

Equality Impact Assessment (EqIA)

1. Initial information

Name of the policy, project, strategy, project or service being assessed:

Enterprise Planning Resource Platform Procurement

2. Is this a (please delete those not required):

New project

3. Is this (please delete those not required):

Internal (employees only)

External (residents, communities, partners)

Both internal and external

4. Please provide the background to this proposal?

This Outline Business Case (OBC) considers the options available to Dorset Council to transform its Enterprise Resource Planning (ERP) platform to ensure it effectively enables our future ways of working. The Outline Business Case recommends that the council refreshes our technology platform to streamline the operation of Human Resources (HR), Payroll, Finance and Procurement functions, ensuring that these services take advantage of automation and artificial intelligence to support better user experience, reduce the cost of operation and realise improved data outputs to support strategic planning and service delivery.

The Council is considering procuring and deploying a new Enterprise Resource Planning (ERP) platform to support future ways of working across core Human Resources (HR), Payroll, Finance and Procurement functions.

The IT hardware (servers) on which DES is operated will be 'end of life' in June 2027 and the SAP product itself will be end of life in December 2027 – we are proposing to move to a new ERP solution prior to both of these milestones, with a current indicative timeline suggesting we will complete the selection of the future product in the Spring of 2025. A more detailed EQIA will be conducted as part of planning the configuration of the new solution to ensure we mitigate as best we can any identified accessibility or inclusion issues.

We are currently engaged in the 'Procure and Prepare' phase, where we are getting ready for selecting our chosen solution and implementation partner. We are recommending to

Cabinet in November that a new ERP system is the best option for us to modernise our ways of working across these corporate functions, which impact on all employees and managers.

5. Please provide a brief overview of its aims and objectives:

There is a recognition that the current ERP platform is not a suitable long-term option to enable new ways of working or effectively manage technology risks, with the following drivers for change being identified through engagement with Council stakeholders.

- 1) The current solution falls out of product owner support in 2027. 'Doing Nothing' is not an option, as this would significantly increase the risk to Dorset Council and the delivery of its services if the platform were to fail.
- 2) The current solution has been highly customised to meet the needs of professional back-office teams and end users. The customisations have led to the higher workloads, just to 'keep the lights on'. The technology is not intuitive or cost effective and requires a high level of maintenance.
- 3) The current solution, and business processes are noted by the Council as being clunky, outdated, and non-intuitive. The user experience is inconsistent, with many processes being managed manually 'offline'. End to end processes are being managed across multiple systems, leading to poor customer experience, users not using systems as intended, and disjointed customer journeys.
- 4) Delays and defects identified during system updates can impact on the day to day running of business-as-usual processes.
- 5) Data and Reporting were noted to be of significant concern during SWOT workshops. Important data is being managed 'off system', manual data manipulation is leading to inefficiencies, there are inconsistencies between HR & Finance datasets and a lack of data visibility and real time reporting.
- 6) There is high alignment between the strategic drivers for ERP replacement and the '*Our Future Council*' strategic drivers. A more modern ERP, and ways of working, could be a critical enabler to the ongoing delivery of transformation activity within the Council.

The solution implementation will seek to configure and deploy the new ERP solution in such a way as to deliver streamlined internal business processes, improving the customer experience of using the solution, and reducing the costs of operation through the opportunities made possible from automation and artificial intelligence.

A key strategic driver, in line with the emerging Our Future Council programme, is to deliver a better, more intuitive customer experience – this will include delivering a more inclusive experience, whether that be by extending access to the system to those without access currently, or ensuring the accessibility of the system and the processes it supports.

Evidence gathering and engagement

6. What sources of data, evidence or research has been used for this assessment? (e.g national statistics, employee data):

In December 2023, Socitm Advisory hosted user experience SWOT (strengths, weaknesses, opportunities, and threats) workshops with the functional service areas (as outlined below) who regularly use the current platform, it is clear the current system functionality and

therefore the wider processes do not meet the strategic drivers identified for this programme. The underpinning technology of DES is an earlier generation of software, which does not easily enable an accessible and inclusive user experience.

	Finance	Procurement	HR & Payroll	Technical/IT	End Users
User Experience	X	X	X	X	X
Data & Insight	X	X	X	X	X
Efficiencies & Savings	X	X	X	X	X

7. What did this tell you?

The issues identified below are a subset of the whole, where they relate to accessibility and inclusion of the incumbent solution.

HR & Payroll

The user experience SWOT workshops explored pain points associated with the current ERP system and ways of working, and opportunities for improvement. The following outcomes for HR & Payroll are of note:

- Non-intuitive system leading to failure demand for Employee and Manager self service functions and poor user experience, leading to poor data entry and unreliable data quality.

Finance & Procurement

The user experience SWOT workshops explored pain points associated with the current ERP system and ways of working, and opportunities for improvement. The following outcomes for Finance and Procurement are of note:

- Non-intuitive system not used as intended due to complex processes
- Lack of supplier self-service

ICT Services

The user experience SWOT workshops explored pain points associated with the current ERP system and ways of working, and opportunities for improvement. The following outcomes for IT note:

- Non-intuitive user interface and lack of in system guidance
- Inconsistent access and connection for different user groups
- Manual SSO
- Customisations to old system not following best practice processes

8. Who have you engaged and consulted with as part of this assessment?

We have representatives from each of the functional areas within our Working Group.

