AMGA™

Advancing High Performance Health

Health Equity Playbook *Preview*

At AMGA, we are committed to providing our members with tools to assist in addressing *health equity and the social drivers of health (SDOH)*. Our Health Equity Playbook (in development) will provide a framework and foundation for improving diversity, equity, and inclusion (DE&I) in your organization and health equity in the communities you serve. This preview focuses on developing the infrastructure within your organization in order to successfully implement DE&I and health equity initiatives.

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While there are many definitions of health equity, AMGA aligns with Robert Wood Johnson Foundation's, which states that "health equity means that everyone has a fair and just opportunity to be as healthy as possible. This requires removing obstacles to health such as poverty, discrimination, and their consequences, including powerlessness and lack of access to good jobs with fair pay, quality education and housing, safe environments, and healthcare." Health disparities can result in variations in life expectancy, quality of life, disease prevalence, and access to healthcare. Addressing SDOH can help address health disparities. According to the Centers for Medicare and Medicaid Services (CMS), some SDOH are:

1. Food insecurity
2. Lack of interpersonal safety
3. Housing insecurity
4. Transportation insecurity
5. Limited access to utilities

One of the cornerstones of building an infrastructure to support health equity efforts is focusing on DE&I within your organization so your providers and staff reflect the communities you serve.

AMGA's Health Equity Mission

At AMGA, our health equity mission is to serve as the indispensable resource for AMGA member organizations to access health equity tools and resources, foster peer-to-peer engagement, and create the infrastructure to address health equity within their workforce, patient populations, and the communities they serve.

We invite you to join us in our mission to achieve health equity for all.

Would you like to be notified when the full Health Equity Playbook is released in 2025?
Email **HealthEquity@amga.org**

Contents

About the Playbook: This section will provide you with an introduction to health equity and how to navigate the playbook.

Previews – Implementing the Health Equity Spheres of Action: AMGA's framework includes six Spheres of Action. For each Sphere of Action, you will find actions to take in order to implement that specific sphere. You will also find snapshots that provide a high-level overview of the strategies within that sphere.

A comprehensive array of practical, actionable, and readily adaptable strategies is available to offer guidance on the implementation and approach to seek support from your leadership. These strategies are provided through the forthcoming Health Equity Resource Guide, with further details to be announced.

