

EQUALITY IMPACT ASSESSMENT TEMPLATE - TRAFFORD COUNCIL

A. Summary Details		
1	Title of EIA:	Customer Strategy
2	Person responsible for the assessment:	Sarah Curran – Acting Head of Customer Service
3	Contact details:	sarah.curran@trafford.gov.uk 912 2823
4	Section & Directorate:	T & R
5	Name and roles of other officers involved in the EIA, if applicable:	Stephen Gannon – Business Change Manager Tina Colquhoun – Business Change Support Officer

B. Policy or Function		
1	Is this EIA for a policy or function?	Policy <input checked="" type="checkbox"/> Function <input type="checkbox"/>
2	Is this EIA for a new or existing policy or function?	New <input checked="" type="checkbox"/> Existing <input type="checkbox"/> Change to an existing policy or function <input type="checkbox"/>
3	What is the main purpose of the policy/function?	<ul style="list-style-type: none"> • The Customer Strategy will set out how and why the Council interacts with customers and the principles these interactions are based on • It will propose how we manage the current and future needs and expectations of our customers • It will present solutions to drive efficiencies through process and service redesign • It will address how customer services can be improved across

		the Council (internally, externally and with partners) as a means to improve the customer experience	
4	Is the policy/function associated with any other policies of the Authority?	Digital Strategy Information and Advice Review Complaints Policy Telephone Policy Trafford Council Vision 2015 Welfare Reform changes Partnership working	
5	Do any written procedures exist to enable delivery of this policy/function?	Detailed action / delivery plans for each policy named above are available	
6	Are there elements of common practice not clearly defined within the written procedures? If yes, please state.	No	
7	Who are the main stakeholders of the policy? How are they expected to benefit?	Trafford external customers including: <ul style="list-style-type: none"> • Residents • Visitors • Businesses 	<ul style="list-style-type: none"> • Improved experience when contacting the Council • Improved response to complaints • Improved access to online services and greater ability to self help

		<p>Trafford internal customers</p> <ul style="list-style-type: none"> • Members • Employees • Agency / contract staff <p>Partners Trafford Information Network Voice of BME, Disability Advisory group, Deaf Partnership, Housing Associations, etc.</p>	<ul style="list-style-type: none"> • Greater intelligence around how customers use services • Improved process for recording & reporting on feedback and complaints • Greater collaboration opportunities by working together to understand customer requirements and support communities
8	How will the policy/function (or change / improvement), be implemented?	The Customer Strategy is a documented programme of work which is based on evidence from customer consultation findings. There is an implementation plan from Autumn 2013 to Summer 2014.	
9	What factors could contribute or detract from achieving these outcomes for service users?	<ul style="list-style-type: none"> • Reluctance of customers to use online services (channel shift) • Review of Council Services via the New Operating Model may impact on how services are delivered in the future • Funding and future staffing levels • Funding for staff training and development • Funding for training programmes such as “Go on Gold” • Reliance on services such as ICT to fulfil requirements 	
10	Is the responsibility for the proposed policy or function shared with another department or authority or organisation? If so, please state?	The responsibility for implementing the Strategy will be shared across the whole Council	

C. Data Collection		
1	What monitoring data do you have on the number of people (from different equality groups) who are using or are potentially impacted upon by your policy/ function?	Research was conducted with a number of Trafford customers as part of the information gathering phase. Monitoring information around gender, age, ethnicity and disability was obtained. In addition a consultation exercise was carried out which provides demographic information which supports the case for change.
2	Please specify monitoring information you have available and attach relevant information*	<p>Please see Appendix 1 for the monitoring information from customers contacted as part of the customer engagement exercises.</p> <p>The Council's Performance and Partnership team uses the Information Trafford system which contains demographic and equality and diversity information from a variety of data sources.</p> <p>In terms of wider Trafford monitoring data, there is information around the borough as a whole from Acorn</p>
3	If monitoring has NOT been undertaken, will it be done in the future or do you have access to relevant monitoring data?	<p>Continuous performance management and monitoring will take place.</p> <p>As part of the Customer Strategy consultation, data capture took place of those customers who wish to be involved in further customer strategy forums and surveys.</p>

