



## **POLICY AND RESOURCES SCRUTINY COMMITTEE – 28TH MAY 2019**

**SUBJECT: PRINCIPLES ON IMPLEMENTATION OF O365**

**REPORT BY: CORPORATE DIRECTOR EDUCATION & CORPORATE SERVICES**

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### **1. PURPOSE OF REPORT**

- 1.1 To present to the Committee the principles on implementation of the Office 365 solution for Caerphilly. To seek the views of Members on the principles before its onward submission to Cabinet.

### **2. SUMMARY**

- 2.1 In line with the Council's Customer & Digital Strategy, we have been investigating the implementation of the latest version of the Microsoft Office 365 (O365) suite of tools.
- 2.2 These tools offer an extended suite of productivity and collaboration tools over the current Microsoft Office suite. The committee will be familiar with tools such as Word, Excel, PowerPoint and Outlook. O365 supplements these tools with further tools to manage team collaboration, digital teleconferencing and team planning. We believe these tools will assist with everyday challenges and barriers that officials have in working effectively, efficiently and collaboratively in the current systems environment. The introduction of the new product range will support the proposed Customer and Digital Strategy and the wider transformation strategy.
- 2.3 The implementation of this suite of tools will need to be formally managed with a focus on both activation of the technology solutions and also ensuring adoption of these solutions by officers across the Council. This will need to include showing the benefits of new ways of working that the tools will enable. There are many scenarios where we believe these benefits will show themselves – for example in co-authoring and document collaboration, team and cross departmental collaboration, structured to knowledge management, enabling further mobility and agile working, and running more effective meetings. There will also be benefits for the IT organisation in both cost reduction and simplification through rationalisation of products across the Authority.
- 2.4 The move of Microsoft to a subscription based licensing model reflects the current trends of software vendors and necessitates the implementation of O365. The changes in Microsoft licensing restricts the purchase of perpetual licenses, removing previously agreed Governmental discounts for such licenses.

### **3. RECOMMENDATIONS**

- 3.1 Members of the Scrutiny Committee are asked to consider and comment on the proposed principles on the implementation of O365 prior to its submission to Cabinet for endorsement. The principles are within Appendix 1.

#### **4. REASONS FOR THE RECOMMENDATIONS**

- 4.1 To ensure that the views of the Scrutiny Committee are considered prior to the proposed principles on implementation of O365 being presented to Cabinet.
- 4.2 The continued use of familiar applications such as Outlook, Word and Excel to aid productivity across the Authority combined with the introduction of new applications to support an agile workforce through collaboration, effective team working and accessibility to information.

#### **5. THE REPORT**

- 5.1 The appended principles has been under development since January 2019. Staff and key Officers have been instrumental in its development.
- 5.2 The principles attempt to outline our key principles on the following topics:
  - Reason for selecting O365
  - Acquisition approach
  - Implementation and activation approach
  - Adoption and skills development approach
  - Financial plan
- 5.3 The project to implement this suite of tools will be significant and require careful management to ensure the successful implantation of the new technology alongside ensuring the new tools are used by the Council, and they get value from them.
- 5.4 Alongside the implementation of O365 there will be separate projects to review client devices and profile our customers; the outcome of these three activities will define appropriate tools for each role within the Business creating a seamless set of technologies that will become an enabler for greater efficiency and effectiveness.

#### **Conclusion**

- 5.5 The principles on the implementation of O365 attached in Appendix 1 sets out the Council's approach to the implementation of this pivotal suite of tools. These tools will provide the basis for embracing new ways of working, efficiency, mobile working, and collaboration within the Council that in turn will be used to enhance the delivery of citizen centric services.

#### **6. ASSUMPTIONS**

- 6.1 All details within the report are reflective of costings as of May 2019 and within budget 2018/19. Due to the nature of goods and services being procured, costings may increase or decrease depending on market fluctuation. Any fluctuations in costs associated with the implementation of the proposal within the report and outside pre-established budget will be subject to the necessary approval process in line with the Financial Regulations.

