

People Impact Assessment

Our People Impact Assessment identifies how HIE's strategies, policies, projects, programmes etc (the proposal being assessed) can help address inequality. Identifying positive impact strengthens the case for approval and identifying potentially negative impact allows HIE to make changes early which will eliminate or mitigate negative effects in delivery. Most importantly this strengthens our ability to influence and deliver inclusive growth, particularly as it affects people.

It guides you through three stages:

- **Screening:** screens out proposals which do not need assessment
- **Assessment:** identifies how your proposal is likely to address inequality
- **Action Plan:** identifies action you will take as a result of the assessment

Proposal being assessed:

Title:	Microsoft Copilot 365 roll out		
Type of activity:	☐ Policy ☒ HIE Own Hand	☐ Strategy ☐ Third Party Client	☐ Partnership activity
Is your proposal:	☐ New	☒ Existing and being revised	☐ Subject to Procurement
MyHIE Reference (if applicable):			

Screening Section

For detailed guidance hover next to each Guidance heading and click on the blue arrow that will pops up on the left to expand 

Screening Guidance

Screening is a short exercise to determine if a policy is relevant to equality and whether a full People Impact Assessment (PIA) should be carried out. A screening exercise is not an impact assessment, so the results of screening do not need to be published.

Question A1

Will the proposal affect individual service users* or HIE employees, and could these people have different needs and priorities?

☒ Yes ☐ No

*Individual service users are people who will participate as individuals on HIE programmes and/or who use HIE spaces (ie, our land and buildings).

Question A1 Guidance

Question A2

Does the proposal contribute to the following in relation to any of the **protected characteristics** : age, disability, gender reassignment, marriage and civil partnership, maternity or pregnancy, race, religion or belief, sex, sexual orientation. (please tick all that apply below)

- ☐ eliminating **unlawful discrimination, victimisation or harassment**
- ☒ advancing equality of opportunity:
 - by removing or minimising disadvantage for a group(s) of people e.g., increasing participation in economic activity by women
 - by meeting the needs of particular groups which differ from the needs of others e.g., by taking account of disabled people's impairments.
 - by encouraging participation in public life for a group(s) of people
- ☐ fostering good relations:
 - by tackling prejudice
 - by promoting understanding between groups of people

Question A2 Guidance

If you have ticked Yes to Question 1 and/or any of the options in Question 2, proceed to the Assessment section below

If you have ticked No to question 1 and have **not ticked** any of the options in Question 2, your proposal is not relevant to equality. You should now complete the Screening Sign Off below and place this document on file as outlined below.

Screening Sign Off

You **must** confirm in relevant approval papers that the proposal has been screened for impact in relation to equality and that you consider full assessment is not required

Screening assessment completed by (project officer)	
Date of decision:	
Screening reviewed by (Senior Responsible Officer - SRO)	
Date of decision:	

You must retain this screening document with your strategy, policy, project or programme papers. Screening documentation is subject to the provisions of the General Data Protection Regulation effective from May 2018 and Freedom of Information (Scotland) Act 2002

If you have completed the Screening Sign Off and it has been signed off by delegated authority, the assessment of the proposal ends at this stage.

Assessment Section

Requirements to publish impact assessments

Impact assessments must be published, demonstrating that HIE has paid due regard to equality in the development and delivery of our functions. Assessments are subject to the provisions of the Data Protection Act 2018 and Freedom of Information (Scotland) Act 2002

Question B1 - Purpose of the proposal

What is the purpose of the proposal, who are the main beneficiaries (e.g. employees/service users, equality groups, other stakeholders) and what are the intended outcomes?

Roll out of E7 licences to all HIE colleagues which is an inbuilt feature enabled as part of Microsoft E7 licencing. Our pilot project involved 15 users which was then extended to 100 users with remaining colleagues being provided with Copilot Chat. A change to the licencing model within EIS enables organisation wide roll out of full M365 Copilot to all colleagues. This removes the inequity of different licence models and access to AI tools within the organisation.

The purpose of full roll out is to support day-to-day work, improve productivity, reduce manual effort, make better use of information already held in Microsoft 365, and provide colleagues with assistance for routine drafting, summarising, meeting support and information discovery. Copilot is a productivity and support tool; it is not being introduced to replace employees or as an automated means of assessing employee performance.

