

# Tool 3: Health Equity Assessment Support Tool

This is more detailed guide for those responsible to create service or program plans. It includes guided notes to support your response in each section.

<b>What Service/ Programme/ project is being assessed?</b>	
<b>Date the assessment is completed</b>	
<b>Contact person's detail</b>	
<b>Strategic Lead</b>	
<b>Your Steps</b>	Guided notes to support your response to relevant steps
<ul style="list-style-type: none"> <li>• <b>Prepare: agree the scope of your service/programme or project &amp; gather the information that you need.</b></li> </ul>	
<b>State your aim. How do you expect your service or programme to reduce health inequalities?</b>	<p><i>When preparing your aim, think about what you are going to improve? and what good looks like? Be Clear and concise. You can use SMART to help you:</i></p> <p><b>S</b>pecific - What will be accomplished? What actions will you take?</p> <p><b>M</b>easurable - What data will measure the goal? (how much? how well?)</p> <p><b>A</b>chievable - Is the goal doable? Do you have the necessary skills and resources?</p>

	<p><b>R</b>elevant - How does the goal align with broader goals? Why is the result important?</p> <p><b>T</b>ime-bound - What is the time frame for accomplishing the goal?</p>
<p><b>What are the key sources of data, and evidence that allow you to identify Health Inequalities in your service, programme, or project?</b></p>	<p><b>Potential sources to consider &amp; collect:</b></p> <p>Your service/ general practice data – (if this is an existing service)</p> <p>Your local data (local needs assessments, local areas profiles, your service internal records, any local performance, or qualitative data available from relevant or similar services or programmes, health equality impact assessment, equality impact assessment)</p> <p>Any local or national research</p> <p>Nationally available data can be found on various measures. <a href="#">Check appendix 1</a> for sources of data.</p>
<p><b>Have you identified a lead / or champion within your group/ team/ service/ or organisation to drive inequalities agenda and plan?</b></p>	<p>A rapid review of evidence by Care Quality Commission on tackling health inequalities through services and organisations found that strong leadership is one of the key enablers to address health inequalities and recommends that organisations should have a named strategic lead/ or champion.</p> <p><a href="#">Rapid evidence review: Tackling inequalities through the regulation of services and organisations - Care Quality Commission (cqc.org.uk)</a></p>
<p><b>• Assess: examine the evidence and data to assess the following:</b></p>	
<p><b>Do you understand your population?</b></p> <p><b>Who are they?</b></p>	<p>Think about Who experience inequity and inequality the most that needs addressing? Consider multiple dimensions of inequalities, including but not limited to:</p> <ul style="list-style-type: none"> <li>• Geography (variation in urban and rural populations)</li> <li>• Socio economic status and deprivation (e.g., unemployed, low income, deprived areas)</li> </ul>

	<ul style="list-style-type: none"> <li>• Protected characteristics in the equality duty</li> <li>• Inclusion health and vulnerable groups: <ul style="list-style-type: none"> <li>○ People experiencing homelessness.</li> <li>○ People in contact with the criminal justice system</li> <li>○ Sex workers</li> <li>○ Refugees and asylum seekers</li> <li>○ Gypsy, Roma, and traveller communities</li> </ul> </li> </ul> <p>People living in your most deprived 20% postcodes?</p> <p>Those with protected characteristics?</p> <p>Your inclusion health groups?</p> <p>Your rural population</p> <p>Who miss appointments regularly?</p> <p>Whom have you lost to follow up?</p> <p>Have you done a health and inequality impact assessment yet? If you have completed them your findings should inform your answers to this question. If not, this is suitable time to do them.</p>
<p><b>What are their needs?</b></p>	<ul style="list-style-type: none"> <li>• In your identified Population/ group(s): <ul style="list-style-type: none"> <li>○ Which health condition(s) or lifestyle factors drives most inequalities?</li> <li>○ Which process of care contributes to the problem?</li> <li>○ Have you identified any specific barriers to care?</li> <li>○ Which patient experience needs to be improved?</li> <li>○ Are financial resources allocated equitably to support health equity initiatives?</li> <li>○ Any other needs based on their social circumstances (social determinant of health)?</li> <li>○ What are their unmet needs?</li> <li>○ Have you spoken to people &amp; organisations in your area who might have soft local knowledge?</li> </ul> </li> </ul> <p>If you are already collecting patient experience feedback, those findings should inform part of your assessment at this stage.</p> <p>Here is the link to the NHS Wales experience questionnaire V2 for information <a href="https://www.nhs.uk/framework-for-assuring-service-user-experience/">Framework For Assuring Service User Experience (nhs.wales)</a></p> <p>Social determinants of health screen for factors such as food security, employment status, and social support. You may not be able to address these on your own. Think about how you can Connect patients / service users with community resources to address these needs.</p>