**Your monitoring information should be compared to the current available census data to see whether a proportionate number of people are taking up your service*

D. Consultation & Involvement		
1	Are you using information from any previous consultations and/or local/national consultations, research or practical guidance that will assist you in completing this EIA?	<p>Research was conducted via a consultation with a number of Trafford customers as part of the information gathering phase. A total of 484 customers responded to the questionnaires.</p> <p>A separate exercise was carried out with individual members of staff being asked to comment on their experience as customers and there were 160 responses.</p> <p>A third data capture exercise obtained information from staff teams in how they interact with customers – 66 team surveys were received.</p>
2	Please list any consultations planned, methods used and groups you plan to target. (If applicable)	<p>The Customer Strategy was then subject to a public consultation of 30 days from 2nd July 2013.</p> <p>The consultation was via the website and via paper copies in libraries. An email address was available for customers to ask specific questions.</p> <p>The consultation received over 200 responses – the results of this can be seen in the post consultation report.</p>
3	**What barriers, if any, exist to effective consultation with these groups and how will you overcome them?	<p>The Councils Equality and Diversity team gained feedback from the Disability Advisory group, Deaf Partnership group as part of the consultation and this feedback was incorporated into the final Strategy</p>

***It is important to consider all available information that could help determine whether the policy/ function could have any potential adverse impact. Please attach examples of available research and consultation reports*

E: The Impact – Identify the potential impact of the policy/function on different equality target groups

The potential impact could be negative, positive or neutral. If you have assessed negative potential impact for any of the target groups you will also need to assess whether that negative potential impact is high, medium or low

	Positive	Negative (please specify if High, Medium or Low)	Neutral	Reason
Gender – both men and women, and transgender;			✓	
Pregnant women & women on maternity leave			✓	
Gender Reassignment			✓	
Marriage & Civil Partnership			✓	
Race- include race, nationality & ethnicity (NB: the experiences may be different for different groups)			✓	
Disability – physical, sensory & mental impairments	✓			Go on gold training to support people with Information Technology / website training
Age Group - specify eg; older, younger etc)	✓			Go on gold training to support people with Information Technology / website training
Sexual Orientation – Heterosexual, Lesbian, Gay			✓	

Men, Bisexual people				
Religious/Faith groups (specify)			✓	

As a result of completing the above what is the potential negative impact of your policy?

High

Medium

Low x

F. Could you minimise or remove any negative potential impact? If yes, explain how.	
Race:	N/A The proposals should not have a negative potential impact on any specific group.
Gender, including pregnancy & maternity, gender reassignment, marriage & civil partnership	N/A The proposals should not have a negative potential impact on any specific group.
Disability:	N/A The proposals should not have a negative potential impact on any specific group.
Age:	N/A The proposals should not have a negative potential impact on any specific group.
Sexual Orientation:	N/A The proposals should not have a negative potential impact on any specific group.
Religious/Faith groups:	N/A The proposals should not have a negative potential impact on any specific group.
Also consider the following:	
1	If there is an adverse impact, can it be justified on the grounds of promoting equality of opportunity for a particular equality group or for another legitimate reason? N/A
2	Could the policy have an adverse impact on relations between different groups? N/A
3	If there is no evidence that the policy <i>promotes</i> N/A

equal opportunity, could it be adapted so that it does? If yes, how?

