



# The Health Equity Assessment Tool(HEAT)

A standardized tool to objectively assess  
the health equity impact of health  
transformation interventions

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Blue Shield of California

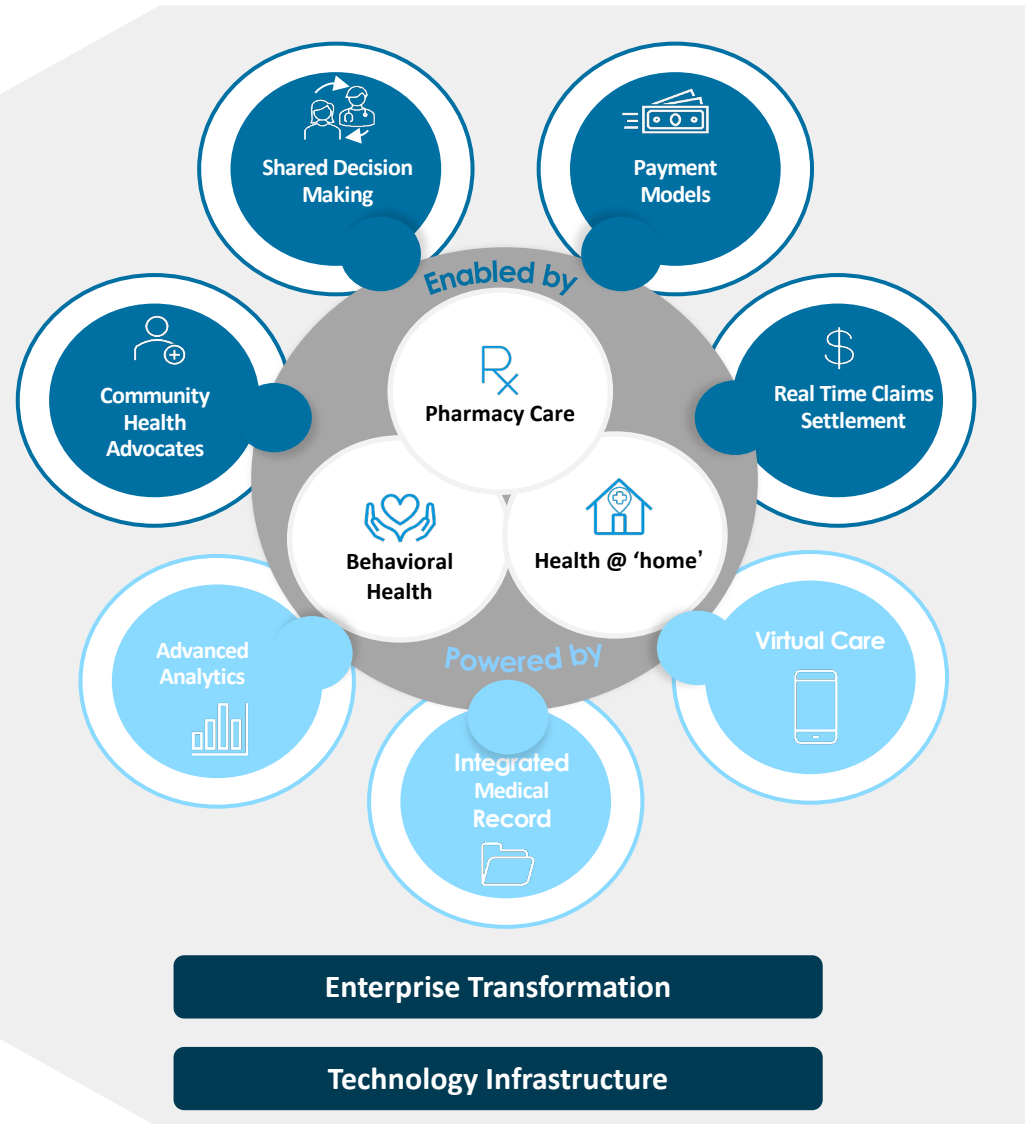
Presentation for SIREN National Research Meeting:  
Racial Health Equity in Social Care



