

Building a Foundation for Health Equity: How to Plan and Implement Priority Actions from the HEC Health Equity Framework

September 2026



Contents

About Healthcare Excellence Canada	3
Acknowledgements	4
About this resource	5
How to use this resource	5
Step 1: Select an action area from the HEC Health Equity Framework	6
Step 2: Build shared purpose	9
Step 3: Role clarity and ways of working	10
Step 4: Embed evaluation from the start to understand the impact you want to have	12
Step 5: Start making your plan	15
Step 6: Take care on the journey	17
Resources to support learning	19

About Healthcare Excellence Canada

Healthcare Excellence Canada (HEC) works with partners across the country to shape a future where everyone in Canada has safe and high-quality healthcare. We bring together people, evidence and action to move Care Forward - spreading and scaling quality and safety improvements, strengthening capacity and collective leadership and catalyzing change in policy and practice.

At HEC, healthcare excellence means improving safety, quality and value for everyone. It means care grounded in what matters most to patients, caregivers, communities and people in the workforce. It also means care that respects and responds to First Nations, Inuit and Métis priorities and is culturally safe, equitable and supported by the appropriate use of technology. Together with our partners, we embed these foundations across the health system.

Our work also focuses on expanding access to safe, connected, high-quality care closer to home and community. This includes supporting people with primary health care needs and older adults with health and social needs.

HEC is an independent, not-for-profit charity funded primarily by Health Canada. The views expressed herein do not necessarily represent the views of Health Canada.

150 Kent Street, Suite 200
Ottawa, Ontario, K1P 0E4, Canada
1-866-421-6933 info@hec-esc.ca

[LinkedIn](#) [Bluesky](#) [Instagram](#) [Facebook](#)

Healthcare Excellence Canada honours the traditional territories upon which our staff and partners live, work and play. We recognize that the stewardship of the original inhabitants of these territories provides for the standard of living that we enjoy today. [Learn more](#)



Acknowledgements

This resource was co-developed with the insight, experience and generosity of many people. We are grateful to the team members, collaborators, patient and community partners and leaders across health and social systems who contributed their time, wisdom and lived expertise.

The ideas and approaches reflected here do not exist in isolation. They are rooted in and shaped by decades of scholarship, activism and lived experience from

equity-focused practitioners, community organizers, researchers and Knowledge Keepers (past and present) whose work has long been naming and challenging the systems that create inequities in health and care. We are grateful to stand on that foundation and commit to continuing to learn from it.

A full list of contributors involved in the development of these resources is available on [HEC's website](#).



About this resource

Implementation is not a one-size-fits-all process. This tool is designed to help you and your team tailor implementation to community priorities, your organizational context and the resources available. Whether you are starting new work or strengthening existing efforts, this tool can help you choose areas for action, build shared purpose and role clarity and begin developing an action plan.

This resource is part of a series of implementation guides that support application of the co-developed [HEC Health Equity Framework](#) to advance equity across health systems and services.

How to use this resource

- Start by reviewing the [HEC Health Equity Framework](#) resource and its eight action areas.
- Work through the steps in this document in sequence with your team members or collaborators. Keep in mind that each step will take time.
- Explore the companion implementation resources contained within each step that can take you deeper into specific areas of the work.



Step 1: Select an action area from the HEC Health Equity Framework

Advancing health equity involves reflecting on your current context and identifying the areas of work that are most needed or offer the greatest potential for impact. Health equity is as much about how we think and relate to one another as it is about what we do. Shifting mindsets and ways of working is therefore just as important as the project itself.

You may be working with an existing project where some key decisions have already been made or starting a new one where there are more opportunities to embed equity principles from the beginning. While you may begin by focusing on a single action from the Health Equity Framework, consider how several actions might work together to create broader change.

As a starting point, you may want to review the [descriptive overview of each action in the framework](#), which includes a short description and ideas on how to move the action into practice.

When considering which action(s) to start with, ask yourself the following questions:

A. Which actions are a priority for the people and communities that you serve and/or provide care for? How do you know?

These questions help centre your health equity work around the experiences and perspectives of the people and communities you are focusing on. When exploring these questions, use the prompts below to reflect and make notes:

- What do you know about the priorities of the people and communities you work with, for example, ask what matters to them? Whose voices are missing?
- How is your team or organization listening to people and communities and gathering evidence about their priority needs and concerns?
- What additional steps can you take to ensure community experiences and perspectives shape the health equity actions you prioritize?

