

EQUITY, DIVERSITY AND INCLUSION IN LTC: ASSESSMENT AND PLANNING TOOL (EDI-LTC)

Acknowledgments

This tool was adapted from the *Diversity, Equity and Inclusion Organizational Self-Assessment Tool* (2015) developed by the Regional Diversity Roundtable of Peel and the *Strengthening Diversity in Your Organization: A Self-Assessment Tool* (2014) developed by the Regional Municipality of York. We acknowledge the tremendous amount of work that went into the development of those two tools.

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Thank you to the users of this tool for their ongoing effort to make LTC homes inclusive and equitable.

Introduction

This *Equity, Diversity and Inclusion in Long-Term Care: Assessment and Planning Tool (EDI-LTC)* is designed to help long-term care (LTC) homes better meet the needs of the diverse community that lives, works and visits at the care home. Every LTC home will be at a different point along their journey towards inclusion. Sometimes, despite the desire to embrace inclusion and equity in our homes, it can be hard to find the time or resources to develop plans that are realistic and effective. This tool can help identify areas for improvement, guide the development of quality improvement plans and inform organizational strategic planning to incorporate **equity, diversity and inclusion**.

Readers are encouraged to spend time becoming familiar with the definitions of the words **equity, diversity** and **inclusion** in the Terms to Get You Started section.

Completing this assessment will help you identify what your LTC home is doing well and how you can improve your **equity, diversity and inclusion** practices in the following seven areas:

1. Planning and policy
2. Organizational culture
3. Education and training
4. Human resources
5. Community capacity building
6. Resident and family engagement
7. Service provision

Who Should Complete the Tool

This tool is a discussion guide that can help deepen your team’s understanding of equity, diversity and inclusion and kick-start action planning. Complete the tool as a team and/or discuss your results and next steps in a group setting. **Diversity** is valuable so try to include a range of people in discussions:

- leadership;
- direct care team members (e.g., nurses, personal support workers);
- residents;
- family members;
- representatives from all departments and areas in the home (including recreation, spiritual care, allied health, environmental services and food services); and
- volunteers.

To complete the tool as a group, you will need to create a safe space where everyone can share their honest feedback and can contribute to the discussion in some way. Depending on your organizational culture, you may need to create smaller groups, use a terms of reference for your group(s) and/or allow people to complete the assessment anonymously before discussing as a group.

The tool provides a list of specific promising practices with space to document evidence that your home is doing the promising practice or has yet to start. There is a place to score your current level of action. An example is provided below.

Example

Impact Area 3: Employee Education and Training

No Action Taken 1	Partial Action Taken 3	Full Action Taken 5	Not Applicable N/A
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Promising Practice	Evidence of Practice Within the Home	Score
Our LTC home requires team members from all levels (e.g., Board of Directors, senior leadership, direct care team members and volunteers) of the organization to participate in training and education related to equity, diversity and inclusion .	<p><i>Our home offers online diversity training to employees through our learning management system.</i></p> <p><i>Our organization monitors and reviews how many employees have participated in diversity training.</i></p>	3



Based on your scores, the tool generates a total score for each impact area. Since not all homes offer the same services in the same way, some practices may not be possible. If a practice is not possible you can mark it as not applicable and exclude it from your score.

An action plan template is provided, with questions for consideration, **SMART** goal setting for specific actions and questions to help identify barriers and facilitators. The sections of this toolkit are modeled on the seven impact areas of this assessment tool and provide promising practices and stories from Ontario LTC homes for inspiration.



This tool can be completed within this toolkit, or downloaded from our website to be filled out electronically at clri-ltc.ca/embracingdiversity

References

- Charter of Peel. (2015). Achieving the Vision of an Inclusive Peel Region: A Diversity, Equity, and Inclusion Organizational Self-Assessment Tool. [PDF file]. Retrieved from <http://www.dicharter.rdrpeel.org/wp-content/uploads/2016/02/DEI-Organizational-SAT-Jan-8-Booklet-Final-Copy.pdf>
- Yrenergy, B. & Paradies, Y. (2012). Organizational assessment: An overlooked approach to managing diversity and addressing racism in the workplace. *Journal of Diversity Management* 7(4), 11-26.
- York Region. (2014). Strengthening Diversity in Your Organization: A Self-Assessment Tool. [PDF file]. Retrieved from <http://www.yorkwelcome.ca/wps/wcm/connect/immigration/b4fd0295-4f20-4941-8a6e-e1c-c76d30a2e/SelfAssessmentTool.pdf?MOD=AJPERES>

IMPACT AREA 1: PLANNING AND POLICY

Goal: Our LTC home formally recognizes **equity, diversity and inclusion** as a priority, incorporating these principles into planning and policies.