<p><b>Combining the 'who' and 'what' in the above two steps, have you identified your priority population(s)/ group(s) or patient(s)</b></p>	<p><i>State your priority population and their needs here.</i></p>
<p><b>Plan and Act: Now that you identified your priority groups &amp; their needs, this is the time to think what you are going to do and how you are going to address your identified issues or priorities?</b></p>	
<p><b>What</b> could be improved? E.g. a service, project, or a pathway etc</p>	<p><i>Think about the following points:</i></p> <p><i>Have you looked at the evidence of what interventions work?</i></p> <p><i>Do you know what services and pathways already exist in your area?</i></p> <p><i>Are service pathways accessible?</i></p> <p><i>What barriers have you considered?</i></p> <p><i>Are services in the right place? Right time?</i></p> <p><i>Are your pathways equitable?</i></p> <p><i>What does patient experience tell on what improvements they would like to see?</i></p>
<p><b>How</b> are you going to address your identified priority?</p>	<p>Think about the following:</p> <ul style="list-style-type: none"> <li>• Have all relevant people been included in your planning?</li> </ul> <p>Improvement Cymru Academy Toolkit Guide on <a href="#">involving others</a> is a useful tool to help your thinking on identifying and including relevant people.</p> <ul style="list-style-type: none"> <li>• Have you got sufficient resources? (you might have a long list of resource however your workforce and funding need specific attention)</li> </ul>

- Do you have an allocated budget? What is the source and for how long?
- Does your costing information and budget allocation draw in data on health inequalities (such as WIMD, ethnicity, multiple co morbidities, and wider determinant of health).

Although relevant to England, the following resource is a useful read and has some relevant key points that might be helpful in supporting your thinking around funding and financing related to health inequalities ([Bringing it all together: Financial strategies that address health inequalities](#))

- Can your staff confidently signpost service users to social services and or relevant third sector organisations for support?

Regularly train staff on health equity, inclusion health, cultural competence, and implicit bias. Check the directory of education for relevant courses on health inequalities & inclusion health. [Directory of Education and Training in Inclusion Health for Health Professionals - Primary Care One \(nhs.wales\)](#)

Information about local support services can be found on local authority websites. Dewis Cymru also provides helpful information about health and social care services and supports in your area, and you can search by postcode <https://www.dewis.wales/>. Your Local Voluntary Councils (LVC) can help too. Each local authority areas in Wales have one.

- Are you effectively engaging with the communities you serve?

Build partnerships with community organisations to enhance resource availability and support for patients. Advocate for policies that promote health equity and address social determinants of health on a systemic level. Your local authorities and your local voluntary councils usually have named equality leads. Contact them to find out who is working on equity and equality agenda who could link you with relevant community groups as identified in your priorities in the first stage.

- Who else can help you at this stage? Could you use civic, service and community centred interventions & to tackle the problem and maximise your reach to large population at scale?
- Can you co design?

- **Are** you collecting the necessary data to

Think about the following:

<p>monitor your progress?</p>	<ul style="list-style-type: none"> <li>• Which group or who experience health inequity the most?</li> <li>• Are you collecting demographics (are you recording age, gender, ethnicity, postcode, socioeconomic status)</li> <li>• Which health outcomes you need to record?</li> </ul> <p>You would have already noticed data questions in each section, this is because the data is one of the key aspects of your plan that would help you at different stages. The question might look the same, but the purpose would be different in each stage of your project or programme planning and delivery.</p>
<ul style="list-style-type: none"> <li>• <b>How</b> is your service, programme, or project likely to affect health inequalities (positively or negatively)?</li> <li>• <b>Could</b> your intervention (S) increase health inequalities?</li> </ul>	<p>Consider the cause of these inequalities. What are the wider determinants of health that drives inequality in your identified population group.</p> <p>Think about whether outcomes vary across groups, and who benefits most and least.</p> <p>Consider both positive and negative impact of your service on your identified population.</p> <p><b>Caution your plan could widen inequalities by:</b></p> <ul style="list-style-type: none"> <li>• Focusing too much on <b>individual level actions</b>, which is likely to be done by affluent groups.</li> <li>• Not tackling <b>the wider and full spectrum of causes</b> – you cannot do this on your own but your wider partners in local authorities, 3rd sector, social services and others can support. find your key stakeholders with common interests and goals and seek their support. Plan your project / service in collaboration (find your tribe and trust them)</li> <li>• Relying too much on <b>professional – led intervention only</b>.</li> <li>• Not tackling the <b>root causes</b> of health inequalities</li> <li>• No considerations for <b>Cost of intervention</b>: (for primary care as well as members of the public): Some health interventions, even when subsidized, might still entail out-of-pocket expenses (e.g., transportation, time off work) that poorer individuals cannot afford.</li> <li>• No considerations for <b>opportunity Costs</b>: Individuals with lower incomes may prioritize immediate financial needs over health interventions that do not provide immediate benefits.</li> </ul> <p>Not considering:</p>

