

Equality Impact Assessment [version 2.12]



Title: Re-procurement of Microsoft Dynamics Contract 2024-2029	
<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: Rizwan Tariq
Service Area: Citizen Services	Lead Officer role: Head of Citizen Services

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 \(EqIA\) \(sharepoint.com\)](#).

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.

The proposal is to retender the Microsoft Dynamics system so that it can be continued to be used by staff within Citizen Services and selected service area (back office) teams where citizen contact is handled through the Citizen Service Centre and Citizen Service Point.

Microsoft Dynamics is needed to ensure that Bristol City Council staff can access customer records from one place as opposed to numerous lines of business systems and databases. For the period April 2022 to March 2023, Citizen Services received 920,927 enquires through telephone, web, face to face and email, records were either added or accessed by advisors at first point of contact for each contact made by service users. Without this system, advisors will now be able to provide a holistic service to service users leading to silo working.

The original Microsoft Dynamics implementation was through the Digital Transformation Programme, retendering and putting in place a new contract for Microsoft Dynamics will not affect service users.

It will cost £331,600 per year to purchase Microsoft Dynamics

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.

<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	[please select]
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The Microsoft Dynamics system is used by advisors in the Citizen Services Centre (CSC) and Citizen Services Point (CSP). The system stores contacts (i.e., citizen contact information), 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 citizen transaction footprint i.e., it contains just the details of the citizen transaction and not the specific case details which are stored in the line of business system for each service.

A D365 CS Portal for Citizen Services was also deployed previously. This portal contains the public facing Waste forms, as deployed through IT Transformation Programmes engagement through Microsoft and Hitachi. These public facing forms integrate via Azure Integration Services to Bristol Waste Alloy (Bristol Waste's asset and case management system).

The contact information is extracted into Dynamics Access provider (DAP) and matched using the Civica (name of company) Master Data Management (MDM) tool to create a citizen view for Citizen Service advisors.

It should be noted that contacts are created either by direct telephone communication to a CSC advisor, 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 is already in place and will not impact service users.**

Microsoft Dynamics has been in use in Citizen Services since 2019/20 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 will put measures in place to ensure there are no adverse effects on Disabled colleagues.

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 Director¹.

Equality and Inclusion Team Review: <i>Reviewed by Equality and Inclusion Team</i>	Director Sign-Off: Tim Borrett, Director: Policy, Strategy and Digital
Date: 1/9/2023	Date: 18/9/2023

¹ 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.