

# Health Equity Review Planning Tool



**Washington State Department of Health  
Division of Prevention and Community Health  
Office of Healthy Communities**

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## **Important Factors that Contribute to Health Equity**

### **Healthy living conditions and community space for all residents**

- Access to healthy food
- Safe and affordable housing
- Supportive neighborhoods
- Healthy indoor and outdoor places, such as businesses and schools
- Access to safe, clean, and quality outdoors, such as parks, trees, and playgrounds

### **Equitable opportunities in education, jobs, and economic development**

- Early childhood development services and community supports
- Education that provides high quality and culturally appropriate education for each student
- Job training and jobs that provide all residents a livable income
- Community economic development that supports local homes, businesses, and land

### **Reliable public services and safety**

- Public safety that includes fire, police, emergency medical services, health care systems, and code enforcement.
- Law and justice system that provides equitable access and fair treatment for each person
- Transportation that provides everyone with safe, efficient, affordable, convenient, and reliable transportation (public transit, walking, carpooling, biking, and driving)
- Health and human services that are high quality, affordable, and culturally appropriate

### **Non-discriminatory practices in organizations**

- Organizations routinely assess and eliminate all forms of intentional or unintentional policies or practices that negatively impact people based on the person's race, gender, sexual orientation, gender, disability, gender identity, national origin, income, and ability to speak or write English

**See Appendix A for more specific information about these factors.**

**Acknowledgments:** The Health Equity Planning Tool is a modification of the King County Equity and Social Justice Initiative's Equity Impact Review Toolkit. The Guide was modified and streamlined by members of the Health Equity Team for application at diverse settings and ease of use. The Health Equity Team is based at the Washington State Department of Health, Office of Healthy Communities.

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## Introduction

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The Health Equity Review Planning Tool is to use when you plan public health projects or policies. It will help you assess potential impacts of your proposals on health equity.<sup>1</sup> Specifically, you will be guided to:

- Assess the potential impact on various communities or populations before you make decisions.
- Better understand the different impacts of proposals.
- Identify ways to modify proposed policies or projects to ensure they will reduce health inequities, not make them worse.
- Strengthen or initiate relationships and collaborations.

### How do I use this tool?

The tool consists of a series of worksheets, each building on the previous ones. The worksheets are intended to focus discussions and document proposals. Follow the directions on each worksheet as you develop and refine your proposal.

### Worksheets for assessing and refining project health equity impacts

Use the worksheets on the following pages to identify the ways a proposed policy, intervention, or project will impact health equity. ([Link to Microsoft Word version of the worksheets](#))

**Worksheet 1: Summarize the proposed policy or project**

**Worksheet 2: Identify and assess who will be affected**

**Worksheet 3: Describe intended positive and potential negative impacts**

**Worksheet 4: Analyze potential actions and prioritize**

**Worksheet 5: Modify proposal, plan evaluation, and determine final recommendations or decisions**

<sup>i</sup> Health equity is achieved when all people have the opportunity to attain their full health potential and no one is disadvantaged because of their social position or other socially determined circumstances. Bravement, PA, Monitoring equity in health and healthcare: a conceptual framework. *Journal of health, population and nutrition*, 2003. 21(3) p.181.

## Role of the Community

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The success of your proposal and ability to address health inequities depends on the information you gather from community sources. An effective health equity planning process requires the **early** and continued involvement of members of the affected communities.

### **Community members bring important contributions to the planning process, such as:**

- Knowledge of the community
- Perspectives on how proposed projects may both positively and negatively impact the community
- Insight into potential barriers to achieving the goals and possible ways to reduce barriers
- Knowledge of the resources available in the community, including key contacts, potential partners and funding

Unless you have spent time establishing relationships and building trust within a community, you may encounter more challenges to involving community members. This process takes time, sometimes several years. In the past, communities may have had negative experiences when approached for information or support for a grant or project. Staff may not have really listened and incorporated community ideas into plans or may have disappeared as soon as the grant ended. The community may feel used or mistreated and reluctant to open themselves up to similar experiences.