Question B1 Guidance

Question B2 - Evidence of potential impact on people

What does evidence tell you about the likely impact of the proposal on different groups of people? Consider the impact of the proposal on people with **protected characteristics**.

What does the evidence tell you	Source of evidence
<p>Copilot experience and adoption is positive but uneven (evidence not analysed by protected characteristic)</p> <p>HIE Internal survey data found that:</p> <ul style="list-style-type: none"> • 85% of respondents found Copilot helpful in day-to-day work. • 67% reported a positive or very positive experience. • Around 1 in 5 reported mixed experiences. <p>The main barriers were uncertainty about where to start, lack of confidence, training needs, concerns about accuracy and security, and time to learn the tool rather than any 'groups' of people</p>	<p>Copilot Slido results and drop in April 2026 - Details https://hie.nexus.objective.co.uk/documents/A4811073/details</p>
<p>Copilot can support disability and neurodiversity</p> <p>A large EY and Microsoft study involving more than 300 employees who identify as disabled and/or neurodivergent across 17 organisations found:</p> <ul style="list-style-type: none"> • 91% viewed Copilot as a valuable assistive technology. • 85% believed it could support a more inclusive workplace. • 76% reported it helped them thrive professionally. <p>The study identified benefits including:</p> <ul style="list-style-type: none"> • Reduced cognitive load. • Support with communication and writing. • Improved memory recall. • Meeting summarisation. • Help structuring thoughts and information. • Reduced anxiety around drafting communications. 	<p>[blogs.microsoft.com], [news.microsoft.com], [ey.com]</p>
<p>Copilot can act as a good tool to enable colleagues who have been on an extended period of leave to catch up on activity</p> <p>Microsoft 365 Copilot has the potential to provide particular benefits for colleagues returning from extended periods of absence, including maternity leave, adoption leave, long-term sickness absence, disability-related absence, caring responsibilities or career breaks. Evidence from Microsoft indicates that Copilot can summarise missed meetings, emails, chats, documents and project activity, enabling staff to regain context more quickly and identify priorities, actions and key decisions. HIE's own experience of Copilot adoption</p>	<p>[support.mi...rosoft.com], [Copilot 365 roll out PowerPoint], [Pilot findings PowerPoint]</p>

also demonstrates significant benefits in summarising information, preparing briefings and extracting key points from large volumes of content. The availability of these capabilities may help reduce the disadvantage that can arise when colleagues return to work after a prolonged absence and therefore supports HIE's duty to advance equality of opportunity.

Summary of what the evidence tells you, who may be affected and how:

The greatest equality risk is not the technology itself, but unequal adoption, confidence and access to support. HIE's survey concluded that confidence and adoption are uneven and that structured, role-relevant support is required. Leadership actions identified include practical examples, peer learning, awareness raising and guidance.

This would suggest a potential impact on:

- Colleagues who may have lower confidence with emerging technologies.
- Colleagues returning from absence or maternity leave who may miss adoption activity.
- Colleagues in roles with fewer opportunities for digital experimentation.
- Colleagues with specific accessibility requirements if support materials are not accessible.

Question B2 Guidance

Question B3 - Evidence gaps

Are there are evidence gaps? If so, how will you fill these? For example, are there any experts or stakeholders you should involve/consult now? Please add N/A in the box below if there are no further evidence gaps.

There is no organisational evidence showing usage by protected characteristic and nor would HIE plan to do so. HIE does not routinely monitor individual Copilot prompts or outputs for employee performance or productivity management purposes. There will instead be opportunities for individuals to provide voluntary feedback on accessibility, confidence and barriers.

Copilot has been discussed at the Staff forum and various internal groups including Leadership team, Senior Managers and teams meetings. The AI policy is currently in circulation to the staff forum and PCS union. The level of organisational engagement has been high and support is available

through Viva Engage, intranet pages, monthly drop in's and directing to other Microsoft resources. This level of engagement will continue as well as regular temperature checks/surveys.

Question B3 Guidance

Question B4 - Assessing impact

Include below any positive or adverse impact which may occur as a result of the planned delivery of the proposal - consider employees, clients, service users, and any other relevant groups.