G. EIA Action Plan

Recommendation	Key activity	When	Officer Responsible	Links to other Plans eg; Sustainable Community Strategy, Corporate Plan, Business Plan,	Progress milestones	Progress
Customer Engagement and research activities	<ul style="list-style-type: none"> • Focus Groups • Questionnaires • Staff 	April 2013	S Curran	Information and Advice review		Completed
Complaints process review	<ul style="list-style-type: none"> • Focus Groups • Questionnaires • Staff 	April 2013	S Gannon	Customer strategy project		Completed
Strategy development	<ul style="list-style-type: none"> • Focus group • Executive draft approval 	May 2013	S Curran	Communications review		Completed
CRM specification ready for approval	<ul style="list-style-type: none"> • Market testing • Requirements specification 	June – September 2013	R Hafezji			Ongoing

	<ul style="list-style-type: none"> • Mapping processes with teams / services 					
Strategy ready for consultation	<ul style="list-style-type: none"> • Strategy in draft form • Survey via Survey Monkey and libraries 	June 2013	S Curran			Completed
Strategy approved	<ul style="list-style-type: none"> • Executive approval 	September 2013	S Curran			Planned
Implementation programme starts	<ul style="list-style-type: none"> • Launched using comms and marketing • Continuous monitoring of performance 	1 st October 2013	S Curran			Planned

Please ensure that all actions identified are included in the attached action plan and in your service plan.

Signed *Sarah Curran*
Lead Officer Sarah Curran
Date 3rd September 2013

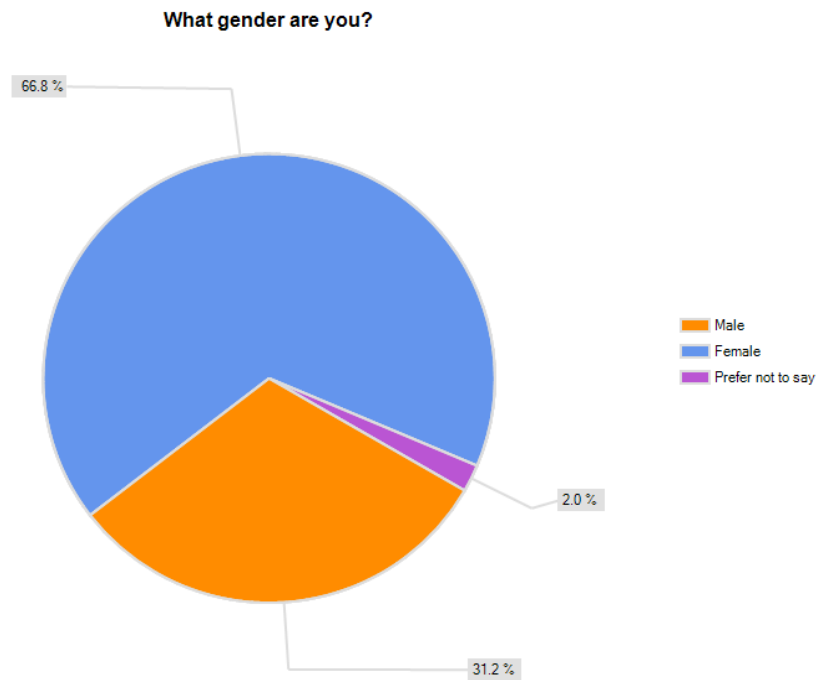
Signed
Service Head
Date

Appendix 1

Monitoring Data from customer engagement exercises – focus groups and questionnaires