If you do not already have relationships with a community group, meet with gate keepers and other leaders in the community to respectfully seek their advice. Do they think this project will help their community? How should you proceed? These leaders may have different ideas about the community's real needs than what your proposal is focused on. It's important to do what you can to honor their views, rather than press your ideas and agenda on them.

### **Some questions to consider:**

- For which community groups are the impacts greater?
- What is the history of this issue in the community?
- What do the affected communities think are the most important issues?
- Who is already working on this issue?
- Who else needs to be at the table?
- Who needs a voice or advocate?
- How does this proposal fit with community priorities?

## Worksheet 1-a: Summarize the proposed policy or project

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[\(Link to a Microsoft Word version of the worksheets\)](#)

Summarize the key elements of your proposal.

1. Briefly describe the policy or project you want to do:

2. List expected outcomes of this policy or project:

a.

b.

c.

3. Identify target audiences/populations that might be affected by the proposal:

a.

b.

c.

4. Determine geographic locations:

## Worksheet 1-b: Consider the impact

Select the factors your proposal may affect. A proposal may impact many factors or just one.

Factors that contribute to health equity	Check all that apply
Access to healthy food	
Access to safe, affordable, housing for all people	
Supportive neighborhoods	
Healthy indoor and outdoor places	
Access to safe, clean, and quality indoors or outdoors, such as parks, trees, and playgrounds	
Early childhood development services and community supports	
Education that provides high quality and culturally appropriate education for each student	
Job training and jobs that provide all residents a livable income	
Community economic development that supports local homes, businesses, buildings and land	
Public safety that includes fire, police, emergency medical services, and code enforcement	
Law and justice system that provides equitable access and fair treatment for each person	
Transportation that provides everyone with safe, efficient, affordable, convenient, and reliable transportation	
Health and human services that are high quality, affordable, and culturally appropriate	
Organizations routinely assess and eliminate all forms of intentional or unintentional policies or practices that have negative impacts related to race, gender, ethnicity, people with low income, people with disabilities, national origin, sexual orientation or gender identity	
Other (describe)	

### Other questions to consider:

- Based on Worksheet 1-b, list the positive and negative factors that relate to your proposal.
- How would the proposed project or policy improve or harm the target population's relationship to these factors?
- How are you evaluating the type and size of the potential positive or negative impacts?

## Worksheet 2: Identify and assess who will be affected

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This worksheet helps you more specifically identify populations that will likely be affected by the proposal. Complete Worksheet 2 with community members on your planning committee or in consultation with people from these populations. See the **Role of the Community** section on page 2 for more information about how to involve community members. At the end of this worksheet you should be able to identify how communities may have positive or negative impacts from your proposal.

### A. Questions

- Are the impacts greater for certain communities such as people with low incomes, racial and ethnic groups, or communities with limited English proficiency?
  
- What has been the history of this issue in the community?
  
- Who is already working on this issue?
  
- Who else needs to be at the table?
  
- Who needs a voice or an advocate?
  
- What do the people affected by this proposal think the important issues are?
  
- How does this proposal fit with their priorities?

**B. Gather and review data (quantitative and qualitative) related to the project and the populations that will be impacted**

The following sources may be helpful:

- 2010 Census data—population characteristics, demographics (income level, race/ethnicity, age, education, language)
- Behavioral Risk Factor Surveillance System (BRFSS)
- Geographic Information Systems (GIS) maps
- Public health data (data your program or agency collects)
- Free and Reduced Lunch Eligibility data
- Healthy Youth Survey data
- Data on clients or consumers of services
- Data on community partners or contractors who provide services
- Relevant research or literature

Summarize findings from key data sources related to your proposal.

**C. Meet with community members to respectfully seek their advice and information about the community related to the proposal**

List community members you have involved and consulted and the key information they provided.

**D. Create maps and detailed descriptions of audiences potentially impacted**

Using data gathered above, develop charts, tables or graphs to describe each audience. List the data sources you used.

**E. Continue to prioritize**

Which communities may need additional support or resources as a result of your proposal?



### Worksheet 3: Describe positive and negative impacts

Use data you've gathered for each population and factors contributing to health equity you have selected. Fill out the table below for each factor you have selected. Consider actions that can enhance the positive impacts and reduce or eliminate negative impacts.