# We are transforming the healthcare system



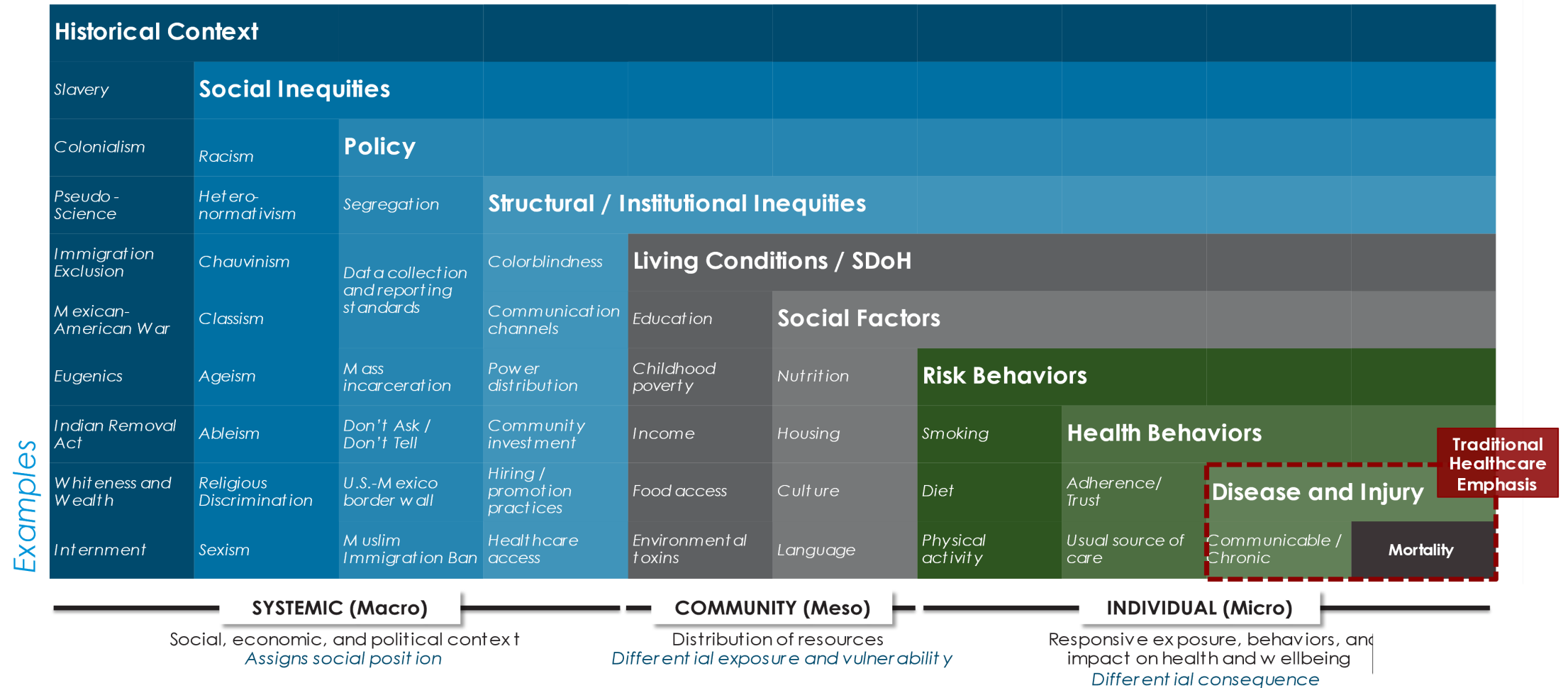
Health Reimagined



# Health equity is a crucial part of our strategy

## Drivers of Health Equity

Historical realities to contemporary health injustices



Sources: CDPH, OHE, WHO, Socioecological Model, and BAR HII Conceptual Framework



# Developing the Health Equity Assessment Tool

## Why did we develop the Health Equity Assessment Tool (HEAT)?



To address health inequities across and within CA communities



To measure progress towards building health equity into design, implementation, and evaluation