#### **7. LINKS TO RELEVANT COUNCIL POLICIES**

- 7.1 The strategy is aligned to the Councils Corporate plan and 6 well-being objectives by providing a gateway to Council services and supporting citizen centric services. The tools will encourage and support communities to interact and use online solutions to deliver services they require.

## **8. WELL-BEING OF FUTURE GENERATIONS**

- 8.1 The principles are aligned to the Wellbeing of future Generations (Wales) Act 2015 as it sets out to improve the social, economic, environmental and cultural wellbeing of the people of Wales. The adoption of the tools will enable a platform to provide an enhanced approach to the delivery of public services.

The Wellbeing and Future Generations Act calls for a massive step change in how organisation such as ourselves plan and deliver public services. Digital transformation will also require a different mind-set. Our proposed strategy is focused on "user need" and improved service delivery therefore providing opportunities for a prosperous and resilient Wales. Providing an equal opportunities to Council services which are safe and well connected.

## **9. EQUALITIES IMPLICATIONS**

- 9.1 An EIA screening has been completed in accordance with the Council's Strategic Equality Plan and supplementary guidance. No potential for unlawful discrimination and/or low level or minor negative impact has been identified, therefore a full EIA has not been carried out.
- 9.2 The completed EIA is attached at Appendix 2.

## **10. FINANCIAL IMPLICATIONS**

- 10.1 The existing Microsoft agreement will end in December 2020 and under Microsoft's licensing model we will need to move to O365 if we are to continue using Microsoft Office products and benefit from the many other collaborative and business tools available under the O365 suite. It is proposed that we move on a phased approach to O365 in readiness for this date ensuring our workforce have the confidence and knowledge to utilise the tools available.
- 10.2 Unfortunately there is not an option to remain as is with the current Microsoft offering & pricing model.
- 10.3 The Microsoft licences are currently funded from the PC replacement fund and the costs in the 2018/19 financial year was £424,823.80. Based on equal migration of the workforce to O365 over the next 18 months, the costs will increase by £13,580.00 in 2019/20 with a further increase of £172,543.00 expected in 2020/21. These projected increases are based on E3 licences. Other licenses and providers are available but these are more expensive than our current proposal.
- 10.4 At the end of this Microsoft agreement (2020) we will enter into a new agreement which will fix the unit costs for the following three years. It is currently estimated that our annual costs will increase in Dec 2020 to £720,142.30 which is approximately 20% increase on 2020 costs. It should be noted that the public sector across Wales has experienced price increase of between 50-60% on their Microsoft licensing when moving to O365 in recent years.
- 10.5 The financial implications of the migration to O365 will be kept under close revision during the implementation period and the additional funding required will be factored into the budget selecting process for 2020/21 and 2021/22 financial years.

## **11. PERSONNEL IMPLICATIONS**

- 11.1 Currently there are no personnel implications to the adoption of these new tools, other than the new digital skills that may be required and will be addressed within the project. The tools will enable new ways of working and these new mechanisms may require alternative processes and procedures to be in place which may have personnel implications. Any changes will be reported as required in line with corporate policies.

## **12. CONSULTATIONS**

- 12.1 This report has been sent to the Consultees listed below and all comments received are reflected in this report.

## **13. STATUTORY POWER**

- 13.1 The Local Government Acts 1998 and 2003.

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Consultees: Cllr, Colin Gordon, Cabinet Member for Corporate Services  
Cabinet Members (through PDM)  
Christina HARRY, Interim Chief Executive  
Corporate Management Team (CMT)  
All Heads of service.  
Customer & Digital Services – Management team  
Councillor James Pritchard – Chair of P&R Scrutiny  
Councillor Gez Kirby – Vice Chair of P&R Scrutiny

### Appendices:

- Appendix 1 Principles on Implementation of O365  
Appendix 2 Equality Impact Assessment Form

## **APPENDIX 1 - PRINCIPLES ON IMPLEMENTATION OF O365**

### **1. REASON FOR SELECTING O365**

- 1.1 Caerphilly is a long term user of the Microsoft Office suite of tools and have been satisfied with their applicability to core office scenarios around document creation, management, delivery, email, and other core functions.
- 1.2 The O365 suite of tools is the latest cloud based iteration of this suite of tools and includes the following advantages:

#### **Deliver familiar Office apps across mobile, web and PC**

- Desktop versions of Office applications on PC or Mac
- Web versions of Microsoft Word, PowerPoint, Excel, and OneNote
- Best-in-class mobile apps optimized for mobile phones and tablets
- Co-authoring in real-time or offline with rich reconciliation tools
- Easily store, share and access your files from all your devices

#### **Introduce new ways to work with experiences like Microsoft Teams**

- Microsoft Teams, a digital team hub that brings conversations, content, and apps together in one place
- Integrated video storage for teams and organisations
- Video broadcasting capabilities (curated or live) to connect your workforce
- Enterprise social networks to promote a culture of openness, feedback and diversity
- Vibrant company portals that inform and engage

#### **Amplify human ingenuity with AI-powered tools**

- Tools to augment human creativity with ink, text, voice, 3D, and virtual reality
- Ask questions using natural language to surface insights from data sets and visualizations
- Cognitive services to set up custom workflows to organize images, trigger notifications, or invoke processes
- Speech recognition that automatically adapts based on presented content with live captions and subtitles
- Discover behaviour patterns with insights that can improve productivity and engagement

#### **Trust that your data is secure and compliant**

- Industry-leading privacy and compliance offerings
- Support for cloud, hybrid, and on-premise deployments
- Protection that spans across users, devices, apps and data –1<sup>st</sup> party or 3<sup>rd</sup> party
- AI-powered security to identify known and unknown threats in your environment
- Customer data is only used to provide agreed upon services and if you leave the data is removed

- 1.3 Other office tools are available and our analysis and comparison was based on the Google G Suite. Our conclusions are:
- Fewer training costs and quicker adoption rates due to the familiarity of the Microsoft software.
  - The O365 suite of tools offer a wider grouping of functionality in a better integrated environment.
  - The success and popularity of the O365 solution provides more integration options across other public sector organisations, partners, and suppliers.

- O365 has security advantages in areas such as identity and access management, information protection, threat protection, security management, and accessibility and inclusiveness.

1.4 Office 365 is available in several options, offering increased functionality and more applications with higher license versions. Microsoft also offer the Microsoft 365 (M365) suite which includes all those applications in the O365 suite plus the Windows operating system and security functionality to protect the Business. The M365 options will reflect the O365 options ensuring like for like through the licensing models.

## **2. IMPLEMENTATION AND ACTIVATION APPROACH**

2.1 The project will be managed by Digital Services and will feed into the transformation programme. Digital Services will deliver O365 based on the customer profile of the Business role. There are a number of interdependencies for the implantation of O365 and some of these are listed in 5.4 of this report however consideration also needs to be given to the impact on internet connectivity as O365 is cloud based. The implementation will be complex and culturally challenging, the implementation will therefore be completed by December 2020.

2.2 The O365 suite of applications is vast and talking to our colleagues across the public sector (including neighbouring Unitary Authorities and Higher Education) it is imperative to define those applications that will be implemented initially, providing the solutions without guidance and support will quickly create an environment which is difficult to work in, manage and benefit from the collaborative tools available. Once such an environment is created it will be difficult to change, trying to return to day zero will not achieve a suitable environment, it is therefore necessary to start with a clear objective and sound guidance.

It is proposed that the familiar applications such as Outlook, Word, PowerPoint and Excel are initiated to continue familiarity and create confidence, alongside these applications the collaborative tool of Teams will also be initiated. Guidelines on the use of Teams will be delivered as part of the implementation, this will give direction and create the experience needed to grow confidence in the new way of working.

2.3 The understanding of the different roles across the Business will be paramount to delivering the appropriate technology and tools to create a climate of can do and facilitate improved effectiveness. The output from the customer profile project will hold valid, current information regarding our customers, these can then be grouped to create personas or roles, which will define the tools required to deliver the appropriate services.

2.4 There will be several key stages to the project:

2.4.1 Project Group. The success of the project will be achieved through a dedicated internal team with external assistance if required, regular project updates and management through the Digital Leadership Team. The reporting structure, alongside resource allocations needs to be defined in this stage.