Additionally, a multitude of tools and resources are at your disposal to facilitate the operationalization of these exemplary practices. It is important to note that this Playbook Preview is a dynamic document that will undergo periodic updates. We trust that you will find it invaluable as you strategize and execute health equity initiatives and establish the necessary infrastructure.
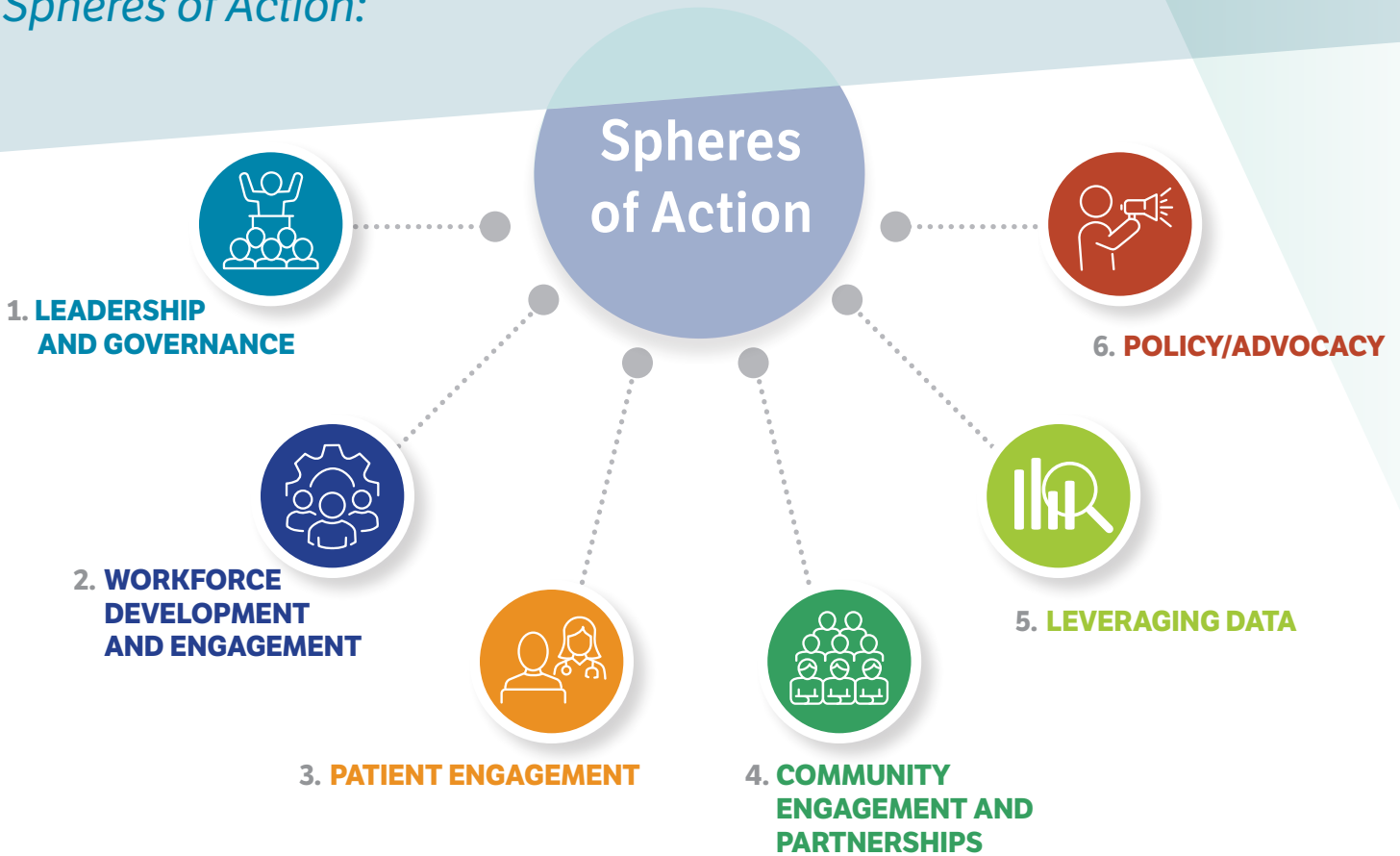
Glossary of Terms: Key definitions and terms related to health equity.

About the Playbook

The Health Equity Playbook Preview has been developed to ensure that AMGA's member organizations possess the essential resources and expertise to execute health equity initiatives that address the SDOH. Regardless of the progress your organization has made in achieving equitable health, this Playbook is customized to cater to your organization's unique requirements and alleviate the strain on health systems by offering evidence-based strategies. In addition to offering practical, sequential tasks, the Playbook incorporates valuable resources to aid in the integration and implementation of health equity within your infrastructure.

The Playbook Preview is organized by six *Spheres of Action:*

Spheres of Action

1. **LEADERSHIP AND GOVERNANCE**
2. **WORKFORCE DEVELOPMENT AND ENGAGEMENT**
3. **PATIENT ENGAGEMENT**
4. **COMMUNITY ENGAGEMENT AND PARTNERSHIPS**
5. **LEVERAGING DATA**
6. **POLICY/ADVOCACY**

The strategies are organized by three *Levels of Action:*

Level 1: Fundamental

The core elements to begin a health equity initiative or building a health equity infrastructure in the organization.

Level 2: Intermediate

Includes assessments, plan development, and implementation of strategies beyond fundamental elements.

Level 3: Advanced

Measuring the effectiveness of implemented strategies and making changes based on outcomes. Includes the spread of health equity initiatives throughout the system and communities.

Spheres of Action

LEADERSHIP AND GOVERNANCE

SNAPSHOT

Level 1: Fundamental

Establish DE&I and health equity readiness

Incorporate DE&I/health equity priority into the organizational strategic plan to demonstrate commitment

Identify a DE&I and/or health equity lead in the organization

Level 2: Intermediate

Develop plan for health system leadership representation (internal)

Identify metrics of success and effectiveness of organizational change

Level 3: Advanced

Develop plan for health system leadership representation (external)

