

Equality Impact Assessment (EqIA) Proforma

APPENDIX 3

Equality Impact Assessment (EqIA) Proforma

An EqIA is a tool to assess whether a decision, policy, service or function pays 'due regard' to the Public Sector Equality Duty (PSED).

This Duty requires public bodies to:

- Eliminate discrimination
- Advance equality of opportunity
- Foster good relations

The Equality Duty covers the following **9 protected characteristics**:

Age, disability, gender reassignment, pregnancy and maternity, race, religion or belief, sex, sexual orientation, marriage and civil partnership. In addition, this EqIA process includes; **care experience, rurality, socio-economic status** and the **armed forces community**.

The EqIA process has two stages:

- **Screening EqIA:** This checks whether a decision, policy, service or function pays due regard to the Equality Duty; to provide any high-level advice or take immediate action; to determine if a full EqIA is required.
- **Full EqIA:** Sometimes called Equality Analysis, this looks at a decision, policy, service or function with supporting data, information, research and evidence from consultation/engagement. The EIA covers the nine protected characteristics as well as rurality, socio-economic status, care experience and armed forces personnel/ veterans. A full EqIA includes an action plan.

Where an EqIA relates to a Council Member Decision it should be included as an appendix to the committee report.

Equality Impact Assessment – Screening

1) Decision/Policy/Service/Function

EIA Proforma

Decision : Agreement of Westmorland and Furness Customer Strategy 2024 - 2027.

2) Background and summary of Equality Advice

Cabinet is being asked to agree a Customer Strategy. This equality impact assessment screening has been undertaken to consider if a full EqIA is required at strategy level. Following the screening exercise a full EqIA is not required. The rationale and findings are set out below

The Customer Strategy has three key outcomes (listed below). The equality impacts of these three priorities are explored in this equality impact assessment.

Outcome 1: Create a better **customer experience** by delivering customer-focused, accessible and inclusive easy to use services.

We will:

- Develop a customer charter and implement service standards to ensure a high quality customer experience, being clear about what customers can and cannot expect
- Implement a multi-channel plan for how we will develop each of the key channels that customers use (website, face to face contact, telephone) and over time explore the potential use of additional channels such as chat bots, assisted chat and social media
- Develop our website offering to enable customers to self-serve for as many services as possible, so it is possible to book, pay, tell, apply, check and register for services at time that suits them
- Invest in our physical face to face customer offer so that it is of high quality, with assistance offered to support customers who want to self-serve in these spaces, whilst also offering meaningful, value added conversations in person
- Ensure Council information and services are easy to find, understand and access by all of our customers, with a commitment to working with individuals and groups to tackle any barriers
- Further explore the future requirements of a customer relationship management system and a “customer account function” with a clear plan for delivery
- Develop an organisational approach to user centred service design to provide teams with tools and guidance on how they can involve customers in the design of services so that these are well suited to their needs and preferences
- Further develop our approach to customer data, intelligence and insight, to make sure we gather and use a wide range of customer data to better inform service design and delivery, including the need to draw from lived experience and feedback received

- Redesign priority services and put in place a rolling programme of services, which will undergo a level of re-design from a customer perspective. The focus will be to improve the customer experience and increase value for money where possible. We will be focusing on services in the council's priority programmes
- Be honest with customers when things do not go to plan or performance is not to the standards we aim for, committing resources to rectify the issue as soon as possible
- Explore how our customer access channels can connect with the wide range of community led networks, groups and places so that our customers can easily get to the information or service they need through these routes
- Adapt and keep under review our approach to customer experience to compliment and support our new and emerging community power work, which is exploring and developing our relationship with our communities

Outcome 2: Create a **customer centric culture** and new more efficient ways of working

We will:

- Encourage and develop a customer focused culture, putting in place staff training, best practice sharing and development opportunities
- Implement health, safety and wellbeing initiatives to promote positive working between employees and customers, with an unreasonable customer policy in place should it be required by exception
- Support Councillors in their role, by providing them with the information and tools they need to support our customers to access council services
- Work with Councillors, MPs, Parish and Town Councils to support people to access Council and partner services in the most effective ways
- Ensure customer service staff utilise and develop their expertise to advise on partner and community led services that could be of use to our customers
- Ensure that Council services provided by our partners on our behalf and commissioned services have the same dedication to a customer focused approach
- Encourage a learning culture, where customer feedback is valued and used to make improvements to council services

