

2SLGBTQ+ Health Equity Plan *Equity*
Leadership
Anti-racism
Meaningful
Inclusion
Bias and Privilege
Cultural Humility
Advocacy
Policy
Gender Equity
Racial Equity
Health Equity
BOARD CAPACITY
Collaborate
Partnership

Health Equity Charter

Self-Assessment Tool



About the Health Equity Charter Self-Assessment Tool¹

As part of the Health Equity Charter resolution that was adopted in November 2020, Alliance members committed to reviewing their progress putting Health Equity Charter into action on an annual basis. To support members through this process, the Alliance has developed this self-assessment tool.

Why use the Health Equity Charter Self-Assessment Tool?

Advancing health equity is an ongoing process and every member is at a different point in this journey. The goal of the self-assessment tool is to help members identify strengths and challenges in their health equity work, as well as develop key actions to help advance health equity in their organizations, in the communities they serve and on a broader system level. It can help inform other areas of work, for instance strategic planning, developing an operational plan or going through an accreditation process.

Who should use the Health Equity Charter Self-Assessment Tool?

Self-assessment should be completed by the Board with input from Executive Leadership and staff where required. It can also be used by leadership and management in your organization to help inform the operational plan or other areas of work.

Alliance role

After completing the self-assessment, boards are encouraged to submit a short report to the Alliance. The report will be used to profile examples of the work from different organizations to advance health equity and share them across membership and with the broader health equity community. Your reports will also help the Alliance to identify and develop additional tools and resources.

How to use the tool

A **series of statements** have been written to encourage you to reflect on how you are currently putting the Health Equity Charter into action, and whether there are gaps in the health equity work. Depending on your capacity, you can decide to go through all the statements or focus on a select few.

There are **guidance points** which you may like to consider when reflecting on your organization's performance against each statement.

The **evidence section** gives you space to record the assessment of your progress, highlighting strengths and challenges and noting examples.

A **rating scale** at the end of each statement enables you to track your progress. We recognize that health equity work is a journey. This section allows you to identify where your organization is on the scale for each statement, and is meant to help you compare your progress from year to year.

The **key areas for action** section enables you to record the most relevant and important areas for improvement that you have identified as a result of completing the self-assessment tool.

The **Health Equity Charter Self-Assessment Overview** sheet enables you to look at your overall position, and identify key areas of success or areas that may require further work.

The **Health Equity Charter Progress Report form** is to be filled out after you complete self-assessment and submitted to the Alliance to enable joint learning and resource sharing.

¹ The Health Equity Charter Self-Assessment Tool was adapted from the Health Equity Audit: A Self-Assessment Tool developed by the Department of Health and National Health Services in the UK.

<p>Make Health Equity a strategic priority</p>	<p>Develop a Health Equity profile: Identify local health inequities, gaps and needs</p>	<p>Identify and implement priority actions to help reduce health inequities</p>	<p>Review progress & assess impact</p>
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Self-assessment statement 1

We understand the importance of addressing health inequities and demonstrate organization-wide commitment to advancing health equity.

► GUIDANCE

CONSIDER, FOR EXAMPLE:

- Do your vision, mission and values reflect commitment to advancing health equity in your organization, the communities you serve and on a broader system level?
- Do you have position statements, policies and practices that reflect commitment to health equity?
- Have you endorsed the Health Equity Charter? Have you shared it with your partners and communities (on your website, in your building, in meetings, on joint committees, etc.)
- Do you have a health equity framework and/or plan?
- Do your strategic directions address the barriers to health and wellbeing for your priority populations?
- Do you understand the role of your organization in addressing health inequities and advancing health equity, along with local partners?

► EVIDENCE

Use this space to record the highlights of your discussions and present evidence to support your decisions. You may find it helpful to think about the particular strengths and weaknesses of your organization. (Use additional space, if required, to capture detailed conversations.)

▶ OVERALL RATING

There is a high level of understanding of the organization’s role in addressing health inequities. Commitment to advancing health equity is clearly articulated and documented.