2.4.2 Pilot Stage. Creation of guidelines for the pilot groups and development of these guidelines following experiences of the pilot groups. The pilot groups will consist of a technical and several functionality pilots. The technical pilot will engage Digital Services who will configure and test known customisations and check for technical compatibility and reliability. The functionality pilots will engage customers who will operate the applications and provide feedback to the project team.

2.4.3 Business Roles. This stage will analyse the results of the customer profiling and device review and agree a set of technologies that will become an enabler for the role.

- 2.4.4 Delivery Schedule. Development of an implementation schedule across the Business for O365. It will be necessary to develop our training provision, realising that there is not one fit for all, offering different channels for the provision of training material.
- 2.4.5 Communication Strategy. The definition of a clear communication strategy and identification of a communication champion. The communication channels and style will need to be agreed, incorporating project updates, successes and frequently asked questions. This stage will need to define the project reporting line. It will be important to state which applications will be in first stage of implementation and ideas of when other applications will be introduced to the Business.
- 2.4.6 Implementation. Implementation of O365 across the Authority as defined in the schedule, at pre-defined points update guidelines and lessons learnt in readiness for next group, feeding into communication strategy. As part of the implementation activities, "Digital Champions" will be identified who will work closely with the project team to support colleagues and develop the O365 suite over time.
- 2.4.7 Phase 1 review. Once O365 has been rolled out across the Business it will be critical to have a full review of the project, identifying what went well and not so well and defining lessons learnt for subsequent stages.
- 2.5 We are working closely with Microsoft and benefiting from their experience in such migrations; it is our intention to take full advantage of Microsoft's capabilities in similar such projects and will be looking to Microsoft's technical and "Fast track" teams for assistance. We have worked with a Microsoft partner to assist in the initial configurations and to transfer their appropriate skills and knowledge to our internal teams.
- 2.6 The move to O365 will allow us to move our email and documents into the Microsoft cloud, allowing those servers in the Data Centre currently providing these services to be redeployed within the on-premise infrastructure. As a pre-requisite to this move it will be essential that staff perform appropriate housekeeping on the information held in line with data retention policies and General Data Protection Regulation. O365 will provide tools to easily search for information across documents and email that have been moved into the Microsoft cloud.
- 2.7 To create an environment that integrates fully with the Corporate network, Digital Services will enable access to O365 through the use of your standard network profile and password; to protect our Officers and the Authority this is only allowed from the secure Caerphilly CBC network. Access will be available from outside of the Caerphilly CBC network but to protect the Authority in these circumstances another form of authentication will be required in addition to your usual network identification and password, this multi factor authentication is an optional service in O365 but is included in the M365.
- 2.8 The move to a more agile workforce to increase effectiveness, improve efficiencies and support the asset management strategy will increase the number of mobile devices in use throughout the Authority. To protect the Authority against threats from cyber criminals and breaches in GDPR it will be necessary to manage these devices accordingly. The M365 suite will allow such management and the option to rationalise solutions will be achievable through this suite of applications. Careful consideration is needed to facilitate appropriate use of the device whilst offering necessary protection to the Authority.

### 3. ADOPTION AND SKILLS DEVELOPMENT APPROACH

- 3.1 The implementation of the O365 suite will require a widespread cultural change throughout the Business to achieve the benefits of the solution. As the interoperability of O365, agile working and customer profiles merge into a programme of works there will be a requirement to review some of the policies currently in use, and possibly to develop new procedures and policies.

Some policies that may need to be reviewed or created are:

- Those supporting agile and home working
  - Definition of working times
  - Supported devices for roles
  - Acceptable use of Authority supplied equipment
  - Information management
  - Information security
  - Freedom of Information
  - General Data Protection Regulation
  - Health and safety
  - Those supporting the use of social media
- 3.2 The customer profile will allow identification of the skills gap across the Authority, which will enable a programme of training to be developed to bridge the skills gap and facilitate greater use of the functionality in each application to drive the effectiveness and creativity across the Business. These profiles will be updated bi-annually and help to develop a workforce that will embrace change and be confident to use the technology to deliver efficient services.
- 3.3 It will be crucial to the implementation that Customer and Digital Services are able to support customers as they move to, and embrace, O365. The technology pilot will facilitate knowledge and combined with various channels of training and greater usage will create the experience in Digital Services to support the Business. The IT Service desk will be critical to this support and will be included from the start of the project as a key member of the support service.
- 3.4 Customer and Digital Services will be the first full service area migrated to O365, and will lead by example, it will be important however to have the project driven from the top within the Authority and a senior manager as Sponsor will promote and support the adoption of the technology. This approach combined with the elevation of Digital Champions across the Business will create empowerment and ownership by the Business, ultimately delivering better usage of the applications. Our Digital Champions will have regular interaction with the project team and feed into the decision making process for the programme of works.
- 3.5 Developing various training channels will allow Customers to choose the medium that compliments their training preferences, not everyone enjoys classroom based training, we live in a multimedia world and our training delivery will develop to reflect this. Where possible we will utilise the training materials from Microsoft that is available through O365.
- 3.6 Communication will be critical to delivering a successful project, and Digital Services will create a communication strategy to announce O365, how it can benefit the Business and where support can be obtained to benefit from the new technologies. The strategy will communicate to the Business at all levels, clarifying the benefits of the technology and where possible providing examples to stimulate creativity. The communication strategy will consider different options to deliver the messages and information regarding the project.
- 3.7 Cultural change will be embraced by some who will push the boundaries of the new technology and in doing so improve their service delivery, these achievements should be acknowledged and where appropriate used as examples of good practice. Understanding



how we embrace technology and use it to benefit our services will be core to the acceptance of the changes across the Authority.

There may however be some pockets of reluctance to the new technologies and it will be important that these groups are shown the benefits that can be achieved, and this will be best shown by real life examples. We will need to work with these groups and engage with them to alleviate any concerns they may have and where necessary help to develop the technology for their group. Digital Services will work with the Sponsor and Digital Champion in such circumstances

#### **4. FINANCIAL PLAN**

- 4.1 The existing Microsoft agreement will end in December 2020 and under Microsoft's licensing model we will need to move to O365 if we are to continue using Microsoft Office products and benefit from the many other collaborative and business tools available under the O365 suite. It is proposed that we move to O365 in readiness for this date ensuring our workforce have the confidence and knowledge to utilise the tools available.
- 4.2 The existing Microsoft agreement will end in December 2020 and under Microsoft's licensing model we will need to move to O365 if we are to continue using Microsoft Office products and benefit from the many other collaborative and business tools available under the O365 suite. It is proposed that we move on a phased approach to O365 in readiness for this date ensuring our workforce have the confidence and knowledge to utilise the tools available.
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# EQUALITY IMPACT ASSESSMENT FORM

October 2018

## THE COUNCIL'S EQUALITIES STATEMENT

This Council recognises that people have different needs, requirements and goals and we will work actively against all forms of discrimination by promoting good relations and mutual respect within and between our communities, residents, elected members, job applicants and workforce.

We will also work to create equal access for everyone to our services, irrespective of ethnic origin, sex, age, marital status, sexual orientation, disability, gender reassignment, religious beliefs or non-belief, use of Welsh language, BSL or other languages, nationality, responsibility for any dependents or any other reason which cannot be shown to be justified.

The Council is required to have due regard to the need to:

- eliminate unlawful discrimination, harassment and victimisation and other conduct that is prohibited by the Equality Act 2010
- advance equality of opportunity between people who share a relevant protected characteristic and those who do not
- foster good relations between people who share a protected characteristic and those who do not.

The Act explains that having due regard for advancing equality involves:

- removing or minimising disadvantages experienced by people due to their protected characteristics
- taking steps to meet the needs of people from protected groups where these are different from the needs of other people
- encouraging people with protected characteristics to participate in public life or in other activities where their participation is disproportionately low.

The protected characteristics are:

- |                                  |                                  |
|----------------------------------|----------------------------------|
| • Age                            | • Race                           |
| • Disability                     | • Religion, Belief or Non-Belief |
| • Gender Re-assignment           | • Sex                            |
| • Marriage and Civil Partnership | • Sexual Orientation             |
| • Pregnancy and Maternity        | • Welsh Language*                |

\* The Welsh language is not identified as a protected characteristic under the Equality Act 2010, however in Wales we also have to treat Welsh and English on an equal basis as well as promoting and facilitating the use of the Welsh language.

