

Equity Audit Checklist

Overview

This Equity Audit Checklist guides health-care organizations through five evidence-based steps for embedding racial equity and community perspectives into program design, policy, and operations. Each section includes actionable tasks, clear ownership, and measurable outcomes to help you identify disparities, co-create solutions with affected communities, and drive continuous improvement.

A. Map Your Stakeholders (Also Known as Interest Holders)

- ☐ Build a community stakeholder list (names, affiliations, lived-experience profiles)
- ☐ Identify 8–15 representatives from Black, Indigenous, and other underrepresented communities
- ☐ Reach out with a clear invitation explaining why you want their input and how you'll compensate them
- ☐ Form a small Community Advisory Group to guide your work

B. Collect and Review Your Data

- ☐ Gather your existing outcome reports (e.g., patient/client satisfaction, wait times, service use)
- ☐ Sort that data by race, income level, and other social factors (if available; if unavailable, this may be indicative that the data should be collected)
- ☐ Note any missing information you need to collect (race/ethnicity, language, income); assess capture rates
- ☐ Identify data gaps; plan collection of missing variables via your electronic medical record (EMR) or intake questionnaires

C. Co-Design Workshops

- ☐ Draft a 3-hour agenda using participatory tools (i.e., empathy maps)
- ☐ Recruit equity-trained facilitator; share pre-work materials
- ☐ Co-create SMART goals, workflows, and success measures and document outputs in a shared workbook
- ☐ Validate solutions via a follow-up feedback survey within one week

D. Embed Accountability & Governance

- ☐ Create an Equity Scorecard with 3–5 key performance indicators (for example, client satisfaction by racial groups, service usage by racial group, etc.), targets, and establish milestones (quarterly most preferred)
- ☐ Name a person responsible for each measure (Equity Lead, Data Analyst, Community Liaison) with clear role descriptions
- ☐ Schedule monthly or quarterly check-ins
- ☐ Integrate scorecards into executive performance reviews and leadership dashboards

E. Get Feedback and Improve

- ☐ Meet with your Community Advisory Group every three months
- ☐ Ask what's working, what's not, and what needs changing
- ☐ Update your plan based on their feedback and repeat the cycle
- ☐ Share a simple progress update with all staff and community partners to keep everyone informed and accountable

References: **Public Health Agency of Canada.** (2020). *Social determinants and inequities in health for Black Canadians: A Snapshot*. Ottawa, ON. **Statistics Canada.** (2023). *Mortality inequalities of Black adults in Canada. Health Reports*, 34(2). **Canadian Institute for Health Information.** (2022). *Health Equity Data Tool*. Ottawa, ON. **World Health Organization.** (2019). *Health Equity Audit Toolkit*. Geneva, CH. **Ontario Health.** (2021). *Equity-Focused Quality Improvement Framework*. Toronto, ON.