	<ul style="list-style-type: none"> <li>○ cultural beliefs and attitudes: Diverse cultural attitudes towards healthcare can influence how different groups perceive and engage with interventions. Minority or disadvantaged groups might have less trust in the healthcare system or face cultural barriers to participation.</li> <li>○ Social Support: Higher socio-economic groups often have better social support systems that facilitate adherence to health interventions. consider how you could potentially promote that in your areas of deprivation and with groups who have multiple and complex needs.</li> </ul>
<ul style="list-style-type: none"> <li>• How will you monitor &amp; evaluate the effect of your service / project/ programme on different population groups at risk of health inequalities?</li> <li>• What output or process measures could you consider?</li> <li>• What outcome measure could you consider?</li> </ul> <p>How well you know if health inequalities have been reduced?</p>	<p>In your evaluation consider variations based on multiple dimensions of inequalities as you identified in your assessment stage.</p> <p>Reach out to your local public health team &amp; or local universities to provide you with advice and support on your evaluation plan.</p>
<p><b>Review – make sure you have a good evaluation plan in place&amp; review your progress</b></p>	
<p><b>Have</b> you made a difference</p>	<ul style="list-style-type: none"> <li>• Have you achieved the change you wanted to?</li> <li>• How will you know if you have made a difference? (what does your data tell you?)</li> <li>• What will you do differently to drive improvements?</li> <li>• Did you identify any ripple effect?</li> <li>• Who can help you in your review and evaluation (think about local universities, local and or national public health teams) ideal to set aside at least 15% of your resource (budget for evaluation)</li> <li>• Has your intervention decreased or increased health inequalities?</li> </ul>

When answering questions at this stage you might want to consider the following as appropriate: how much your intervention:

- Supported reducing health inequity in your service provision, processes, pathways, and patient experience?
- Supported reductions in overall inequalities associated with physical & mental health?
- Promoted equality, diversity and inclusion across communities and your identified priority groups.
- Are you able to demonstrate the return on investment (economic or social)
- Have you been able to maximise the outcomes which matter to people at the lowest possible cost?

## Reflections

## Appendix 1 Data sources:

Datasource	Detail	Link
<b>Welsh Index of Multiple Deprivation (WIMD)</b>	The Welsh Index of Multiple Deprivation (WIMD) is the official measure of relative deprivation for small areas in Wales. It identifies areas with the highest concentrations of several different types of deprivation. It is a National Statistic produced by statisticians at the Welsh Government.	<a href="#">WIMD - Home Page (gov.wales)</a>
<b>StatsWales</b>	Detailed official data on Wales “almost equivalent to ONS”: Population; health and social care; primary care, Pharmacy, Optometry community safety and inclusion; equality and diversity; housing; education and skills; environment and countryside; economy and labour market.	<a href="#">Catalogue (gov.wales)</a> <a href="#">Deprivation at GP cluster level (gov.wales)</a> <a href="#">GMS contract (gov.wales)</a>
<b>Public Health Observatory</b>	Includes the main source of data, data analysis and evidence review and guidance.	<a href="#">Observatory - Public Health Wales (nhs.wales)</a>  Link to primary care Clusters dashboard <a href="#">Primary Care Clusters Dashboard - Public Health Wales (nhs.wales)</a>
<b>Primary Care Division- inequality and inclusion health data pages</b>		
<b>Health Education and Improvement Wales Data &amp; Analytics portal</b>	The dashboards include information on Workforce, population pyramid, mental health workforce and insight into GP training Data on current and future estimates over time. It also includes Census data.	<a href="#">HEIW Data and Analytics Portal</a> <a href="#">Population Dashboard - Power BI</a>
<b>National Survey for Wales</b>	The National Survey for Wales involves around 12,000 people each year and covers a wide range of topics. It runs all year round, across the whole of Wales. The results are	<a href="#">National Survey for Wales   GOV.WALES</a>  <a href="#">Adult lifestyle (National Survey for Wales)   GOV.WALES</a>