We have representatives at Exec level from each of our Directorates on our Programme Board.

We have a selection of end users who have been invited to attend the soft market demonstrations and the requirement workshops to help feed into the tender documents.

We have presented the ERP project to Transformation Board who approved the project to move to prepare to procure stage.

We will be presenting the outline business case and covering report to cabinet (including Councillors) on the 19th November.

This assessment has also been shared with James Palfreyman-Kay (EDI lead), Pete Bartlett (Digital Business Partner and 'Disability Working Group' lead) and Emily Hasson-Chapman (Web Manager).

9. Is further information needed to help inform decision making?

We are hosting 5 soft market demos with suppliers of full ERP systems, who are presenting their products to a group of end users from each function. The demos will show us the art of the possible.

Requirement workshops will then take place to pull together a comprehensive list of what we need the new ERP system to be able to do. This will feed into the tender specification pack.

The requirements will include mandatory expectations regarding the accessibility of the solution, including WCAG 2.2. AA standard and Public Sector Accessibility Regulations.

Is an EQIA required?

Not every proposal will need an EqIA. The data and research should inform your decision whether to continue with this EqIA. If you decide that your proposal does not need an EqIA, please answer the following question:

This policy, strategy, project or service does not require a EqIA because (provide details):

This project does require an EqIA.

Assessing the impact on different groups of people

For each of the protected characteristics groups below, please explain whether your proposal could have a positive, negative, unclear or no impact. Where an impact has been identified, please explain what it is and if unclear or negative please explain what mitigating actions will be taken.

- use the evidence you have gathered to inform your decision making.
- consider impacts on residents, service users and employees separately.
- if your strategy, policy, project or service contains options you may wish to consider providing an assessment for each option.
- see guidance for more information about the different [protected characteristics](#).

Key to impacts

Positive Impact	<ul style="list-style-type: none"> • the proposal eliminates discrimination, advances equality of opportunity and/or fosters good relations with protected groups.
Negative Impact	<ul style="list-style-type: none"> • protected characteristic group(s) could be disadvantaged or discriminated against
Neutral Impact	<ul style="list-style-type: none"> • no change/ no assessed significant impact of protected characteristic groups
Unclear	<ul style="list-style-type: none"> • not enough data/evidence has been collected to make an informed decision.

The impact on protected characteristics will need to be reassessed in more detail once a system and implementation supplier is chosen, during the next stage of the programme.

Impacts on who or what?	Choose impact	How
Age	Neutral	The process is not different depending on this protected characteristic.
Disability	Positive	It is anticipated that the new solution will offer greater flexibilities regarding inclusion and accessibility for users of the system, with more inclusive user experience directly provided by the solution as well as being on technologies which will integrate with other accessibility tools more effectively.
Gender reassignment and Gender Identity	Neutral	The process is not different depending on this protected characteristic.
Marriage or civil partnership	Neutral	The process is not different depending on this protected characteristic.

Impacts on who or what?	Choose impact	How
Pregnancy and maternity	Neutral	The process is not different depending on this protected characteristic.
Race and Ethnicity	Neutral	The process is not different depending on this protected characteristic.
Religion and belief	Neutral	The process is not different depending on this protected characteristic.
Sex (consider men and women)	Neutral	The process is not different depending on this protected characteristic.
Sexual orientation	Neutral	The process is not different depending on this protected characteristic.
People with caring responsibilities	Neutral	The process is not different depending on this protected characteristic.
Rural isolation	Neutral	The process is not different depending on this protected characteristic.
Socio-economic deprivation	Neutral	The process is not different depending on this protected characteristic.
Single parents	Neutral	The process is not different depending on this protected characteristic.
Armed forces communities	Neutral	The process is not different depending on this protected characteristic.

Please provide a summary of the impacts:

As we have not chosen a particular supplier and system implementer yet, we are in the prepare to procure stage, we cannot identify if the new ERP will have a positive or negative impact on protected characteristics.

However, with the advancement in technology since we implemented our current ERP system, we believe the new solution will offer a positive impact for employees with a disability. It will have more flexibility regards inclusion and accessibility for users of the system, with more inclusive user experience directly provided by the solution as well as being on technologies which will integrate with other accessibility tools more effectively.

Once we have awarded a contract and understand how the new ERP operates, we will review this EqIA as we'll be more aware of how the new platform will impact each of the protected characteristics.

Action Plan

Summarise any actions required as a result of this EqIA.

Issue	Action to be taken	Person(s) responsible	Date to be completed by
1	Review the EqIA to ensure it remains up to date once a supplier and system implementor has been chosen.	Diane Frake/Steve Stone	30/06/2025

Sign Off

Officer completing this EqIA: **Diane Frake, James Ailward**

Officers involved in completing the EqIA: **Diane Frake, Steve Stone, James Ailward**

Date of completion: **23rd October 2024**

Version Number: **V0.1**

EqIA review date: **30th May 2025**

Equality Lead Sign Off:

Next Steps:

- the EqIA will be reviewed by Communications and Engagement and if in agreement, your EqIA will be signed off.
- if not, we will get in touch to chat further about the EqIA, to get a better understanding.
- EqIA authors are responsible to ensuring any actions in the action plan are implemented.

Please send to [Diversity and Inclusion Officer](#)