1	2	3	4	5
Not true at all: this statement doesn't describe our organization at all	Somewhat true: the work is at its initial stages	Fairly true: the work is progressing well	Mostly true: we've made significant progress but more work is required	Absolutely true: this statement describes our organization very well

▶ KEY AREAS OF ACTION

Key area of action	Lead	By when	Review date

<p>Make Health Equity a strategic priority</p>	<p>Develop a Health Equity profile: Identify local health inequities, gaps and needs</p>	<p>Identify and implement priority actions to help reduce health inequities</p>	<p>Review progress & assess impact</p>
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Self-assessment statement 2

The Board and staff are well equipped to advance health equity in the organization and broader community.

► GUIDANCE

CONSIDER, FOR EXAMPLE:

- Does your Board reflect the communities your organization serves?
- Do you have human resource policies and practices in place designed to ensure that the diversity of the communities you serve is reflected at all levels of your organization, including volunteers, staff and management?
- Has your Board signed up for the [Governing for Health Equity training](#)?
- Are Board and staff members engaged in regular training and reflection activities to examine internal biases and build understanding of structural inequities, systemic racism, colonialism and white supremacy and how they impact your priority populations?
- Is anti-oppression and anti-racism training included in the onboarding process for Board, staff and volunteers?
- Have your Board and staff taken trainings to better understand the needs of and barriers faced by the Alliance’s priority populations, including Indigenous Peoples, Francophones, Black and racialized communities, and 2SLGBTQ+ communities? Some examples include, but are not limited to: [Indigenous Cultural Safety](#) training offered by the IPHCC, [The Active Offer of French Language Health Services](#) offered by the RMEFNO (available in EN & FR), [LGBT2SQ Foundations](#) course from Rainbow Health Ontario, [Black Governance and Leadership Project training](#).

► EVIDENCE

Use this space to record the highlights of your discussions and present evidence to support your decisions. You may find it helpful to think about the particular strengths and weaknesses of your organization. (Use additional space, if required, to capture detailed conversations.)

▶ OVERALL RATING

Our organization reflects the communities we serve at every level, including Board, staff and volunteers, who participate in regular trainings to build capacity to advance health equity in the organization and community.



1	2	3	4	5
Not true at all: this statement doesn't describe our organization at all	Somewhat true: the work is at its initial stages	Fairly true: the work is progressing well	Mostly true: we've made significant progress but more work is required	Absolutely true: this statement describes our organization very well

▶ KEY AREAS OF ACTION

Key area of action	Lead	By when	Review date

<p>Make Health Equity a strategic priority</p>	<p>Develop a Health Equity profile: Identify local health inequities, gaps and needs</p>	<p>Identify and implement priority actions to help reduce health inequities</p>	<p>Review progress & assess impact</p>
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Self-assessment statement 3

We collect high quality socio-demographic and race-based data to understand and document health inequities, gaps and needs in the communities we serve.

► GUIDANCE

CONSIDER, FOR EXAMPLE:

- Does your organization take all possible steps to ensure that it collects high quality socio-demographic and race-based data?
- Do you analyze the data by priority populations to determine differentiated outcomes to inform planning, outcome evaluation and reporting?
- Is there a required socio-demographic and race-based data report for your Board? How do you use the report to inform your work?
- Do you know what factors are driving health inequities in your communities? Do you understand barriers to health care access and determinants of health people in your communities face?
- What other data sources do you use?
- Does your race-based data collection and analysis follows the OCAP principles (the First Nations principles of ownership, control, access, and possession of data) and also data standards developed by the Anti-Racism Directorate?

► EVIDENCE

Use this space to record the highlights of your discussions and present evidence to support your decisions. You may find it helpful to think about the particular strengths and weaknesses of your organization. (Use additional space, if required, to capture detailed conversations.)

▶ OVERALL RATING

We have an in-depth understanding of health inequities, gaps and needs in our communities. We collect high quality data designed to fit with current priorities. We have a high level of data analytical support to inform decision-making.