	<p>used by the Welsh Government to help make Wales a better place to live.</p> <p>Their health and social care bulletin reports on people's use of and satisfaction with GP surgeries and hospital services.</p>	<p><a href="#">Hospital and GP services (National Survey for Wales): April 2021 to March 2022   GOV.WALES</a></p>
<b>Health Maps Wales</b>	<p>Explore a wide range of health indicators by area, map trends in data over time and make comparisons at local and national levels. (Mainly focused on illness and disease as opposed to wellbeing): Hospital admissions; cancer mortality; A&amp;E attendances; outpatient referrals; illicit drug use admissions; common procedure waiting times;</p>	<p><a href="#">DHCW – Welcome to Health Maps Wales</a></p>
<b>InfoBase Cymru</b>	<p>is an interactive web-based tool that provides easy access to a wide range of statistics covering many themes including people, economy, education, health, housing, and crime. People, communities, and equalities; employment and business; children, young people and education; health and social care; environment and sustainability; local government; Census. It also includes data on the number of Asylum seekers in each local authority.</p>	<p><a href="#">Home - InfoBaseCymru</a></p>
<b>Welsh Government Statistics</b>	<p>Publishes a large variety of indicators relating to the health of the population of Wales and the wider determinants of health. As well as information about primary care workforce.</p>	<p><a href="#">Statistics and research   GOV.WALES</a></p>
<b>Primary Care information Portal</b>	<p>Includes cluster level &amp; GP level data for chronic conditions, prescribing, vaccination and immunisation, screening and GMS contract data.</p>	<p><a href="#">Primary Care Information Portal (wales.nhs.uk)</a></p>
<b>Wales Rural Observatory</b>	<p>includes rural statistics and research at the local authority level.</p>	<p><a href="#">Rural Statistics   Wales Rural Observatory</a></p>
<b>The community Wellbeing Index</b>	<p>Gives an insight into what's important to people in a local community. From the quality of education, housing affordability,</p>	<p><a href="#">Home   Wellbeing Index (coop.co.uk)</a></p>

	<p>and public transport – to the amount of green space and the number of community centres in an area. They have gathered data for over 28,000 communities across the UK, to understand how they score across these and many other wellbeing measures.</p>	<p>You can enter your postcode and check your community's wellbeing score see example:</p>  <p>The infographic shows a 'Your Community Wellbeing score is: 67' with a national average of 52. It lists 'Your highlights' for Education and learning (94), Health (81), and Equality (80). A grid of 9 categories compares local scores to national averages: People (94 vs 53), Place (74 vs 54), Relationships (49 vs 53), Education and learning (81 vs 49), Health (67 vs 49), Equality (80 vs 81), Economy, work and employment (63 vs 51), Housing, space and environment (58 vs 55), and Voice and participation (35 vs 49).</p> <p>For more information visit <a href="http://www.coop.co.uk/wellbeing">www.coop.co.uk/wellbeing</a></p>
<p><b>ONS census 2021 interactive maps</b></p>	<p>Population numbers; general health; employment status; household composition; ethnicity; religion; care providers.</p>	<p>You can enter your postcode or town name to build your areas profile <a href="#">Build a custom area profile - Census 2021, ONS</a></p>
<p><b>National Survey for Wales</b></p>	<p>Lifestyle behaviours; service use; community, culture and Welsh language; local area and environment; internet and media; children and education; sport and recreation; finances.</p>	<p><a href="#">National Survey for Wales   GOV.WALES</a></p>
<p><b>Fuel Poverty dashboard from Gov Wales</b></p>	<p>Shows fuel poverty estimations in Wales</p>	<p><a href="#">Fuel poverty in Wales: interactive dashboard   GOV.WALES</a></p>
<p><b>Poverty Data Dashboard</b></p>	<p>It has been designed and produced by Data Cymru to bring together data relating to poverty measure across key WIMD themes for each local authority.</p>	<p><a href="#">A view of poverty - Data Cymru</a></p>
<p><b>Wales Strategic Migration Partnership (WSMP)</b></p>	<p>The WSMP is hosted by the Welsh Local Government Association (WLGGA) to reflect the Partnership's All-Wales role around migration, and to help foster closer working with public services and the 22 councils in Wales, linking in with local government's political structures and local priorities. The site includes the following data:          Number of Asylum seekers by LA, up to 2022          Number of refugees resettled under Syrian Vulnerable Persons Resettlement Programme by LA (between 2015-2021)</p>	<p><a href="#">Partneriaeth Mewnffudo Strategol Cymru   Wales Strategic Migration Partnership (wsmp.wales)</a></p>