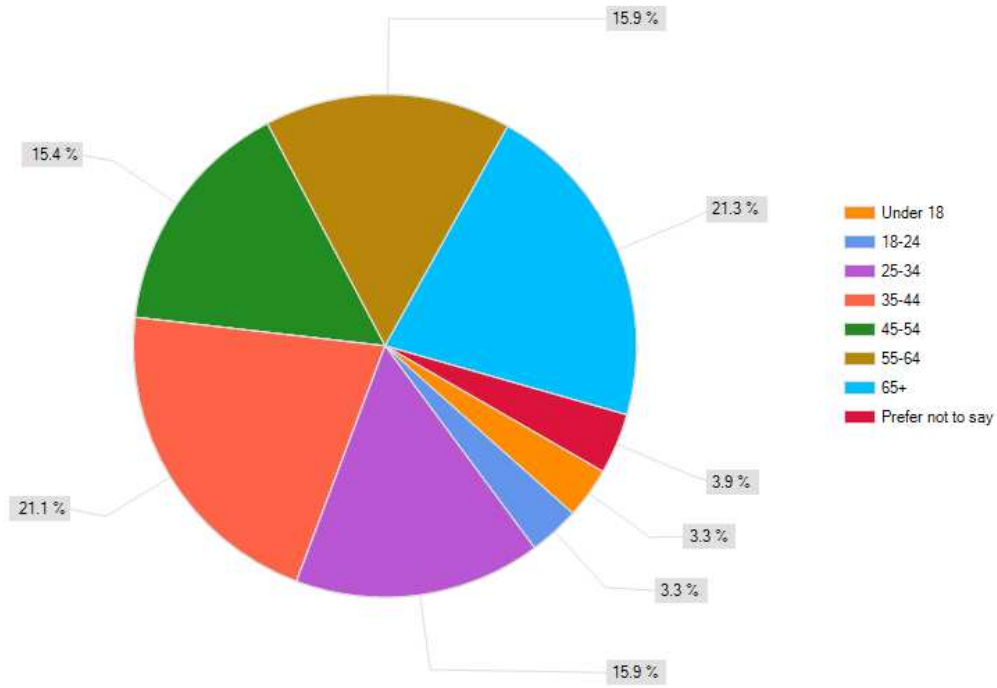
A total of 484 customers took part in the engagement exercise. Staff visited a variety of Council and partner locations and asked groups of customers for their experiences. In addition customers phoning the Contact Centre and visiting libraries were asked to complete the questionnaire

Gender



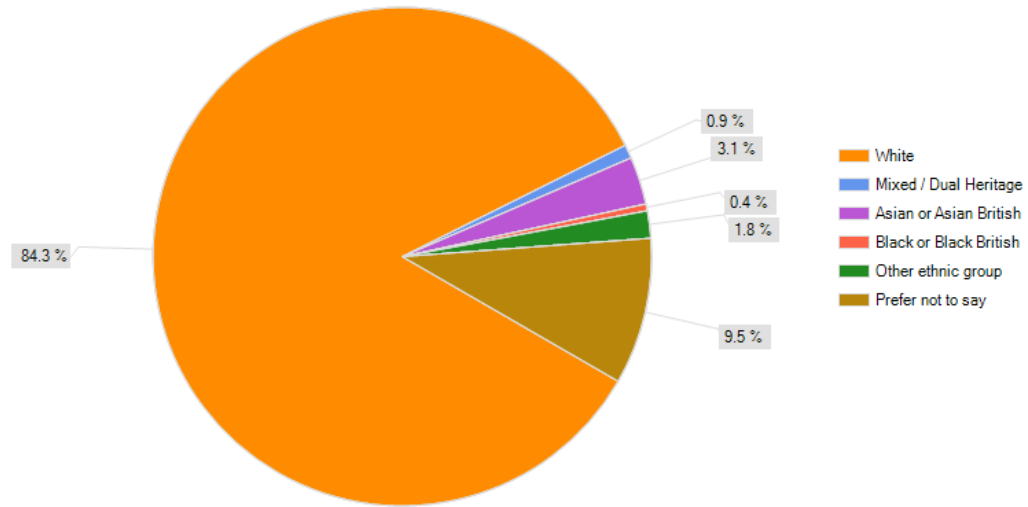
Age

Which age range are you in?



Ethnicity

How would you describe your ethnic group?



Disability

The Equality Act 2010 considers that you are disabled if you have a physical or mental impairment which has a long term and substantial adverse effect on your ability to carry out normal day-to-day activities. Do you consider yourself to be disabled?

