and acronyms. Equality Impact Assessments are viewed by a wide range of people including decision-makers and the wider public.

<p>To integrate the Citizen Service Customer Relationship (CRM) systems with Microsoft Dynamics. This system will be used by staff at the Customer Services Centre and Citizen Service Point. Microsoft Dynamics software is needed to ensure that Bristol City Council staff can access customer records from one place as opposed to numerous databases. The system will allow for at last count 697,793 enquires from service users to have their records accessed efficiently by customer service advisors at first point of contact.</p> <p>Without this system customer service advisors will continue to work in silos to access records. This integration is part of the wider Digital Transformation Programme but requires sign off as it was missed from the previous budget, Equality Impact Assessment, and roll out.</p> <p>Purchasing this system will enable the current 187 strong customer service workforce to access data, this change will not affect service users.</p> <p>It will cost £327,000 per year to purchase Microsoft Dynamics.</p>
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### 1.2 Who will the proposal have the potential to affect?

<input checked="" type="checkbox"/> Bristol City Council workforce	<input checked="" type="checkbox"/> Service users	<input type="checkbox"/> The wider community
<input type="checkbox"/> Commissioned services	<input type="checkbox"/> City partners / Stakeholder organisations	
Additional comments:		

### 1.3 Will the proposal have an equality impact?

Could the proposal affect access levels of representation or participation in a service, or does it have the potential to change e.g. quality of life: health, education, or standard of living etc.?

If 'No' explain why you are sure there will be no equality impact, then skip steps 2-4 and request review by Equality and Inclusion Team.

If 'Yes' complete the rest of this assessment, or if you plan to complete the assessment at a later stage please state this clearly here and request review by the Equality and Inclusion Team.

Yes       No      [please select]

The MS Dynamics system is used at the Customer Services Centre (CSC) and Citizen Service Point (CSP). The CRM system stores Contacts (i.e., Citizens contact information not Business contact). It also stores Voice activities, email activities as well as what is referred to as Dynamics 365 CE Case record. The Dynamics 365 CE case record is really the customer transaction footprint i.e., it contains just the details of the customers transaction and not the specific case details which would be stored in a specific business system.

A D365 CE Portal for Citizen Services has also been deployed. This portal contains the public facing Waste forms, as deployed through IT Transformation Programme's engagement through Microsoft and Hitachi.

Those public facing forms integrate via Azure Integration Services to Bristol Waste Alloy (Waste Asset and Case management system).

The contact information is extracted into Dynamic Access Provider (DAP) and matched using the CIVICA (name of company) Master Data Management (MDM) tool to create a citizen view for customer service advisors.

It should also be noted that contacts are created either by direct telephone communication to a CSC operative, creating the contacts manually (e.g., in the CSP) or by Citizens supplying their contact information online using Azure AD (Database infrastructure) B2C integrated to D365 CE contact. This change has no impact for service users.

This has been in use for over a year within the CSC and CSP with no reported issues with the various Assistive Technology products used by disabled staff. We do not perceive there to be an impact on staff or service users, and we will put measures in place to ensure that roll out will not adversely affect the disabled workforce.

Before rolling out the new software we will undertake user testing with the disabled employees who use the software to iron out any issues they may unexpectedly experience, focusing on assistive technology. 10.7% of the BCC workforce have declared they have disability, and a potential 18.7 % who have said they would prefer not to say or is unknown. Training will be undertaken for those who request or need to be trained.

This is an existing agreement with no known issues reported to IT Services.

### Step 5: Review

The Equality and Inclusion Team need at least five working days to comment and feedback on your EqIA. EqIAs should only be marked as reviewed when they provide sufficient information for decision-makers on the equalities

impact of the proposal. Please seek feedback and review from the Equality and Inclusion Team before requesting sign off from your Director<sup>1</sup>.

<b>Equality and Inclusion Team Review:</b> <i>Reviewed by Equality and Inclusion Team</i>	<b>Director Sign-Off:</b>
Date: 13/8/2021	Date:

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<sup>1</sup> Review by the Equality and Inclusion Team confirms there is sufficient analysis for decision makers to consider the likely equality impacts at this stage. This is not an endorsement or approval of the proposal.