	It also includes some stories and case studies	
<b>Other Sources of data for asylum seekers and refugees</b>	Various sources of data providing information on the number of asylum seekers and refugees at Wales and the local authority level.	<a href="#">Unaccompanied asylum-seeking children being looked after at the 31 March by local authority (gov.wales)</a>  <a href="#">Asylum and resettlement datasets - GOV.UK (www.gov.uk)</a>  <a href="#">Local data on migrants in the UK - Migration Observatory - The Migration Observatory (ox.ac.uk)</a>
<b>Homelessness and unstable housing</b>	Monthly reports on temporary accommodations and rough sleeping.	<a href="#">Homelessness accommodation provision and rough sleeping   GOV.WALES</a>  <a href="#">Deaths of homeless people in England and Wales - Office for National Statistics (ons.gov.uk)</a>
<b>Gypsy, Roma and Travellers</b>	<p>Data on the number of pitches by residential status, occupied status and local authority.</p> <p>Number of caravans by authorisation and local authority</p> <p>Number of sites by authorisation and LA</p> <p>Charts of the number of sites by authorisation in Wales</p> <p>Number of pitches by residential status, occupied status and LA</p>	<a href="#">Gypsy and Traveller caravan count (gov.wales)</a>  <a href="#">Tackling inequalities faced by Gypsy, Roma and Traveller communities - Women and Equalities Committee - House of Commons (parliament.uk)</a>
<b>People in contact with Criminal Justice</b>	Justice data includes the following: Justice in numbers, Criminal Justice System Statistics, Prison data, probation data, contracted services, courts and legal aid data and life after prison data on	<a href="#">Justice Data</a>  <a href="#">Wales approved premises - GOV.UK (www.gov.uk)</a>

	accommodation and employment in England and Wales.	<a href="#">Headline measures - Justice in numbers - Justice Data</a> <a href="#">Probation data - Justice Data</a> <a href="#">About the dashboard - CJS Dashboard (justice.gov.uk)</a> <a href="#">Probation Service England and Wales regional maps - GOV.UK (www.gov.uk)</a>
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## References:

- 1- Public Health Wales (2000). Health inequalities impact assessment: Planning for a positive impact [Planning for a Positive Impact \(phwwhocc.co.uk\)](#)
- 2- Public Health Wales (2020). Health Impact Assessment Template / record sheet. WHIASU [WHIASU HIA Workshop Record sheet.pdf \(phwwhocc.co.uk\)](#)
- 3- Public Health Wales. Equality and Health Impact Assessment template [PHW Equality & Health Impact Assessment.doc \(sharepoint.com\)](#)
- 4- Public Health England (2020), Health Equity Assessment Tool ( HEAT) – Public Health England [Health Equity Assessment Tool \(HEAT\): executive summary - GOV.UK \(www.gov.uk\)](#)
- 5- New Zealand (2008) The Health Equity Assessment Tool- New Zealand [The Healthy Equity Assessment Tool: A User's Guide](#)
- 6- Inclusion Health self-Assessment Tool for primary care networks [Inclusion Health Tool for Primary Care Networks - Friends, Families & Travellers \(inclusion-health.org\)](#)
- 7- Friends, Families and Travellers, Inclusion Health Self-Assessment Tool for Primary Care Networks! [Inclusion Health Tool for Primary Care Networks - Friends, Families & Travellers \(inclusion-health.org\)](#)
- 8- Health Care Quality Commission (2024). Rapid evidence review: Tackling inequalities through the regulation of services and organisations. [Rapid evidence review: Tackling inequalities through the regulation of services and organisations - Care Quality Commission \(cqc.org.uk\)](#).