No Action Taken 1	Partial Action Taken 3	Full Action Taken 5	Not Applicable N/A
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Promising Practice	Evidence of Practice Within the Home	Score
1.1 Our home's mission, vision, values, and strategic plan commit us to practicing equity, diversity and inclusion.		
1.2 Our home has policies and procedures in place that promote equity, diversity and inclusion (e.g., non-discrimination policy, complaint procedures).		
1.3 Our home involves team members, residents, family members, and others who reflect cultural diversity in decision-making processes when developing policies and procedures.		
1.4 Our home has an action plan to address equity, diversity and inclusion, and reviews the plan on an annual basis.		
1.5 Our home has a Diversity and Inclusion Committee with membership that reflects the diversity of the home.		
1.6 Equity, diversity and inclusion is a standing agenda item for existing committees (e.g., Joint Health and Safety Committee, Resident Council, Family Council).		
1.7 Our home allocates financial resources (e.g., dedicated staff time) for equity, diversity and inclusion work.		
1.8 Our home regularly evaluates our equity, diversity and inclusion practices (at minimum annually).		
1.9 Our home collects and uses resident demographic data to plan services and activities.		
1.10 Our home uses and/or gathers evidence to identify needs, opportunities and gaps in services related to equity, diversity and inclusion (e.g., Vital Signs report, regional research reports).		

IMPACT AREA 2: ORGANIZATIONAL CULTURE

Goal: Our LTC home shows a strong commitment to **equity, diversity and inclusion** by taking steps to ensure the organizational culture and environment are welcoming, affirming and inclusive.

No Action Taken 1	Partial Action Taken 3	Full Action Taken 5	Not Applicable N/A
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Promising Practice	Evidence of Practice Within the Home	Score
2.1 Leadership team members actively promote equity, diversity and inclusion.		
2.2 Our home regularly seeks feedback from employees regarding their experiences of inclusion (e.g., exit interviews, annual reviews and employee satisfaction surveys include questions about equity, diversity and inclusion).		
2.3 A formal process is in place for employees to raise concerns or complaints about equity, diversity and inclusion.		
2.4 There is a structured approach for responding to employees' concerns or complaints regarding equity, diversity and inclusion (e.g., mediation process, Ombudsperson).		
2.5 Our home's environment is inclusive, welcoming and affirming for diverse groups (e.g., gender neutral washrooms available; décor, posters and signage reflect the diverse employee and resident population).		
2.6 Our key communication materials (i.e., brochures, signage, Resident and Family Handbook) are accessible to and inclusive of diverse groups (e.g., written in plain language, translated into different languages, gender-inclusive language, and include images representing diversity).		
2.7 Our home's website is accessible to, and inclusive of, diverse groups (e.g., accessibility functions, images representing diversity).		
2.8 Our home recognizes and honours diverse cultures throughout the year (e.g., dietary requirements, holidays and celebrations, awareness days, prayer accommodations).		
2.9 Our home has a process for addressing and resolving intercultural conflict among residents and team members and to reduce discrimination.		

IMPACT AREA 3: EMPLOYEE EDUCATION AND TRAINING

Goal: Our LTC home recognizes the value of ongoing **equity, diversity and inclusion** training and education. The home provides employees with learning opportunities to develop knowledge and skills to work effectively with a diverse population.

No Action Taken 1	Partial Action Taken 3	Full Action Taken 5	Not Applicable N/A
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Promising Practice	Evidence of Practice Within the Home	Score
3.1 Our home reviews the diversity of its local community and considers potential demographic changes in an effort to be proactive in education and training.		
3.2 Our home requires team members from all levels of the organization to participate in training and education related to equity, diversity and inclusion. (e.g., Board of Directors, senior leadership, direct care team members, and volunteers)		
3.3 Our home offers ongoing training on equity, diversity and inclusion topics (e.g., in-services, e-modules, lunch and learns) to all team members and volunteers in a way that accommodates different learning styles.		
3.4 Education provided involves individuals with lived experience in the development and delivery of the session(s).		
3.5 Training and education is framed with a cultural humility approach (e.g., opportunity for participants to engage in personal reflection and bring awareness to unconscious biases; recognition that the resident is the expert in their own life).		
3.6 Team members are supported in enhancing their language, technological and/or literacy skills in order to facilitate their professional development.		
3.7 Our home supports employee participation in professional development opportunities related to equity, diversity and inclusion (e.g., financial support and time off work to participate in external training, conferences and workshops).		
3.8 Our home conducts evaluations on the effectiveness of its equity, diversity and inclusion training (e.g., assessment of learning and adopting practices).		