Outcome 3: Deliver **effective, efficient and value for money** customer service

We will:

- Establish a single customer service centre to deal with all digital transactions and telephone enquiries resolving as much as possible by a single customer service team. Complex cases will be triaged into service delivery teams for further support
- Apply agreed design principles and guidelines to ensure a consistent approach to customer contact across the organisation. The design principles and guidelines will be applied for each council service, in the most appropriate way, using customer journey mapping, data, intelligence, evidence and insights to ensure the customer access route put in place best meets the needs of the customer
- Develop our self-service customer offer, maximising new technologies to facilitate simple and cost effective access to services in a way that enables customers to do things in a way and at a time that best suits them

3) Consultation

Engagement sessions have taken place with the following groups and stakeholders to gain feedback and ideas on approach to development of the Customer Strategy and its content:

Corporate Management Team (CMT), Senior Leadership Team (SLT), Recognised Trade Unions, Change Champions, Cabinet, Corporate, Service Leads and Customer Service Leads, Overview and Scrutiny Committee, all councillors, VCFS and Advocacy Groups including Parish and Town Council representatives, Poverty Working Group,

4) Equality screening

Equality protected characteristic	Impact Y/N	Describe impact (if Yes)	Measures to address impact (if Yes)	Full EqIA needed Y/N
Age	Positive Y Neutral Y Adverse N	Create a better customer experience <i>Potential positive impacts –</i>	Ensure all age groups are considered when developing and implementing Customer Strategy, as well as its aims and objectives.	N

Equality protected characteristic	Impact Y/N	Describe impact (if Yes)	Measures to address impact (if Yes)	Full EqIA needed Y/N
		<p>Developing a multi-channel plan on how we interact with our customers will ensure that we can connect with our customers in a way that is suitable most for them.</p> <p>Some older adults may find accessing a digital offer challenging, therefore a multi-channel approach will support all age groups, improving access to the Council no matter how people decide to interact with us.</p> <p>Adverse impacts – n/a</p> <p>Create customer centric culture</p> <p>Adverse impacts – n/a</p> <p>Deliver effective, efficient and value for money customer service</p> <p>Adverse impacts – n/a</p>	<p>Support digital capability where needed.</p> <p>Ensure people can contact us via multiple channels – online, digital, telephone.</p> <p>Ensure any Customer Strategy workstreams / policies / projects / solutions are considerate of age and undertake an Eqia where needed.</p>	
Disability	Positive Y Neutral Y Adverse N	<p>Create a better customer experience</p> <p><i>Potential positive impacts –</i></p> <p>Developing a multi-channel plan on how we interact with our customers will ensure that we can connect with</p>	<p>Ensure all disabilities are considered when developing and implementing Customer Strategy, as well as its aims and objectives.</p> <p>Ensure Council buildings are fully accessible.</p>	N

Equality protected characteristic	Impact Y/N	Describe impact (if Yes)	Measures to address impact (if Yes)	Full EqIA needed Y/N
		<p>our customers in a way that is most suitable for them.</p> <p>Improving both our digital and face to face offer could introduce new ways for customers to interact with us that could improve access to Council services for our customers with a disability.</p> <p>Adverse impacts – n/a</p> <p>Create a customer centric culture</p> <p>Adverse impacts – n/a</p> <p>Deliver effective, efficient and value for money customer service</p> <p>Adverse impacts – n/a</p>	<p>Explore most inclusive way to develop our digital offer.</p> <p>Ensure any Customer Strategy workstreams / policies / projects / solutions are considerate of all disabilities and undertake an Eqia where needed.</p>	
Gender reassignment	Neutral Y Adverse N	<p>Create a better customer experience</p> <p>Adverse impacts – n/a</p> <p>Create a customer centric culture</p> <p>Adverse impacts – n/a</p> <p>Deliver effective, efficient and value for money customer service</p>	<p>Ensure gender reassignment is considered when developing and implementing Customer Strategy, as well as its aims and objectives.</p> <p>Consider language/reference to individuals in documents.</p> <p>Ensure any Customer Strategy workstreams / policies / projects /</p>	N