Measure success and effectiveness of organizational changes

Create or enhance organization culture to reflect change and growth
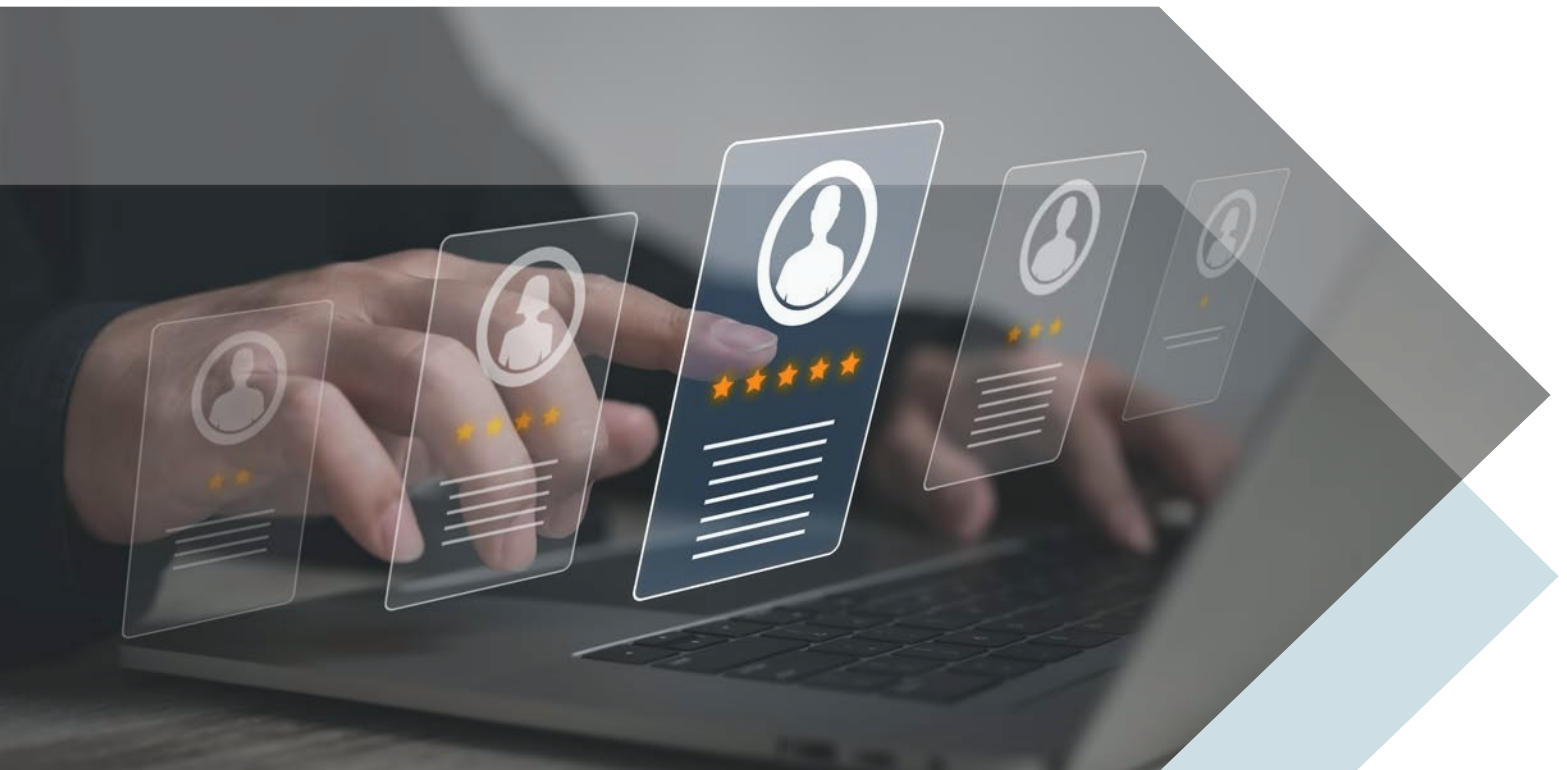
LEADERSHIP AND GOVERNANCE

Level 1: Fundamental

Establish DE&I and Health Equity Readiness

- Complete an organizational readiness assessment to understand your organization's current health equity and DE&I efforts. Include Human Resources to inform hiring practices. Assess understanding of local community data (e.g., social vulnerability index).

Resources

- Cultural and Linguistic Competence Policy Assessment
- HRET HIIN Health Equity Organizational Assessment
- Organizational Self-Assessment for Achieving Health Equity
- Enhancing Equity through Population Health - UC Davis Health

Tip: Assessment should inform if the organization understands health disparities, equity, and SDOH and their impact on health.