ORGANIZATIONAL & PERSONAL REFLECTION

IMPACT AREA 4: HUMAN RESOURCES

Goal: Our LTC home is committed to recruiting, hiring and retaining team members who are representative of the diverse local population and/or have knowledge and skills in supporting **equity, diversity and inclusion**, through its Human Resource (HR) policies and practices.

No Action Taken 1	Partial Action Taken 3	Full Action Taken 5	Not Applicable N/A
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Promising Practice	Evidence of Practice Within the Home	Score
4.1 Our home actively reaches out to diverse communities when advertising for new or vacant positions (e.g., various ethnic groups, LGBTQI2S+ community, faith-based gathering places, etc).		
4.2 Our home’s job postings, job descriptions and HR forms use gender-inclusive language.		
4.3 Our home’s hiring and promotion practices consider potential candidates’ equity, diversity and inclusion experience and expertise (e.g., interview questions include scenarios about diversity).		
4.4 The orientation of all new employees and volunteers includes equity, diversity and inclusion (e.g., providing person-centred care to the LGBTQI2S+ community).		
4.5 Our home’s performance evaluation includes equity, diversity and inclusion indicators for team members at all levels of the organization (e.g., professional development on diversity topics, adherence to policies).		
4.6 Our home collects and reviews demographic information about all team members (submitted voluntarily by the employee) that are hired, promoted or receive disciplinary action to monitor and assess whether equitable Human Resource practices are employed.		
4.7 Our home has accommodation policies and practices to support team members’ individual needs (e.g., ergonomic accommodations, Employee Assistance Program, flexible hours, options for tele-commuting).		
4.8 Our home effectively communicates accommodation options available to team members and ensures they are readily available.		

IMPACT AREA 5: COMMUNITY CAPACTIY BUILDING

Goal: Our LTC home is committed to enabling community change by developing partnerships and networks to advance **equity, diversity and inclusion** work.

No Action Taken 1	Partial Action Taken 3	Full Action Taken 5	Not Applicable N/A
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Promising Practice	Evidence of Practice Within the Home	Score
5.1 Our home develops meaningful partnerships with community-based organizations and community groups to advance equity, diversity and inclusion within the home and enhance life for residents from various communities (e.g., local faith based organizations, LGBTQI2S+ community organizations, etc.).		
5.2 Our home collaborates with other organizations to develop and deliver culturally responsive services (e.g., participation in advisory committees, networks, coalitions and task forces focused on enhancing equity, diversity and inclusion within the LTC sector).		
5.3 Our home shares its equity, diversity and inclusion promising practices and resources with the broader community of the LTC sector (e.g., through presentations, education/training, community of practice, sharing on association message boards, sector publications, and/or social media).		

ORGANIZATIONAL & PERSONAL REFLECTION

IMPACT AREA 6: RESIDENT AND FAMILY ENGAGEMENT

Goal: Our LTC home actively engages residents and their family members and/or friends in the planning, development and evaluation of its services.

No Action Taken 1	Partial Action Taken 3	Full Action Taken 5	Not Applicable N/A
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Promising Practice	Evidence of Practice Within the Home	Score
6.1 Our home engages residents and family members in development, review and evaluation of equity, diversity and inclusion related statements, documents and initiatives (e.g., Resident Council, Family Council, resident and family representatives on Diversity Committee).		
6.2 Our home provides training to team members on how to effectively engage residents and their families in service planning, development and evaluation (e.g., training on engagement with individuals with lived experience and unique considerations required).		
6.3 Our home evaluates the effectiveness of its engagement processes (e.g., measures resident and family involvement, assesses resident and family satisfaction with engagement process).		
6.4 Residents and their family are notified that the Resident Bill of Rights is available in a number of different languages and are provided with a copy in their language of choice.		
6.5 Our home regularly seeks feedback from residents and their family regarding their experiences of inclusion (e.g., resident and family satisfaction surveys include questions about equity, diversity and inclusion).		
6.6 Our home maintains a list of team members who speak different languages and are willing to act as interpreters to support linguistic needs of residents and their family, as a backup if translation services are not available		
6.7 Our home offers communication supports and adaptations for residents and families (e.g., translation services, supports for hearing, visual, cognitive and speech impairments).		
6.8 Our home has resources about diversity and inclusion readily available for residents and families.		
6.9 Our home offers education for residents and their families (e.g., through resident neighbourhood meetings, Resident Council, Family Council, newsletters, etc.).		