To track health equity impact across time and broadly throughout the organization

## What informed the HEAT design?



Review of peer-reviewed and grey literature



Internal and external subject matter experts



Refinement from testing with stakeholders

## How will we administer the HEAT?



Questionnaire with intervention implementation and design teams



Additional data collection for the HEAT



Designed to be implemented at least twice during an intervention

### Design

#### Initial (pre) HEAT

- Target audience: Intervention team
- Content: 4 domains, 11 Likert response questions
- Analysis: No score at this phase

### Implementation

#### Follow-up (full) HEAT

- Target audience: Intervention team
- Content: 6 domains, 15 Likert response questions
- Analysis: Weighted average domain score

### Post-Implementation

#### Follow-up (full) HEAT

- Target audience: Intervention team
- Content: 6 domains, 15 Likert response questions
- Analysis: Weighted average domain score



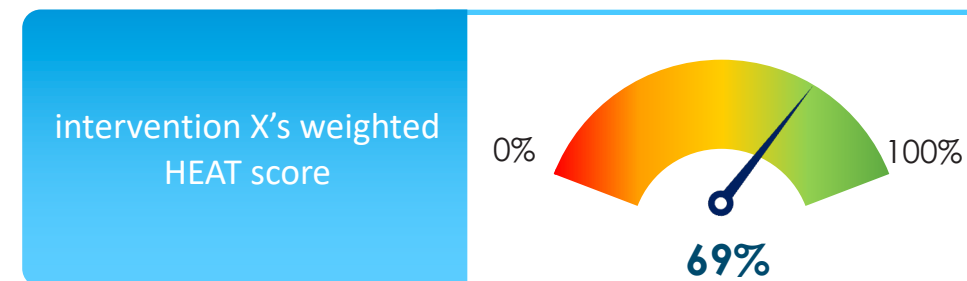
# Domains and indicators in the Health Equity Assessment Tool

Domain	Definition	Indicator			
1 Getting Rooted	Assess the intervention's relationship to Blue Shield's overall health equity approach	1-1 Engagement and application of elements of Blue Shield's health equity approach (e.g., the HEAL framework)	1-2 Quality of application of the Health Equity Action Lens framework		
2 Using Data	Assess the data informing design and implementation and the data collected through the intervention that would enable measurement of impact on health equity	2-1 Collection of race/ethnicity data related to the intervention	2-2 Collection of additional patient- or community-level data to inform health equity or impacts of the intervention for different groups	2-3 Consideration of potential biases in data collected and extent to which alternate sources are explored	2-4 Tracking members exposed to the intervention, including demographic data
3 Reducing Inequities: Process	Assess how much the intervention aims to reduce racial/ethnic and other inequities	3-1 Specification of an explicit purpose of addressing inequities or a way to ensure that the intervention does not create or perpetuate disparities	3-2 Identification of who is included/excluded from the intervention and efforts to "over" sample or target resources to specific groups		
4 Reducing Inequities: Impact	Assess the degree to which the intervention has different impacts on different subgroups	4-1 Observed differences in outcomes within and between subgroups at micro, meso, and macro levels	4-2 Evidence of narrowing equity gaps		
Domain 4 not included in Pre-HEAT					
5 Integrating Diverse Perspectives: Engagement	Assess how the intervention incorporates insights from those with lived experiences related to inequities	5-1 Individuals who experience inequities engaged in intervention implementation and evaluation phases	5-2 Input from the groups experiencing inequities incorporated in each phase		
6 Integrating Diverse Perspectives: Dissemination	Assess how findings are shared and with whom	6-1 Stakeholders engaged via a mechanism that facilitates greatest access (e.g., webinar, listserve, messages, etc.)	6-2 Evidence of including health equity learnings in an evaluation deliverable (i.e., brief/deck)	6-3 Feedback process to improve identification of stakeholders and communication approaches	
Domain 6 not included in Pre-HEAT					



# Health Equity Assessment Tool dashboard example

<b>Intervention Name</b>	Health Reimagined Initiative
<b>Practice/Site and Location</b>	Urban area in Southern and Northern CA
<b>How long was the intervention implemented before the HEAT was applied?</b>	Testing Phase (6mo, 1 year, 2 years?)