Incorporate DE&I/Health Equity Priority into the Organizational Strategic Plan to Demonstrate Commitment

- Develop a business case, purpose statement, financial commitment, and plan for organizational culture and operational changes.

Resources

- Improving Workplace Culture Through Evidence-Based Diversity, Equity and Inclusion Practices
- US Health Care Can't Afford Health Inequities

Identify a DE&I and or Health Equity Lead in the Organization

- Establish a new position, committee, taskforce, or council. Designate someone who has authority to make decisions and is at the executive level.
- Provide designee with resources to implement and assess efforts.

Tip: This action could also be considered an intermediate action depending to how the prior actions were accomplished.

LEADERSHIP AND GOVERNANCE

Level 2: Intermediate

Develop Plan for Health System Leadership Representation (internal)

- Increase leadership diversity through the development of leadership pipelines for staff.
- Assess new hire process to ensure diversity.
- Identify other areas of interest for staff (e.g., ask if they want to sit on a committee or task force and get them exposed to leadership roles).

Resources

- US SDOH Playbook
- DEI (Diversity, Equity & Inclusion) Checklist
- 7 Steps to Create a Leadership Development Plan

Tip: It might be helpful to educate managers and leaders on the importance of staff's interest, especially for hourly employees.

Identify Metrics of Success and Effectiveness of Organizational Change

- Define measures of success and effectiveness.
- Ensure the data are available and accessible.
- Discuss with key stakeholders the best way to visualize the information across departments.

LEADERSHIP AND GOVERNANCE

Level 3: Advanced

Develop Plan for Health System Leadership Representation (external)

- Diversify community representation (senior/executive teams, boards, participating in community boards, committees, etc.).
- Create a DE&I Committee within your Talent Acquisition Team.
- Create a numeric goal as part of your organization's strategic map, accountability, and representation.

Tip: Don't exclude small to midsize organizations, as they are often the most accessible to community members.

Measure Success and Effectiveness of Organizational Changes

- Use a health equity dashboard to track progress.

Create or Enhance Organization Culture to Reflect Change and Growth

- Strategies to come in the full Playbook.

WORKFORCE DEVELOPMENT AND ENGAGEMENT

SNAPSHOT

Level 1: Fundamental

Design and establish education and training curricula for providers and staff

Develop an effective internal communication plan for the new strategy and initiatives

Create internal culture and a sense of inclusion and belonging through activities and initiatives

Design training curriculum for new hires and new learners

Assess how to engage the workforce free from bias

Assess the current state or baseline awareness of the workforce capacity for qualified and culturally competent staff

Level 2: Intermediate

Develop plan to address microaggressions and bias from providers, staff, and patients

Design training curriculum for residents

Develop recruitment plan for hiring providers and staff who represent the community served

Level 3: Advanced

Assess full benefit packages and recruitment, retention, and employee exit strategies

Develop mentorship, promotion, and career development pathways

Create internal culture and sense of inclusion and belonging through activities and initiatives

WORKFORCE DEVELOPMENT AND ENGAGEMENT

Level 1: Fundamental

Design and Establish Education and Training Curricula for Providers and Staff

Some training may occur in the fundamental stage and more advanced topics in intermediate stage:

- Racism and bias (unconscious and implicit)
- Microaggressions
- Cultural competency, cultural humility, cultural mindfulness, awareness
- Building/establishing trust with patients and families
- Communication between providers and patients
- Annual competencies
- Communication between employees

Resources

- Project Implicit: Implicit Association Test (IAT)
- Increasing Empathy
- Diversity, Equity, Inclusion, and Anti-Racism in Continuing Education
- Health Equity Training Modules

Tip:

- Your DE&I/health equity assessment should inform and guide which training topics to begin with and in what order.
- Consider training times/lengths in order not to overwhelm staff.
- Get creative! Consider using terminology other than "training" to engage staff, such as "curriculum," "skills building," or "workshops."
- Tap into existing pathways of education.

Develop an Effective Internal Communication Plan for the New Strategy and Initiatives

- Address any pitfalls in communication. Make sure there is alignment with the vision and mission of the organization.

Resources

- Learning Together: Communicating to Propel Organizational Capacity for Action on Health Equity
- Tools for Communicating about Diversity, Equity and Inclusion

WORKFORCE DEVELOPMENT AND ENGAGEMENT

Tip: This should be done at all levels: staff, care team, patients, and caregivers. This will in turn create accountability to implementation of strategies.

