**Getting Started with the Healthcare Equality Index Worksheet**

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| **Laying the Groundwork** | |
| **Key Questions to Ask** | **Response** |
| What is your “Why”? Why is this work important to your healthcare facility? What would “success” look like to you? |  |
| Who are your champions? Who are the **key stakeholders** that will support this work? |  |
| Do you have leadership buy-in and support? An executive sponsor? |  |
| Does the LGBTQ+ community have an affirming and welcoming healthcare facility within 25 miles of your facility’s location? |  |
| Do you know what the local LGBTQ+ healthcare needs and priorities are? |  |
| What resources or supports would enable you to succeed? What do you perceive to be the biggest obstacle to doing this work? |  |
| **Logistical Considerations** | |
| **Key Questions to Ask** | **Response** |
| Are there any **teams/committees that already exist** that you can leverage for logistical completion of this project? Do you currently have an LGBTQ+ group/structure/focus for your patients or employees that can assist in completing the survey? |  |
| If no existing structure works, consider creating a new cross-departmental committee to focus on this effort. At a minimum, you should at least identify a point person/representative for the following HEI topic areas: | * Policy Update Questions: * Patient Care: * Quality Care/Compliance: * Electronic Health Record Questions: * Human Resources/Benefits: * Staff Training:      * Community Outreach: |
| Does a budget for this work exist (both monetary and staff time)?  Consider budget for marketing/updated patient documents/records and also staff bandwidth to complete HEI survey and/or receive training in LGBTQ+ patient centered care. |  |

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| **Getting Started** | |
| **Key Steps/Questions** | **Notes** |
| Review your foundational policies (Criteria 1) for LGBTQ+ inclusion/inclusive language. Do they meet the HEI criteria? |  |
| Familiarize yourself with the LGBTQ+ Community Needs   * Are there local LGBTQ+ organizations that you can partner with to better understand the needs of the community? * Are LGBTQ+ demographics collected in Community Needs Assessments? |  |
| Take a look at your facility through a pair of LGBTQ+ shaded glasses. Put yourself in the perspective of an LGBTQ+ patient and an LGBTQ+ employee and ask yourself:   * Do you see yourself reflected in the facility’s policies, intake forms, marketing materials, employee policies, etc.? * Do you think it is safe for an LGBTQ+ patient/staffer to share their LGBTQ+ status at your facility? * What can be changed or implemented to see yourself reflected? |  |
| Use the HEI criteria as a self-evaluation check-list.   * What are the areas for growth?   + Which are easiest to take on and can be implemented fairly quickly?   + What will take more time, planning, and resources? |  |

**Key Dates**

* **HEI 2024 Criteria (and Training Information) finalized:** June 2022
* **Survey Open Season:** Mid to Late 2023
* **Survey Review:** Late 2023
* **HEI 2024 Report Release:** March 2024