## Interpreting intervention X's HEAT Score

The overall score shows that health equity principles are *integrated* in your intervention.

### Key Performance Drivers

This intervention's overall score was strengthened by achievements in the areas of Domains 1, 2, and 3. The intervention performed particularly strongly due to the data collected to measure the intervention's impact on health equity, integration of stakeholders and data to understand the problem(Domain1) and processes to measure impact(Domain 3)

Key areas for improvement include Domains 4, and 6. The intervention would benefit from increasing opportunities to share learning with community partners. See the following slides for specific tips to strengthen this domain.

Note: Domains are weighted to give slight weight to domains 2, 3, and 4

Domain	Definition	How did intervention X address this domain?
1. Getting Rooted	How did the intervention assess the intervention's relationship to Blue Shield's overall health equity approach?	3
2. Using Data	What data did the intervention team use to inform design and implementation and did the intervention collect data that would enable measurement of impact on health equity?	2.8
3. Reducing Inequities: Process	How did the intervention aim to reduce inequities?	3
4. Reducing Inequities: Impact	What was the intervention's impact on different subgroups?	1.5
5. Integrating Diverse Perspectives: Engagement	How did the intervention incorporate insights from those with lived experiences related to inequities?	2
6. Integrating Diverse Perspectives: Dissemination	How were findings shared and with whom?	1

### Heat Map Color Key:



# Breaking down the content of the dashboard

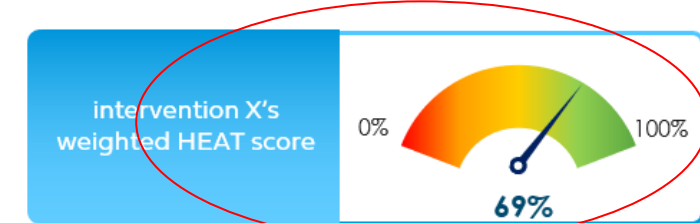
- Context of the intervention and the phase of development
- Responses to Likert-scale questions comprise the domain scores
- Average all domain scores
- Weight average scores to create an overall score
- Interpret the score – percent distribution and qualitative assessment
- Develop feedback content for communication

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<b>HEAT Quantitative Score :</b>	<b>69%</b>
<b>HEAT Qualitative Assessment:</b>	<b>Integrated</b>



**Interpreting intervention X's HEAT Score**

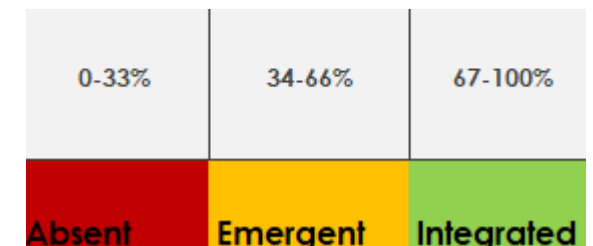
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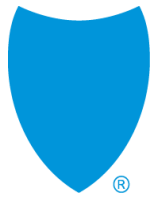
# Considerations for application

- At any stage of an intervention, the Health Equity Assessment Tool is framed as a **collaborative learning tool** to advance health equity principles and assess progress towards those principles
  - Avoid framing as a test that interventions must “pass”
- Organizations/researchers looking to develop their own health equity measurement tools should consider:

1. Applicability of domains and elements of the Health Equity Assessment Tool
2. The intended audience for sharing results
3. Integrating perspectives from partners & community members
4. Accountability for results/information gleaned from the tool

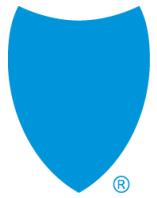






Questions?

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Thank you

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# Contact

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## Disclosures

The authors are all employees of Blue Shield of California.

There are no other financial disclosures to report.

**HEAT** represents Health Equity Assessment Tool in this deck.





Blue Shield of California is an independent member of the Blue Shield Association