Create Internal Culture and Sense of Inclusion and Belonging Through Activities and Initiatives

- Step 1: Consider organization's yearly activities that recognize all cultures. Develop and disseminate simple communication celebrating cultural observances, etc.
- Step 2: Plan and develop employee resource groups (ERGs).

Tip: ERGs can be effective only if they are provided the appropriate resources that are sustainable.

Design Training Curriculum for New Hires and New Learners

- Embed curriculum into new employees' orientation.

Resources
- Health Equity and Social Justice
- Centers for Public Health Practice Trainings
- Collaborative Screening

Assess How to Engage the Workforce Free from Bias

- Consider including all staff in different resource or support groups instead of only including or asking providers and staff who identify as members of marginalized groups to participate in activities/programs that would support those groups.
- Create a safe space for allies to become engaged.

Assess the Current State or Baseline Awareness of the Workforce Capacity for Qualified and Culturally Competent Staff

- Evaluate where the workforce is in this journey first to inform development of processes.
- Conduct an employee survey.

Resources
- Healthcare Employee Engagement Survey Template

WORKFORCE DEVELOPMENT AND ENGAGEMENT

Level 2: Intermediate

Develop Plan to Address Microaggressions and Bias from Providers, Staff, and Patients

- Providers:
  - Assess for bias.
  - Assess for appropriate and timely treatment and care.
  - Assess and evaluate medical/procedural outcomes.
  - Assess macroaggressions patients might experience via patient satisfaction survey results.

- Staff:
  - Assess for bias.
  - Provide education to recognize and manage bias (e.g., employee orientation).
  - Assess patient satisfaction survey results.

- Patients:
  - Assess for bias.
  - Include experiences of discrimination in the patient satisfaction questionnaire.

Resources

- Take Action, Stand Up Toolkit
- Module 4: Implicit Bias & Microaggressions
- Test Yourself for Hidden Bias
- Harvard Implicit Bias Test

Tip: A few tips to ensure accountability:
  - Set clear metrics.
  - Understand anticipated short-term and long-term outcomes.
  - Ensure policies and procedures align to the metrics.
  - Hold all stakeholders accountable to ensure equity is included in policy and adhered to.
  - Align performance measures and incentives to metrics.
  - Regularly evaluate progress.

Reflective Questions:
  - Do your employees understand SDOH and their impact on health?
  - Do your employees know where their patients live and are experiencing challenges or insecurities?
  - Do your employees experience similar challenges and insecurities? If so, how are you supporting them?

WORKFORCE DEVELOPMENT AND ENGAGEMENT

Design Training Curriculum for Residents

- Address the use of data to improve systems of care, reduce healthcare disparities, and improve patient health. Include basic understanding of the cultures and lived experience of patients served (e.g., explore Social Vulnerability Index Maps).
- Include cultural competency/humility training.
- Develop policy to support provider experiencing patient racial and prejudice attitudes.

Develop a Recruitment Plan for Hiring Providers and Staff Who Represent the Community Served

- Recruit new hires who represent and may have shared lived experience with the communities served.
- Leverage community health workers, social workers, etc. if available.
- Review employee data to evaluate needs.

Resources

- Diversity Recruitment Toolkit
- A Toolkit for Recruiting and Hiring a More Diverse Workforce

WORKFORCE DEVELOPMENT AND ENGAGEMENT

Level 3: Advanced

Assess Full Benefit Packages and Recruitment, Retention, and Employee Exit Strategies

- Create a succession plan for managers and above to ensure continuation of established programs.
- Recruit new hires who represent employees.
- Establish metrics and evaluation for hiring.
- Establish implicit bias training and incorporate it into your onboarding process.
- Establish retention approach.

Resources

- Confronting the Health Equity Gap: Building Your HR Action Plan
- Bright Futures: Health Equity Resources for Health Care Professionals
- How to Improve Your Medical Onboarding & Training Process
- DEI (Diversity, Equity & Inclusion) Checklist

Develop Mentorship, Promotion, and Career Development Pathways

- Consider different pathways for clinical employees and nonclinical employees.
- Particularly for Black, indigenous, and other people of color (BIPOC), and LGBTQIA+ and other marginalized employees, include affinity groups to provide a safe space to support each other and inform the broader strategy by sharing their lived experiences.
- Build key performance indicators to ensure diverse internal candidates are moved upward in the organization.