Equality protected characteristic	Impact Y/N	Describe impact (if Yes)	Measures to address impact (if Yes)	Full EqIA needed Y/N
		Adverse impacts – n/a	solutions are considerate of gender reassignment and undertake an Eqia where needed.	
Marriage or civil partnership	Neutral Y Adverse N	<p>Create a better customer experience</p> <p>Adverse impacts – n/a</p> <p>Create a customer centric culture</p> <p>Adverse impacts – n/a</p> <p>Deliver effective, efficient and value for money customer service</p> <p>Adverse impacts – n/a</p>	<p>Ensure marriage or civil partnership is considered when developing and implementing Customer Strategy, as well as its aims and objectives.</p> <p>Ensure any Customer Strategy workstreams / policies / projects / solutions are considerate of marriage or civil partnership and undertake an Eqia where needed.</p>	N
Pregnancy or maternity	Neutral Y Adverse N	<p>Create a better customer experience</p> <p>Adverse impacts – n/a</p> <p>Create a customer centric culture</p> <p>Adverse impacts – n/a</p> <p>Deliver effective, efficient and value for money customer service</p> <p>Adverse impacts – n/a</p>	<p>Ensure Pregnancy or maternity is considered when developing and implementing Customer Strategy, as well as its aims and objectives.</p> <p>Ensure any Customer Strategy workstreams / policies / projects / solutions are considerate of pregnancy or maternity and undertake an Eqia where needed.</p>	N

Equality protected characteristic	Impact Y/N	Describe impact (if Yes)	Measures to address impact (if Yes)	Full EqIA needed Y/N
Race	Positive Y Neutral Y Adverse N	<p>Create a better customer experience</p> <p><i>Potential positive impacts –</i></p> <p>Developing a multi-channel plan on how we interact with our customers will ensure that we can connect with our customers in a way that is most suitable for them.</p> <p>Improving both our digital and face to face offer could introduce new ways for customers to interact with us that could improve access to Council services for our customers where English is not their first language.</p> <p>Adverse impacts – n/a</p> <p>Create a customer centric culture</p> <p>Adverse impacts – n/a</p> <p>Deliver effective, efficient and value for money customer service</p> <p>Adverse impacts – n/a</p>	<p>Ensure race is considered when developing and implementing Customer Strategy, as well as its aims and objectives.</p> <p>Explore language interpretation and translation where required.</p> <p>Ensure any Customer Strategy workstreams / policies / projects / solutions are considerate of race and undertake an Eqia where needed.</p>	N
Religion or belief	Neutral Y Adverse N	<p>Create a better customer experience</p>	<p>Ensure religion or belief is considered when developing and</p>	N

Equality protected characteristic	Impact Y/N	Describe impact (if Yes)	Measures to address impact (if Yes)	Full EqIA needed Y/N
		<p>Adverse impacts – n/a</p> <p>Create a customer centric culture</p> <p>Adverse impacts – n/a</p> <p>Deliver effective, efficient and value for money customer service</p> <p>Adverse impacts – n/a</p>	<p>implementing Customer Strategy, as well as its aims and objectives.</p> <p>Ensure any Customer Strategy workstreams / policies / projects / solutions are considerate of religion or belief and undertake an Eqia where needed</p>	
Sex	Neutral Y Adverse N	<p>Create a better customer experience</p> <p>Adverse impacts – n/a</p> <p>Create a customer centric culture</p> <p>Adverse impacts – n/a</p> <p>Deliver effective, efficient and value for money customer service</p> <p>Adverse impacts – n/a</p>	<p>Ensure sex is considered when developing and implementing Customer Strategy, as well as its aims and objectives.</p> <p>Consider language/reference to individuals in documents.</p> <p>Ensure any Customer Strategy workstreams / policies / projects / solutions are considerate of sex and undertake an Eqia where needed</p>	N
Sexual orientation	Neutral Y Adverse N	<p>Create a better customer experience</p> <p>Adverse impacts – n/a</p> <p>Create a customer centric culture</p>	<p>Ensure sexual orientation is considered when developing and implementing Customer Strategy, as well as its aims and objectives.</p>	N