There are many ways for teams to ensure that community experiences and perspectives guide their choice of health equity initiatives. For example:

1. Jointly develop short- and long-term health equity goals with community-based partner organizations and representatives.
2. Recruit members of impacted communities to co-lead strategic initiatives or committees.
3. Review existing reports, websites and other sources of information that capture insights from community meetings on health equity needs and opportunities.

B. Which actions in the framework are most promising for your organization or network?

This question can help you identify where your organization or network is best positioned to adopt or strengthen a health equity-focused initiative. The question can also spark reflection on which action might be the best next step toward achieving your goals.

When you explore this question, use the prompts below to reflect and make notes:

- Is there an existing project or initiative that could benefit from further actions of the HEC Health Equity Framework? For example, your organization could already be collecting patient experience data that could align with – and benefit from – the action “Collect and use equity-focused data.”
- Wherever there is alignment, discuss whether this is a focus area where you, your organization or your network can effect change, and what resources are needed to support learning and practical application of the action area.

Now, bring your reflections together.

After working through these questions individually or as a group, take time to share your work together to identify and agree on one or more priority action areas to focus on. Use the space below to record your decisions. You do not need to address everything at once. Identify a key priority and build from there.

Identified action area(s):

What are the action areas you/your team are focusing on?

Why these actions?

Want to go deeper? Once you have selected one or more actions, consider reviewing the Guiding Commitments implementation resource. This resource is an important guide for how individuals, teams and organizations approach health equity work.



Step 2: Build shared purpose

Health equity work is as much about *how* we work as it is about *what* we do. The relationships we bring to this work, with each other, with communities and with the broader system shape what becomes possible. Everyone will come to this work with different experiences, perspectives and levels of familiarity with health equity, and that diversity is a strength to draw on rather than a gap to manage.

A shared purpose statement is a few sentences that your team writes together. It describes why this work matters to you and what you are committed to doing. Having a written statement helps keep everyone on the same page and gives you something to come back to.

Start by taking time to **reflect individually on your understanding of health equity and how it has shown up in your work and/or life experiences**. Then come together with your team and collaborators to share those reflections and co-create a shared purpose statement.

You may find these prompts useful for both individual and shared reflection:

- What has been your individual or team's experience with health equity work in the past? What have you learned from these experiences?
- Where else is health equity work happening in your organization that you can draw on and learn from?
- Why is the particular action area you selected important to you as an individual? Why is it important to you as a team?
- What are the values and ambitions that you have in common and how will you align them behind the changes you want to see?

Based on your discussion, write a few sentences together that describe **your shared purpose statement**.

Our shared purpose statement:

Write a few sentences that describe who this work is in service of, why it matters and what your team is committed to. Use plain language that everyone, including community and patient partners, can connect with.

Step 3: Role clarity and ways of working

It is helpful to ensure role clarity and establish some foundational agreements for how you will work together. Here are some prompts for this conversation:

- What is each team member's role in the project? What are the roles of patient and community partners?
- What is important to you and each team member to ensure good working relationships?
- How will your team's ways of working make space for different voices, perspectives and the experiences of everyone (across different roles, communities and so on) to shape the initiative?

- How will your team make decisions as the work progresses? How will your team communicate these decisions with all partners?
- What does accountability mean to you?

As an outcome of this conversation, write down a few key agreements about how your team will work together. For example, how you'll make decisions, how you will listen to different voices will be heard and how you will share responsibilities.

Our ways of working:

Write a few sentences that describe how you will work together.

This is just the start of defining how you will work together.

Want to go deeper? Once you have a sense of your roles, these implementation resources can help you and your team reflect on where you have the greatest opportunity to influence and act:

1. Using Your Influence to Support Change

This resource helps you identify where you have influence within your role, relationships and organization to take meaningful action toward advancing health equity.



2. How Your Team Can Make Change

This resource supports teams to explore their strengths, barriers and opportunities to determine where they are best positioned to take collective action on health equity.



3. How to Build an Accountability Agreement

This resource guides your team in building trust, clarifying commitments and planning an accountability agreement that centres the priorities and leadership of the communities you work with.



Step 4: Embed evaluation from the start to understand the impact you want to have

A health equity approach asks not just whether things are improving overall, but whether gaps between groups are narrowing, who is benefiting and who may still be left out. This approach starts with engaging the people and communities directly affected by the work and exploring why it matters and how we would collectively define success. The work of shaping evaluation questions, defining what meaningful outcomes look like and interpreting findings should be done together.