1	2	3	4	5
<p>Not true at all: this statement doesn't describe our organization at all</p>	<p>Somewhat true: the work is at its initial stages</p>	<p>Fairly true: the work is progressing well</p>	<p>Mostly true: we've made significant progress but more work is required</p>	<p>Absolutely true: this statement describes our organization very well</p>

▶ KEY AREAS OF ACTION

Key area of action	Lead	By when	Review date

Make Health Equity a strategic priority	Develop a Health Equity profile: Identify local health inequities, gaps and needs	Identify and implement priority actions to help reduce health inequities	Review progress & assess impact
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Self-assessment statement 4

We use the needs assessment and actively engage the people and communities we serve to identify actions that will help address health inequities and narrow gaps in service delivery.

► GUIDANCE

CONSIDER, FOR EXAMPLE:

- Do you use your needs assessment and data analysis to ensure your programs and services meet the unique needs of the communities you serve and help reduce the gaps in primary health care delivery for your priority populations?
- Do you actively engage the people and communities you serve in making decisions at every level of the organization, including the needs assessment, planning, co-design and delivery of programs and services? How do you ensure the knowledge and expertise of the communities you serve is recognized and used in decision-making?
- Do you ensure your resource allocation and staff training meet the linguistic, cultural and other needs of the diverse communities you serve?
- Does your organization work to build capacity to deliver equitable, trauma-informed, people-centred, and culturally safer care? Do you partner with other organizations that can support you in providing culturally safe care for certain populations?
- Do you work with local partners to help reduce health inequities and narrow gaps in service delivery? Have you identified gaps in partnerships and are working to address them?

► EVIDENCE

Use this space to record the highlights of your discussions and present evidence to support your decisions. You may find it helpful to think about the particular strengths and weaknesses of your organization. (Use additional space, if required, to capture detailed conversations.)

▶ OVERALL RATING

We have identified and agreed on action, based on our needs assessment. Our communities are actively involved in decision-making at every level of our organization and we work closely with local partners to help reduce health inequities.

1	2	3	4	5
<p>Not true at all: this statement doesn't describe our organization at all</p>	<p>Somewhat true: the work is at its initial stages</p>	<p>Fairly true: the work is progressing well</p>	<p>Mostly true: we've made significant progress but more work is required</p>	<p>Absolutely true: this statement describes our organization very well</p>

▶ KEY AREAS OF ACTION

Key area of action	Lead	By when	Review date

Make Health Equity a strategic priority	Develop a Health Equity profile: Identify local health inequities, gaps and needs	Identify and implement priority actions to help reduce health inequities	Review progress & assess impact
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Self-assessment statement 5

We collaborate with the broader community to advance health equity on a system level and ensure equity is an underlying goal of an integrated, high-performing health system.

► GUIDANCE

CONSIDER, FOR EXAMPLE:

- Are you involved in advocacy with different levels of government to advance public policy responses that will help address the root causes of health inequities in your communities? Do you have an advocacy policy that clearly outlines the roles of Board, staff and volunteers?
- Do you support and collaborate with organizations, community and local advocacy groups that are challenging the social, economic and environmental conditions that cause health inequities for marginalized communities, including Indigenous, Francophone, Black and racialized, and 2SLGBTQ+ communities?
- Do you support broader provincial, national and international movements that work to eliminate health inequities in Ontario and around the world?
- Do you understand your role in addressing systemic racism, especially against Indigenous and Black people, and work to support Indigenous, Black and racialized communities and advance anti-racism and anti-oppression work?
- Do you follow the principles of [Indigenous Health in Indigenous Hands \(IH2H\)](#)? Do you work to build allyship relationships with Indigenous organizations and communities, and support Indigenous-led calls for changes in health policies and practices to be more respectful of the rights and knowledge of Indigenous people?
- Have you reviewed the [Black Health Strategy](#), developed by Alliance members, discussed your organization's role in moving it forward and agreed on action points?

► EVIDENCE

Use this space to record the highlights of your discussions and present evidence to support your decisions. You may find it helpful to think about the particular strengths and weaknesses of your organization. (Use additional space, if required, to capture detailed conversations.)

▶ OVERALL RATING

We have strong partnerships with the broader community to advance health equity on a system level. We are actively involved in advocacy and anti-racism and anti-oppression work. We make every effort to follow the IHH principles.