Does your analysis of the evidence indicate any possible adverse impact on a [particular equality group](#)? In some cases adverse impact may amount to [unlawful discrimination](#). For own hand projects where you have a concern that an adverse impact may amount to unlawful discrimination you should refer to HIE legal service for advice. If the project is third party, you should advise the client to seek their own legal advice. Guide for SMEs on unlawful discrimination is available [here](#)

**Hover over each category below for further information	Impact			Please explain the potential impacts
	Positive impact	Negative impact	No/neutral impact	
<u>Age</u>	☒	☐	☐	<p>Can assist colleagues who may be less familiar with digital tools by simplifying tasks, summarising information and supporting learning. Equally, it may help retain knowledge and support colleagues at different career stages.</p> <p>However, colleagues with lower digital confidence may feel disadvantaged if support is not provided highlighting the need for support channels to ensure that this is not realised. There is no evidence this is necessarily associated with age.</p>
<u>Disability</u>	☒	☐	☐	<p>May improve accessibility through summarisation, drafting support, transcription, formatting assistance, readability improvements and reducing cognitive load. Could particularly</p>

				benefit staff with dyslexia, neurodivergent conditions, visual impairments or fatigue-related conditions.
<u>Gender Reassignment</u>	☐	☐	☒	There is a low risk that AI may produce stereotypes or culturally inappropriate content. It is important that all outputs are reviewed before being used or shared.
<u>Marriage and Civil Partnership</u>	☐	☐	☒	
<u>Pregnancy and Maternity</u>	☒	☐	☐	May support colleagues managing changing workloads or returning from leave through information summarisation and knowledge transfer.
<u>Race</u>	☒	☐	☐	Translation, language support and drafting assistance may help some colleagues where English is not their first language. There is a low risk that AI may produce stereotypes or culturally inappropriate content. It is important that all outputs are reviewed before being used or shared.
<u>Religion or Belief</u>	☐	☐	☒	There is a low risk that AI may produce stereotypes or culturally inappropriate content. It is important that all outputs are reviewed before being used or shared.
<u>Sex</u>	☐	☐	☒	There is a low risk that AI may produce stereotypes or culturally inappropriate content. It is important that all outputs are reviewed before being used or shared.
<u>Sexual orientation</u>	☐	☐	☒	There is a low risk that AI may produce stereotypes or culturally inappropriate content. It is important that all outputs are reviewed before being used or shared.

Question B4 Guidance

Question B5 - Assessing impact - General Equality Duty

Please explain in more detail how the proposal will meet the general equality duties

	Please explain
Eliminating discrimination, harassment and victimisation <i>We can do this by eliminating less favourable treatment or indirect discrimination</i>	<p>There is no evidence that the rollout of Microsoft 365 Copilot will directly discriminate against any protected characteristic group. Access to Copilot would be available to all colleagues on an equal basis which puts HIE in a more equitable position than the tiered roll out previously in place.</p> <p>HIE's AI policies and expectations of use requires that outputs are reviewed by staff and that professional judgement remains with the user, reducing the risk of automated decision-making affecting individuals.</p> <p>However, generative AI systems may occasionally generate content containing stereotypes, assumptions or inappropriate language. Wider responsible AI guidance therefore recommends human oversight, validation of outputs and monitoring for bias.</p>
Advancing equality of opportunity <i>We can do this by removing or minimising disadvantage, meeting needs which are particular to some groups of people and encouraging participation of under-represented groups, e.g. taking account of disabled people's impairments</i>	<p>HIE's own Copilot survey found that staff are already experiencing benefits in relation to summarising information, improving writing, research, productivity and reducing administrative effort. However, confidence and adoption remain uneven, and support needs are strongly linked to learning and awareness rather than technical barriers.</p> <p>External research provides particularly strong evidence of benefits for disabled and neurodivergent colleagues.</p> <p>The rollout has the potential to:</p> <ul style="list-style-type: none">• Remove or reduce barriers experienced by some disabled and neurodivergent colleagues.• Improve access to information.• Support a wider range of communication and learning styles.• Reduce administrative burden and repetitive tasks.