Equality protected characteristic	Impact Y/N	Describe impact (if Yes)	Measures to address impact (if Yes)	Full EqIA needed Y/N
		Adverse impacts – n/a Deliver effective, efficient and value for money customer service Adverse impacts – n/a	Ensure any Customer Strategy workstreams / policies / projects / solutions are considerate of sexual orientation and undertake an Eqia where needed	
Care Experience	Neutral Y Adverse N	Create a better customer experience Adverse impacts – n/a Create a customer centric culture Adverse impacts – n/a Deliver effective, efficient and value for money customer service Adverse impacts – n/a	Ensure care experience is considered when developing and implementing Customer Strategy, as well as its aims and objectives. Consider language/reference to individuals in documents. Ensure any Customer Strategy workstreams / policies / projects / solutions are considerate of care experience and undertake an Eqia where needed	N
People in rural areas	Positive Y Neutral Y Adverse N	Create a better customer experience <i>Potential positive impacts –</i> Developing a multi-channel plan on how we interact with our customers will ensure that we can connect with	Ensure the experience of those people in rural areas is considered when developing and implementing Customer Strategy, as well as its aims and objectives	N

Equality protected characteristic	Impact Y/N	Describe impact (if Yes)	Measures to address impact (if Yes)	Full EqIA needed Y/N
		<p>our customers in a way that is suitable most for them.</p> <p>Some people in rural areas may have barriers to accessing digital connection and/or transport, therefore a multi-channel approach will support access no matter how people decide to interact with us.</p> <p>Adverse impacts – n/a</p> <p>Create a customer centric culture</p> <p>Adverse impacts – n/a</p> <p>Deliver effective, efficient and value for money customer service</p> <p>Adverse impacts – n/a</p>	<p>Ensure alternative routes of engagement for those with limited/no ICT access.</p> <p>Ensure people can contact us via multiple channels – online, digital, telephone.</p> <p>Ensure any Customer Strategy workstreams / policies / projects / solutions are considerate of people in rural areas and undertake an Eqia where needed</p>	
Socio-economic inequality	Positive Y Neutral Y Adverse N	<p>Create a better customer experience</p> <p><i>Potential positive impacts –</i></p> <p>Developing a multi-channel plan on how we interact with our customers will ensure that we can connect with our customers in a way that is suitable most for them.</p>	<p>Ensure socio-economic inequalities are considered when developing and implementing Customer Strategy, as well as its aims and objectives</p> <p>Ensure alternative routes of engagement for those with limited/no ICT access.</p>	N

Equality protected characteristic	Impact Y/N	Describe impact (if Yes)	Measures to address impact (if Yes)	Full EqIA needed Y/N
		<p>Challenges brought by social-economic inequality can restrict how customers are able to interact with us as they are unable to afford transport or digital connectivity. Therefore, a multi-channel approach will support access no matter how people need to interact with us.</p> <p>Adverse impacts – n/a</p> <p>Create a customer centric culture</p> <p>Adverse impacts – n/a</p> <p>Deliver effective, efficient and value for money customer service</p> <p>Adverse impacts – n/a</p>	<p>Support digital capability where needed.</p> <p>Ensure people can contact us via multiple channels – online, digital, telephone.</p> <p>Ensure any Customer Strategy workstreams / policies / projects / solutions are considerate socio-economic inequalities and undertake an Eqia where needed</p>	
Armed-forces personnel/veterans	Neutral Y Adverse N	<p>Create a better customer experience</p> <p>Adverse impacts – n/a</p> <p>Create a customer centric culture</p> <p>Adverse impacts – n/a</p> <p>Deliver effective, efficient and value for money customer service</p>	<p>Ensure armed forces personnel/veterans are considered when developing and implementing Customer Strategy, as well as its aims and objectives</p> <p>Ensure any Customer Strategy workstreams / policies / projects / solutions are considerate armed forces personnel/veterans and undertake an Eqia where needed</p>	N

Equality protected characteristic	Impact Y/N	Describe impact (if Yes)	Measures to address impact (if Yes)	Full EqIA needed Y/N
		Adverse impacts – n/a		
General (other considerations)				

5) Full EqIA required (evidence of substantial impact)?

No