1	2	3	4	5
Not true at all: this statement doesn't describe our organization at all	Somewhat true: the work is at its initial stages	Fairly true: the work is progressing well	Mostly true: we've made significant progress but more work is required	Absolutely true: this statement describes our organization very well

▶ KEY AREAS OF ACTION

Key area of action	Lead	By when	Review date

Make Health Equity a strategic priority	Develop a Health Equity profile: Identify local health inequities, gaps and needs	Identify and implement priority actions to help reduce health inequities	Review progress & assess impact
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Self-assessment statement 6

We are continuing to review and assess progress, and have made Health Equity Self-Assessment an on-going process in our organization.

▶ GUIDANCE

CONSIDER, FOR EXAMPLE:

- Do you have evaluation strategies that measure your health equity efforts and health equity results to continually improve your practices?
- Do you have a process in place to review the impact and take further action if needed?
- How are you involving clients and communities in the evaluation process?
- Do you regularly report organizational progress to your communities, funders, members, partners, and Alliance membership?
- How committed is your Board to making Health Equity Self-Assessment a key part of planning, delivering and evaluating services?
- How are you assessing whether the changes you have made are sufficient to reduce local health inequities?

▶ EVIDENCE

Use this space to record the highlights of your discussions and present evidence to support your decisions. You may find it helpful to think about the particular strengths and weaknesses of your organization. (Use additional space, if required, to capture detailed conversations.)

▶ OVERALL RATING

We have been regularly evaluating our health equity efforts, and are committed to ensuring that effective health equity self-assessment process is used to support planning, delivery and evaluation of services.

1	2	3	4	5
<p>Not true at all: this statement doesn't describe our organization at all</p>	<p>Somewhat true: the work is at its initial stages</p>	<p>Fairly true: the work is progressing well</p>	<p>Mostly true: we've made significant progress but more work is required</p>	<p>Absolutely true: this statement describes our organization very well</p>

▶ KEY AREAS OF ACTION

Key area of action	Lead	By when	Review date

Health Equity Charter — Self-Assessment Overview

STATEMENT	1 Not true at all: this statement doesn't describe our organization at all	2 Somewhat true: the work is at its initial stages	3 Fairly true: the work is progressing well	4 Mostly true: we've made significant progress but more work is required	5 Absolutely true: this statement describes our organization very well
We understand the importance of addressing health inequities and demonstrate organization-wide commitment to advancing health equity.					
The Board and staff are well equipped to advance health equity in the organization and broader community.					
We collect high quality, socio-demographic and race-based data to understand and document health inequities, gaps and needs in the communities we serve.					
We use the needs assessment and actively engage the people and communities we serve to identify actions that will help address health inequities and narrow gaps in service delivery.					
We collaborate with health partners and the broader community to advance health equity on a system level and ensure equity is an underlying goal of an integrated, high-performing health system.					
We are continuing to review and assess progress, and have made Health Equity Self-Assessment an on-going process in our organization.					

Health Equity Charter Progress Report

The **Health Equity Charter Progress Report** is to be filled out after you complete self-assessment and submitted to the Alliance to enable joint learning and resource sharing. The Alliance will use the report to profile examples of the work you are doing to advance health equity and share them across membership and with the broader health equity community through multiple channels. The report will also help identify and develop additional tools and resources.

Organization: _____

Contact person: _____

What are the three successes you have achieved advancing health equity in your organization, broader community and on a system level? (200 words or less)

What are the key areas for action you have identified through the Health Equity Self-Assessment process? (200 words or less)

How can the Alliance further support your Health Equity work?

Other comments/questions

Board Chair (name, signature): _____

Date: _____

Please submit to Gabriela Panciu at gabriela.panciu@allianceON.org

Transformation Black LEARNING Health

Francophones Anti-
Health oppression
Equity Framework

COMMUNITY-CENTREDNESS

Diversity
Collaborate



**Alliance for
Healthier Communities**

*Advancing Health
Equity in Ontario*

500-970 Lawrence Avenue West
Toronto, ON M6A 3B6
416-236-2539

www.AllianceON.org

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