IMPACT AREA 7: LTC SERVICE PROVISION

Goal: Our LTC home is committed to delivering inclusive and equitable care and services to residents.

No Action Taken 1	Partial Action Taken 3	Full Action Taken 5	Not Applicable N/A
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Promising Practice	Evidence of Practice Within the Home	Score
7.1 Our home uses an assessment tool to collect residents' social history that includes individual cultural, social, spiritual, and socio-economic information.		
7.2 Our home's assessment tools use inclusive language and questions (e.g., asks about a person's 'partner', 'spouse', rather than 'husband', 'wife')		
7.3 Our home provides education to team members on how to provide care that is respectful of residents' unique values, beliefs and personal identity.		
7.4 Resident care plans are person-centred, incorporating the residents' individual cultural, social, spiritual, and religious needs, practices, customs and beliefs.		
7.5 Our home has a formal process to identify and address equity, diversity and inclusion related concerns or complaints from residents and/or substitute decision makers.		
7.6 Our home evaluates services to ensure service delivery is inclusive and equitable (e.g., review indicators of social engagement and compare demographics of participants versus non-participants in recreation programs).		
7.7 Our home shares evaluation findings with residents and their substitute decision makers (e.g., through newsletters, website and communication boards).		
7.8 Meal planning and service is inclusive of cultural dietary regulations and preferences.		
7.9 Our home offers a wide variety of programs for residents that honour and reflect their diversity (e.g., travelogues, cultural fashion shows, music, cultural celebrations, etc.).		

OVERALL ORGANIZATIONAL ASSESSMENT AND ACTION PLANNING

Complete the score card below to help identify your home’s existing strengths and opportunities for improvement related to **equity, diversity and inclusion**.

Interpretation of the Average Assessment Score

Substantial work is needed	Moderate work is needed	Some work is needed	Minimal work is needed	Our LTC home embodies diversity and inclusion practices
1	2	3	4	5

IMPACT AREAS	AVERAGE ASSESSMENT SCORE (TOTAL SCORE ÷ # OF APPLICABLE PRACTICES* = _/5)
1 – Planning & Policy	$\frac{\underline{\hspace{2cm}}}{\textit{Total Score}} \div \frac{\underline{\hspace{2cm}}}{\textit{\# of Practices}} = \frac{\underline{\hspace{2cm}}}{\textit{Answer}} / 5$
2 – Organizational Culture	$\frac{\underline{\hspace{2cm}}}{\textit{Total Score}} \div \frac{\underline{\hspace{2cm}}}{\textit{\# of Practices}} = \frac{\underline{\hspace{2cm}}}{\textit{Answer}} / 5$
3 – Education & Training	$\frac{\underline{\hspace{2cm}}}{\textit{Total Score}} \div \frac{\underline{\hspace{2cm}}}{\textit{\# of Practices}} = \frac{\underline{\hspace{2cm}}}{\textit{Answer}} / 5$
4 – Human Resources	$\frac{\underline{\hspace{2cm}}}{\textit{Total Score}} \div \frac{\underline{\hspace{2cm}}}{\textit{\# of Practices}} = \frac{\underline{\hspace{2cm}}}{\textit{Answer}} / 5$
5 – Community Capacity Building	$\frac{\underline{\hspace{2cm}}}{\textit{Total Score}} \div \frac{\underline{\hspace{2cm}}}{\textit{\# of Practices}} = \frac{\underline{\hspace{2cm}}}{\textit{Answer}} / 5$
6 – Resident & Family Engagement	$\frac{\underline{\hspace{2cm}}}{\textit{Total Score}} \div \frac{\underline{\hspace{2cm}}}{\textit{\# of Practices}} = \frac{\underline{\hspace{2cm}}}{\textit{Answer}} / 5$
7 – Service Provision	$\frac{\underline{\hspace{2cm}}}{\textit{Total Score}} \div \frac{\underline{\hspace{2cm}}}{\textit{\# of Practices}} = \frac{\underline{\hspace{2cm}}}{\textit{Answer}} / 5$

* Exclude any promising practices you have marked as ‘Not Applicable’ from the calculation of the Average Assessment Score.