Building evaluation into your initiative from the start helps you understand if and how you achieve your goals, identify lessons learned and capture the impact of your work. As you plan for evaluation, consider different kinds of approaches to honour multiple ways of knowing.

Consider combining quantitative data with qualitative and community-led approaches such as storytelling, interviews and participatory methods that centre lived experience.

For example, rather than tracking only how many people access a service (quantitative data), you might also ask who is not accessing services and why. This inquiry could be approached by gathering stories (qualitative data) from community members, alongside quantitative data, or working with the people your initiative serves to define what meaningful change looks and feels like to them.

It may be helpful to refer to other evaluation frameworks, such as the [Improving Equity in Access to Palliative Care Collaborative Evaluation Framework](#), or you can create a specific program evaluation guide.

These questions can help guide your evaluation planning:

1. **Who is most affected by this initiative and how will you involve them in defining what success looks like?**

2. What will tell you whether things are improving – and whether they are improving equitably?

3. What mix of approaches will you use to gather evidence and who will be involved in analyzing and interpreting the findings?

Based on your responses above, what are some of the actions you could take to start building an evaluation approach for your initiative? Write down a few ideas first, then pick one to start with.

Some actions we could take:

The one we will start with:

Step 5: Start making your plan

The work of putting a plan together requires dedicated effort and time, including time to revisit and adjust as you go. There is no single right way to develop a plan, so you will need to choose a path that works best for your team or network.

The suggestions below will help guide your planning to implement the selected actions in the HEC Health Equity Framework.

- Determine the scope, purpose and timeline of your initiative, including leadership and key partners, for example patient partners, community organizations, First Nations, Inuit and Métis governments. This stage of planning will help to support the work and the distribution of roles and responsibilities.
- Set the goals and corresponding activities for implementing the chosen action area of the HEC Health Equity Framework, along with available resources or gaps you need to address.
- Develop a plan for setting the agenda, making decisions and communicating with key partners, including the mechanisms you will use to share updates and progress.
- As activities related to the implementation of an action area are introduced, identify what tools or processes you will use to gather feedback. Build in time to reflect on how your project is unfolding and make iterative changes as needed.
- As the work progresses, consider how you can embed learnings and activities more broadly across your setting.

After working through the considerations above, you may want to record your plan using a table like the one below or use another project planning tool.

Table 1: Simple project planning tool

Action	Key Activities/ How?	Who is responsible?	Timeline
<i>Example (for reference): Identify resources and relationships needed to support the work</i>	Map partners and identify required tools and resources	Project lead, with all team members contributing	Planning phase (before the work begins)
<i>Example (for reference): Keep partners informed and engaged as the work grows</i>	Develop a partner engagement plan with regular updates, opportunities for input and two-way communication	Project lead, with support from team members and community partners	Throughout implementation (ongoing)
<i>Example (for reference): Establish a feedback/ learning cycle to continuously improve and strengthen the work</i>	Schedule regular reflection points (e.g. after each milestone). Gather input from all partners and use findings to adapt plans	Everyone involved in the work, including community partners	Mid-implementation and onward (re-visit every 3–6 months)

Step 6: Take care on the journey

Things will not always be comfortable or go smoothly when you engage in health equity work. This is especially true as you begin to understand your own place in systems of power and privilege. That is okay. It's part of the process.

Draw on what you are learning and find new ways to move forward. Patience, understanding, compassion, including for yourself, and a desire for justice will help pave the way. It also helps to find people who can support you along the way.

Come back to these questions as often as you need to. Each time you work through this reflection activity record the date so you can see how your thinking shifts.

1. What is energizing you in this work right now?

2. Where are you feeling stretched, uncertain or challenged?

3. What support do you need – from your team, your organization or elsewhere?

Want to go deeper? Another area to explore is your learning journey.

How to learn and unlearn from the journey:

This resource explores how the process of the equity journey matters as much as the outcomes. Learning and re-learning is essential to equity work.



Resources to support learning



[Active Implementation Research Network's Active Implementation Frameworks](#). The approaches described in these frameworks break down each step of implementation in detail, enabling you to plan your project with precision.



[HEC's Long Term Success Tool](#). This self-assessment tool helps teams explore whether they have the resources needed to ensure their quality improvement efforts are successful and sustainable long term. It can also be used to assess a team's or organization's readiness to engage in a specific initiative arising from the HEC Health Equity Framework.



[The Tamarack Institute's program evaluation guide](#). This guide can help you plan an evaluation that makes sense for your organization or team.