Resources

- Start a Diversity and Inclusion Mentorship Program: A Guide

Tip: Ensure there is a bidirectional exchange with leadership and create opportunities for hourly employees to participate.

Create Internal Culture and Sense of Inclusion and Belonging Through Activities and Initiatives

- Strategies to come in the full Playbook.

SNAPSHOT

Level 1: Fundamental	Level 2: Intermediate	Level 3: Advanced
Assist staff to prepare for collection of data	Assess sensitivity around staff who are experiencing some form of negative SDOH Develop patient awareness and education about chronic disease management within context of SDOH	Address SDOH issues (facilitate access to care)

PATIENT ENGAGEMENT

Disparities are different than SDOH, so assess sensitivity around staff who are experiencing similar disparities and SDOH.

Level 1: Fundamental

Assist Staff to Prepare for Collection of Data

- Provide training and education on collecting appropriate patient and community data.
- Provide training on best practices when collecting patient data.
- Create resources for staff to share about the "why" behind questionnaires.

Level 2: Intermediate

Assess Sensitivity Around Staff Who Are Experiencing Some Form of Negative SDOH

- How do you support staff who are experiencing negative forms of SDOH to avoid re-traumatization?
- Create a strategic approach to avoid re-traumatization while screening for SDOH.
- Train staff on trauma-informed care.

Develop Patient Awareness and Education about Chronic Disease Management Within Context of SDOH

- Develop culturally and language appropriate educational tools and resources.

Level 3: Advanced

Address SDOH Issues (Facilitate Access to Care)

- Assess coverage (i.e., insurance).
- Expand services (availability of recommended screening and prevention services, transportation, housing, social support, etc.).
- Evaluate timeliness (e.g., capacity to provide care quickly).

Tip: This would likely include additional staff to support (e.g., community health workers).

COMMUNITY ENGAGEMENT AND PARTNERSHIPS

SNAPSHOT

Level 1: Fundamental

Assess and establish needs of community

Level 2: Intermediate

Develop a community partner engagement strategy

Communicate effectively the health equity strategy, programs, resources, and community resources/partnerships to patients, families, and communities

Level 3: Advanced

Develop community agreements

Identify ways to develop mentorship and/or career development opportunities among community members

Hire local and diverse communities and businesses

COMMUNITY ENGAGEMENT AND PARTNERSHIPS

Level 1: Fundamental

Assess and Establish Needs of Community

- Complete a Community Health Needs Assessment (CHNA) or other assessment to understand community needs.

Tip: Your organization may not have to complete a needs assessment if you have access to a hospital that is required to complete an assessment OR you can leverage your county health departments.

Level 2: Intermediate

Develop a Community Partner Engagement Strategy

- Identified prioritized social needs to engage partners.
- Utilize communication tools to learn how to engage and establish relationships.
- Start with small community engagement, such as food banks.

Resources

- Community Engagement Toolkit
- Building Effective Health System-Community Partnerships: Lessons from the Field
- Community Engagement Partners
- Community Engagement Guide
- Community Engagement Toolkits

Communicate Effectively the Health Equity Strategy, Programs, Resources, and Community Resources/Partnerships to Patients, Families, and Communities

- Leverage patient campaigns similar to REaL Data Collection Campaign – "We ask because we care."

COMMUNITY ENGAGEMENT AND PARTNERSHIPS

Level 3: Advanced

Develop Community Agreements

- Understand how to develop agreements.

- Embed staff on board of directors of community-based organizations.

- Develop plan to sustain engagement and relationships.

- Explore larger agreements (universities, etc.).

Resources

- What to Include in Your Partnering Agreement

- SAMPLE Community Partners Memorandum of Understanding Agreement

- Collaboration Toolkit: Creating an MOU

Identify Ways to Develop Mentorship and/or Career Development Opportunities Among Community Members

- Work with local high schools and colleges, along with other local programs.

- Develop a strategy that includes the importance to inventory pipeline programs.

Resources

- Strategies for Health-Care Workforce Development

- Developing an Effective Health Care Workforce Planning Model

Hire Local and Diverse Communities and Businesses

- Hire/partner with local and diverse businesses to work with, such as vendors, suppliers, and procurement companies. Establish metrics and evaluation for hiring.