Further advice on completing impact assessments can be found on the equalities pages of Corporate Policy Unit Portal.

## THE EQUALITY IMPACT ASSESSMENT

<b>NAME OF NEW OR REVISED PROPOSAL*</b>	Microsoft Office 365
<b>DIRECTORATE</b>	Education & Corporate Services
<b>SERVICE AREA</b>	Customer & Digital Services
<b>CONTACT OFFICER</b>	Liz Lucas Head of Customer & Digital Services Gwyn Williams Digital Manager
<b>DATE FOR NEXT REVIEW OR REVISION</b>	Yearly in line with Service Review

**\*Throughout this Equalities Impact Assessment Form, 'proposal' is used to refer to what is being assessed, and therefore includes policies, strategies, functions, procedures, practices, initiatives, projects and savings proposals.**

The aim of an Equality Impact Assessment (EIA) is to ensure that Equalities and Welsh Language issues have been proactively considered throughout the decision making processes governing work undertaken by every service area in the Council as well as work done at a corporate level.

The Council's work across Equalities, Welsh Language and Human Rights is covered in more detail through the [Equalities and Welsh Language Objectives and Action Plan 2016-2020](#).

When carrying out an EIA you should consider both the positive and negative consequences of your proposals. If a project is designed for a specific group e.g. disabled people, you also need to think about what potential effects it could have on other areas e.g. young people with a disability, BME people with a disability.

There are a number of supporting guidance documents available on the [Corporate Policy and Business Support Portal](#) and the Council's Equalities and Welsh Language team can provide advice as the EIA is being developed. Please note that the team does not write EIAs on behalf of service areas, the support offered is in the form of advice, suggestions and in effect, quality control.

Contact [equalities@caerphilly.gov.uk](mailto:equalities@caerphilly.gov.uk) for assistance.

## PURPOSE OF THE PROPOSAL

<b>1</b>	<b>What is the proposal intended to achieve?</b> <i>(Please give a brief description and outline the purpose of the new or updated proposal by way of introduction.)</i>  The migration of Microsoft Office products from on premise solutions to cloud based solutions, this will include, over time, the introduction of new technologies. The move to cloud solutions will support the Authority's agile strategy and asset rationalisation programme.
<b>2</b>	<b>Who are the service users affected by the proposal?</b> <i>(Who will be affected by the delivery of this proposal? e.g. staff members, the public generally, or specific sections of the public i.e. youth groups, carers, road users, people using country parks, people on benefits etc. Are there any data gaps?)</i>  Those staff who currently have access to Microsoft Office products.

## IMPACT ON THE PUBLIC AND STAFF

<b>3</b>	<b>Does the proposal ensure that everyone has an equal access to all the services available or proposed, or benefits equally from the proposed changes, or does not lose out in greater or more severe ways due to the proposals?</b> <i>(What has been done to examine whether or not these groups have equal access to the service, or whether they need to receive the service in a different way from other people?)</i>  Access to the products will continue in the same way.
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<b>4</b>	<b>Is your proposal going to affect any people or groups of people with protected characteristics?</b> <i>(Has the service delivery been examined to assess if there is any indirect effect on any groups? Could the consequences of the policy or savings proposal differ dependent upon people's protected characteristics?)</i>	
	<b>Protected Characteristic</b>	<b>Positive, Negative, Neutral</b>
		<b>What will the impact be? If the impact is negative how can it be mitigated?</b>
	Age	Neutral
	Disability	Neutral
	Gender Reassignment	Neutral
	Marriage & Civil Partnership	Neutral
	Pregnancy and Maternity	Neutral
	Race	Neutral
	Religion & Belief	Neutral
	Sex	Neutral
	Sexual Orientation	Neutral
		None