Factor:				
Population(s) Impacted	Positive/Beneficial Impacts		Negative/Adverse Impacts	
List each population that will be affected by your proposal	List the positive impacts for each population	List actions to enhance positive impacts	List the negative impacts for each population	List actions to reduce or eliminate negative impacts

## Worksheet 4: Analyze potential actions and prioritize

This worksheet will help you analyze the various action steps you identified on Worksheet 3 and consider the feasibility of these actions. Once again, this step should be done with the affected populations and communities. Your analysis will help you select the most feasible actions and whether to modify or drop your original proposal.

Action needed to enhance positive impacts or reduce negative impacts.	How critical is this action to the success of this intervention?	Resources and time needed to implement?	What is your access to each of these resources?	Is the proposal feasible given other constraints such as approval by agencies, politics, Human Subjects Review	Relative priority of these actions?

## **Worksheet 5: Modify proposal, plan evaluation, and determine final recommendations or decisions**

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**A. Using information from Worksheet 4, list the priority actions that you have identified for the success of your policy or project.**

**B. Identify measures you will use to evaluate the impact of your proposal on health equity.**

**C. Describe how your original proposal needs to be adjusted, modified or dropped.**

**D. Describe final recommendations or decisions made as a result of this process.**

**E. List the names, titles, and organizations of those who actively participated in this equity impact review process.**

## **Appendix A: Determinants of Health Equity**

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Determinants of Equity are social, economic, geographical, political, and physical environment conditions in which people are born, grow, live, work, and age that lead to the creation of a fair and just society.

### **Healthy living conditions and community space**

- Food systems that support local food production and provide access to affordable, healthy, and culturally appropriate foods for all people
- Housing for all people that is safe, affordable, high quality, and healthy
- Neighborhoods that support all communities and individuals through strong social networks, trust among neighbors, and the ability to work together to achieve common goals for improving the quality of life for everyone in the neighborhood
- Healthy built and natural environments for all people that include mixes of land use supporting jobs, housing, amenities and services, trees and forest canopy, and clean air, water, and soil
- Parks and natural resources that provide access for all people and communities to safe, clean, and quality outdoor spaces, facilities, and activities

### **Fair opportunities in education, jobs and economic development**

- Early childhood development that supports nurturing relationships, high-quality affordable child care, early learning opportunities, and school readiness for all children
- Education that provides high quality and culturally appropriate opportunities allowing each student to reach his or her full learning and career potential
- Job training and jobs that provide all residents with the knowledge and skills to compete in a diverse workforce and with the ability to make sufficient income for the purchase of basic necessities to support them and their families
- Community economic development that supports local ownership of assets, including homes and businesses, and assure fair access for all to business development and retention opportunities

### **Reliable public services and safety**

- Community and public safety that includes services such as fire, police, emergency medical services, and code enforcement that are responsive to all residents so everyone feels safe to live, work, and play in any neighborhood
- Law and justice system that provides equitable access and fair treatment for all
- Transportation that provides everyone with safe, efficient, affordable, convenient, and reliable mobility options, including public transit, walking, carpooling, and biking
- Health and human services that are high quality, affordable, and culturally appropriate, and support the optimal well-being of all people

### **Non-discriminatory practices in the agency**

- Equity in agency practices that eliminates all forms of discrimination in agency activities in order to encourage participation, and provide fair treatment for all employees, contractors, clients, community partners, residents, and others

## Key Definitions

- **Health Disparity** is a difference in health status between distinct segments of the population including differences that occur by age, sex, race or ethnicity, sexual orientation, education or income, disability, or geographic locale.
- **Health Inequity** is disparity in health or health care that is systemic and avoidable and, therefore, considered unfair or unjust.
- **Health Equity** means achieving the highest level of health for all people. Health equity calls for focused efforts to address avoidable inequalities by creating fair opportunities for optimal health for all groups, especially for those who have experienced socioeconomic disadvantage or historical injustices.
- **Determinants of Equity** are social, economic, geographical, political, and physical environment conditions in which people are born, grow, live, work, and age that lead to the creation of a fair and just society.