LEVERAGING DATA

SNAPSHOT

Level 1: Fundamental

Assess organization's current data collection capabilities and identify areas for improvement

Level 2: Intermediate

Develop tools within EHR to screen patients and collect SDOH data

Level 3: Advanced

Assist staff to prepare for collection of data

More strategies coming in the full playbook.

LEVERAGING DATA

Level 1: Fundamental

Assess Organization's Current Data Collection Capabilities and Identify Areas for Improvement

- Assess what tools are available in the electronic health record (EHR).
- Begin educating staff on how to utilize tools within the EHR.
- Assess current data and what is needed to ensure you are capturing the data required for the SDOH reporting requirements.

Level 2: Intermediate

Develop Tools Within EHR to Screen Patients and Collect SDOH Data

- Develop a process by which to collect the information and provide resources.

Tip: Consider how it is being collected in the acute space. You want to avoid re-traumatizing patients by asking for the same data repeatedly.

Level 3: Advanced

Assist Staff to Prepare for Collection of Data

- Provide training and education of staff on the appropriate way of collecting patient and community data.
- Develop script for staff to collect data when engaging with patients.
- Track trends of SDOH among patients to gauge areas of need.*

* *This will assist with ensuring you have the proper information to form appropriate community partnerships that will best serve your patients.*

LEVERAGING DATA

The chart below provides further tips and strategies regarding the 2024 SDOH Reporting Requirements and can be utilized during each level of action.

Steps for Planning to Report SDOH Quality Performance Measures

Level 1: Fundamental

Collect quality performance measures on your patient population stratified by race, ethnicity, disability, socioeconomic status, ZIP code, insurance level, and other SDOH

Level 2: Intermediate

Report on quality performance measures

Level 3: Advanced

Use quality data to guide implementation and monitoring of patient care

POLICY/ADVOCACY

SNAPSHOT

Level 1: Fundamental	Level 2: Intermediate	Level 3: Advanced
Understand local, state, and federal efforts and policies to address health inequities and DE&I (e.g., Medicare and Medicaid), and identify and leverage local, state, and national advocacy organizations	*More strategies coming in the full playbook.*	

POLICY/ADVOCACY

Level 1: Fundamental

Understand Local, State, and Federal Efforts and Policies to Address Health Inequities and DE&I (e.g., Medicare and Medicaid), and Identify and Leverage Local, State, and National Advocacy Organizations

- Reimbursement for Community Health Workers to provide services to address social needs.

Glossary of Terms

Advocacy: Health advocacy encompasses direct service to the individual or family as well as activities that promote health and access to healthcare in communities and the larger public.

Community Collaboration: The process by which citizens, agencies, organizations, and businesses make formal, sustained commitments to work together to accomplish a shared vision.

Culture: Culture in healthcare is defined as integrated patterns of human behavior that include the language, thoughts, communications, actions, customs, beliefs, values, and institutions of racial, ethnic, religious, or social groups.

Governance: Governance in health systems is a systematic approach to maintaining and improving the quality of patient care and holding the system accountable.

Health Disparities: Preventable differences in the burden of disease, injury, and violence, or opportunities to achieve optimal health that are experienced by socially disadvantaged populations.

Health Equity: Health equity is the state in which everyone has a fair and just opportunity to attain their highest level of health.

Health Inequities: Differences in health status or in the distribution of health resources among different population groups, arising from the social conditions in which people are born, grow, live, work, and age.

Leveraging Data: Provides information on how to think about, collect, and analyze local data related to health equity. It provides a starting point for understanding how to document health inequities and utilize it to make informed decisions regarding what health inequities to focus on.

Patient Engagement: Defined as the desire and capability to actively choose to participate in care in a way uniquely appropriate to the individual, in cooperation with a healthcare provider or institution, for the purposes of maximizing outcomes or improving experiences of care.

Social Drivers of Health (SDOH): The World Health Organization describes social drivers of health as the physical, environmental, and socioeconomic factors—such as access to healthcare, higher education, social support systems, housing, and transportation—that affect people's overall quality of life.

Workforce Development and Engagement: Refers to how the health workforce has a central role in addressing (or maintaining) health disparities.

Source: Oxford English Dictionary. "Oxford English Dictionary." OED.com, Oxford University Press, 2023, oed.com.

Other Health Equity Resources

Looking for resources that address SDOH affecting your patient population and/or resources to help you implement the Spheres of Action? Please visit the AMGA Health Equity Focus Area **here**.