<b>5</b>	<b>In line with the requirements of the Welsh Language Standards. (No.1) Regulations 2015, please note below what effects, if any (whether positive or adverse), the proposal would have on opportunities for persons to use the Welsh language, and treating the Welsh language no less favourably than the English language.</b> <i>(The specific Policy Making Standards requirements are Standard numbers 88, 89, 90, 91, 92 and 93. The full detail of each Standard is available on the Corporate Policy Unit Portal. Although it is important that what is outlined in the proposal is available in Welsh and English, please consider wider impacts on Welsh speakers.)</i>	
	None	

## INFORMATION COLLECTION

<b>6</b>	<p><b>Please outline any evidence and / or research you have collected which supports the proposal? This can include an analysis of service users.</b> <i>(Is this service effectively engaging with all its potential users or is there higher or lower participation of uptake by one or more protected characteristic groups? If so, what has been done to address any difference in take up of the service? Does any savings proposal include an analysis of those affected?)</i></p> <p>The service will be available to all staff who currently use Microsoft Office products. Actions Required: staff profiling will be performed to ensure that each staff member has access to the appropriate products.</p>
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## CONSULTATION

<b>7</b>	<p><b>Please outline the consultation / engagement process and outline any key findings.</b> <i>(Include method of consultation, objectives and target audience. What steps have been taken to ensure that people from various groups have been consulted during the development of this proposal? Have you referred to the Equalities Consultation and Monitoring Guidance?)</i></p> <p>No consultation has taken place at the moment as the products will replace those currently in operation and accessibility will not be affected. Actions required: review consultation requirements following pilot phases.</p>
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## MONITORING AND REVIEW

<b>8</b>	<p><b>How will the proposal be monitored?</b> <i>(What monitoring process has been set up to assess the extent that the service is being used by all sections of the community, or that the savings proposals are achieving the intended outcomes with no adverse impact? Are comments or complaints systems set up to record issues by Equalities category to be able analyse responses from particular groups?)</i></p> <p>Through pilot groups feedback, and engagement with staff before, during and after migration to new service. Actions Required: Formal communications and feedback during the project.</p>
<b>9</b>	<p><b>How will the monitoring be evaluated?</b> <i>(What methods will be used to ensure that the needs of all sections of the community are being met?)</i></p> <p>Continuation of accessibility to Microsoft Office products by staff.</p>

<b>10</b>	<b>Have any support / guidance / training requirements been identified?</b> <i>(Has the EIA or consultation process shown a need for awareness raising amongst staff, or identified the need for Equalities or Welsh Language training of some sort?)</i>  Training has been developed to assist staff in the migration process and support will be available following migration.
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<b>11</b>	<b>If any adverse impact has been identified, please outline any mitigation action.</b>  None
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<b>12</b>	<b>What wider use will you make of this Equality Impact Assessment?</b> <i>(What use will you make of this document i.e. as a consultation response, appendix to approval reports, publicity etc. in addition to the mandatory action shown below?)</i>  This EIA will be appended to all reports for decision
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<b>13</b>	<p><b>An equality impact assessment may have four possible outcomes, through more than one may apply to a single proposal. Please indicate the relevant outcome(s) of the impact assessment below.</b></p> <p style="text-align: right;"><b>Please tick as appropriate:</b></p> <p><b>No major change</b> – the impact assessment demonstrated that the proposal was robust; there was no potential for discrimination or adverse impact. All opportunities to promote equality have been taken. <input checked="" type="checkbox"/></p> <p><b>Adjust the proposal</b> – the impact assessment identified potential problems or missed opportunities. The proposal was adjusted to remove barriers or better promote equality. <input type="checkbox"/></p> <p><b>Continue the proposal</b> – the impact assessment identified the potential problems or missed opportunities to promote equality. The justification(s) for continuing with it have been clearly set out. (The justification must be included in the impact assessment and must be in line with the duty to have due regard. Compelling reasons will be needed for the most important relevant proposals.) <input type="checkbox"/></p> <p><b>Stop and remove the proposal</b> – the impact assessment identified actual or potential unlawful discrimination. The proposal was stopped and removed, or changed. <input type="checkbox"/></p>
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<b>Completed by:</b>	Gwyn Williams
<b>Date:</b>	20/05/2019
<b>Position:</b>	Digital Manager
<b>Name of Head of Service:</b>	Elizabeth Lucas