Based on the assessment, identify two impact areas where your organization is **strong** with respect to **equity, diversity and inclusion**.

1. _____

2. _____

Based on the assessment, identify two impact areas where your organization **requires improvement** with regards to **equity, diversity and inclusion**.

1. _____

2. _____

CREATE AN ACTION PLAN

Based on the assessment results, identify three practices that your home would like to improve. These may be existing strengths that you want to leverage or opportunities where you can address a need. They may all fall within one impact area, or they may span multiple impact areas.

It is important to ensure that you are creating **SMART** goals when selecting and planning your actions.

S	Specific	You are targeting a specific action/area for improvement
M	Measurable	You are able to measure/track its progress and/or completion
A	Assignable	You can assign it to a specific person or group of people to complete
R	Realistic	You should be able to do it with the available/allocated resources
T	Time-bound	You can assign a reasonable timeline for when results can be achieved

Practices To Be Improved

1. _____

2. _____

3. _____

ACTION PLAN FOR **PROMISING PRACTICE #1**

<p>SPECIFIC – What specific promising practice do you want to work on?</p> <p>Specify the action you will need to take and how you anticipate the action will advance equity, diversity and inclusion in your LTC home.</p>	
<p>MEASUREABLE – How will you be able to measure/track progress and/or completion?</p> <p>Specify what will happen that will let you know you are making progress and/or have achieved your goal.</p>	
<p>ASSIGNABLE – Who will lead the development and implementation of this action?</p> <p>Specify who will lead/co-lead and specify any additional persons who will be available as resources to support the work. Keep in mind the importance of collaboration.</p>	
<p>REALISTIC – What resources will be available to complete the action and will they be enough?</p> <p>Specify how many resources (team member time, amount of additional funding, etc.) are needed and available for the action.</p>	
<p>TIME-BOUND – When will the action need to be completed and is there enough time?</p> <p>Specify the time needed to complete the activity and/or key milestones and the timeline for completion. Include deadline dates.</p>	
<p>Which stakeholders will need to be involved to make this action happen? How will they be recruited and engaged throughout the process?</p>	
<p>What potential barriers or challenges do you anticipate?</p>	

ACTION PLAN FOR PROMISING PRACTICE #2

<p>SPECIFIC – What specific promising practice do you want to work on?</p> <p>Specify the action you will need to take and how you anticipate the action will advance equity, diversity and inclusion in your LTC home.</p>	
<p>MEASUREABLE – How will you be able to measure/track progress and/or completion?</p> <p>Specify what will happen that will let you know you are making progress and/or have achieved your goal.</p>	
<p>ASSIGNABLE – Who will lead the development and implementation of this action?</p> <p>Specify who will lead/co-lead and specify any additional persons who will be available as resources to support the work. Keep in mind the importance of collaboration.</p>	
<p>REALISTIC – What resources will be available to complete the action and will they be enough?</p> <p>Specify how many resources (team member time, amount of additional funding, etc.) are needed and available for the action.</p>	
<p>TIME-BOUND – When will the action need to be completed and is there enough time?</p> <p>Specify the time needed to complete the activity and/or key milestones and the timeline for completion. Include deadline dates.</p>	
<p>Which stakeholders will need to be involved to make this action happen? How will they be recruited and engaged throughout the process?</p>	
<p>What potential barriers or challenges do you anticipate?</p>	

ACTION PLAN FOR PROMISING PRACTICE #3

<p>SPECIFIC – What specific promising practice do you want to work on?</p> <p>Specify the action you will need to take and how you anticipate the action will advance equity, diversity and inclusion in your LTC home.</p>	
<p>MEASUREABLE – How will you be able to measure/track progress and/or completion?</p> <p>Specify what will happen that will let you know you are making progress and/or have achieved your goal.</p>	
<p>ASSIGNABLE – Who will lead the development and implementation of this action?</p> <p>Specify who will lead/co-lead and specify any additional persons who will be available as resources to support the work. Keep in mind the importance of collaboration.</p>	
<p>REALISTIC – What resources will be available to complete the action and will they be enough?</p> <p>Specify how many resources (team member time, amount of additional funding, etc.) are needed and available for the action.</p>	
<p>TIME-BOUND – When will the action need to be completed and is there enough time?</p> <p>Specify the time needed to complete the activity and/or key milestones and the timeline for completion. Include deadline dates.</p>	
<p>Which stakeholders will need to be involved to make this action happen? How will they be recruited and engaged throughout the process?</p>	
<p>What potential barriers or challenges do you anticipate?</p>	