	<ul style="list-style-type: none"> • Support colleagues whose first language is not English through drafting and language support. • Enable more inclusive participation in meetings and collaborative working. • Support flexible and hybrid working arrangements. <p>To maximise these benefits, HIE's own evidence suggests that structured, role-relevant support, peer learning and accessible guidance will be important.</p>
Fostering good relations <i>We can do this by tackling prejudice and promoting understanding amongst our staff and client groups</i>	<p>There is some evidence that Copilot can help foster understanding and inclusion by improving communication, reducing barriers to participation and enabling collaboration between people with different communication styles, accessibility needs and language backgrounds.</p> <p>HIE's approach to adoption has also emphasised learning, knowledge sharing, peer support, psychological safety and encouraging questions and discussion about opportunities and risks.</p> <p>The survey findings indicate that adoption barriers are largely related to confidence, trust and understanding, suggesting that open discussion and shared learning will help reduce misconceptions and build confidence across the workforce.</p> <p>While fostering good relations is likely to be an indirect benefit, the rollout has the potential to support greater understanding of different working styles, accessibility needs and inclusive workplace practices when accompanied by appropriate communication, training and engagement.</p>

Question B5 Guidance

Question B6

Could the proposal be modified to reduce the potential for [unlawful discrimination](#), advance/promote equality, reduce any identified negative impacts and foster good relations? If necessary, consider other ways in which the aims and objectives of the proposal could be met. What can be done now/later?

Most important to the role out is to ensure accessible and inclusive adoption support is available.

Question B6 Guidance

Question B7 - Procurement

Does your proposed activity involve procurement activity in:

Goods/Services £10k and above: ☐ **Yes** ☒ **No**

Works £50k and above: ☐ **Yes** ☒ **No**

If you have answered Yes to one/both of the above, please advise HIE Procurement Team procurement@hient.co.uk for further support on how the potential impacts can be included (as appropriate) into:

1. Your Scope of Requirements for the procurement(s)
2. Evaluation criteria
3. Key Performance Indicators
4. Contract Management process

Question 7 Guidance

Question 8 - Summary of actions and monitoring review arrangements to address inequality

The following summarises actions to be taken as a result of the People Impact Assessment and **should be outlined in the social and people impact assessment section of the appraisal paper.**

A key part of every impact assessment is the actions that HIE will take, and the recommendations made as part of due diligence to enhance or mitigate the impacts identified. Actions and recommendations should be based on evidence available at the time and aim to mitigate negative impacts or enhance positive impacts on any or all of the protected characteristics.

What are the main impacts on equality (if there are no equality impacts to enhance any of the protected characteristics, please enter N/A)?

The proposal is expected to have an overall positive impact, but no adverse-impact finding can be treated as definitive because HIE does not currently hold evidence analysed by protected characteristic. Plausible risks include unequal confidence and take-up, unmet accessibility needs, biased or inaccurate outputs, work-intensification and exclusion of colleagues absent during rollout. These risks are considered manageable provided the actions in this assessment are completed, monitored and reviewed.

What are the main recommendations to enhance or mitigate the impacts identified? (If there are no mitigations or enhancements to be made, please enter N/A)

The action plan below summarises the approach to roll out to help address impacts identified within this assessment.

ACTION PLAN

The actions should be specific, measurable, achievable, relevant and time-bound (SMART).

Potential impact to be addressed	Action to be taken	Person responsible for delivery	Timescale for delivery
Uneven confidence and adoption	Provide accessible, role-relevant training, practical examples, drop-ins and peer support; retain alternative learning formats and routes to help.	[REDACTED]	From rollout and ongoing
Accessibility needs not fully met	Ensure all guidance and training materials are accessible; invite colleagues to identify adjustments through existing confidential channels and engage relevant staff networks or representatives.	[REDACTED]	Before rollout; review quarterly
Staff absent during rollout may miss support	Include Copilot guidance and training in return-to-work arrangements for colleagues returning from maternity, long-term sickness or other extended leave.	[REDACTED]	From rollout and ongoing
Bias, stereotypes or inaccurate outputs	Train users to check outputs, apply professional judgement and report problematic content; reinforce that Copilot must	[REDACTED]	Before rollout; refresh annually

	not be used for profiling, performance assessment or automated decisions.		
Unequal outcomes are not identified	Run proportionate staff pulse checks on confidence, usefulness, accessibility and barriers; analyse feedback by role or work context where appropriate, without monitoring individual prompts or performance.		At around 3 and 6 months, then annually
Governance or guidance becomes outdated	Review the assessment, AI policy, training and support when Microsoft functionality changes, new evidence emerges, or staff feedback identifies an issue.		From rollout and ongoing

Monitoring and review of the action plan above should be part of standard project aftercare and monitoring arrangements.

Question 8 Guidance

The full signed assessment is held with proposal papers and published on the [HIE website](#).

Date of signing off completed assessment:	August 2026