Workshop Facilitation Guide – Health Equity Assessment Tool (HEAT)

- This guide sets out the steps to take before, during and after undertaking a HEAT workshop.
- It has been written to help you deliver workshops online using MS Teams and the online white board Miro, but you can adapt it for use with other platforms or for an in-person workshop.
- When and how to use this guide: This guide is intended to help you plan your workshop *after* you have familiarised yourself with the HEAT template and agreed the scope of your workshop.

1. Before your workshop

1. Agree the scope/topic you want to focus on. Reviewing these case studies of how HEAT has been used by others will help you do this.

2. To do this, consider:
   - What are the main aims of your work?
   - How do you expect your work to reduce health inequalities?
   - What are the key sources of data, indicators, and evidence that allow you to identify health inequalities in the service/project/programme you are focussing on?

3. Form your workshop team and agree roles. Your team should include:
   - **A lead facilitator (LF):** To welcome participants, introduce the workshop & set the scene and explain next steps
   - **A presenter (P):** to share with participants the data and evidence you have collected that is relevant to your workshop topic/focus
   - **Breakout group facilitators (BF):** to support participants to take part in discussion, ensure everyone's voice is heard and help record participant's input if needed (e.g. if participants aren't able to use Miro)
   - **A supporter (S):** To assign people to breakout groups, time-keep, help deal with any technical issues for participants, record whole group discussions (if using MS Teams) and take back-up notes

4. Depending on the size of your team and how many participants you have you might want your lead facilitator and presenter to also act as breakout group facilitators.

5. Always make sure you have one person dedicated to the supporter role who is not involved in presenting or facilitating so that they can concentrate on time keeping etc

6. Be clear on what your next steps will be after the workshop and who will be responsible for:
   - Writing up the workshop outputs
   - Feeding back to workshop participants
   - Producing an action plan or other means of responding to the workshop outputs

7. Agree who you need to invite to take part in your workshop and issue invitations

8. Agree how you will capture the discussion that take place during the workshop. If you're using Miro take a look at our example workshop board for some ideas.

2. During the workshop

Timings (example)	Focus	HEAT template section	Detail	Lead	Notes
10.00	Welcome			LF	
10.05	Scope of session		• Introduce HEAT and explain your objectives for the workshop • Define the scope/topic of the workshop and its aims	LF	

10.15	*Prepare & Assess*: Data and evidence on the workshop topic focus	A1, A2 & B3	Share content of A2 data and evidence
			Share what's known about the distribution of health (B3):
			    • Socio-economic and geography
			    • Protected characteristics and
			    • Inclusion health groups
				P	• HEAT & the training resources that accompany it here provide guidance on how to identify and review relevant data.

10.35	**Breakout session one:** The aim of this session is to share & explore participants perspectives on what drives or causes health inequalities in your service	B4	• The LF should explain what will happen in the breakout groups • Q1 What do you think are the key drivers for inequality in INSERT YOUR SERVICE/PROJECT/PROGRAMME? • Prompt your participants to consider the data & insights you have shared with them in the previous session AND to use their own knowledge and experience to build on that data.	LF	• Supporter divides participants into MS Teams breakout groups • If you have a small number of participants, you might want to stay in a single group • If you have a larger number of participants divide into group of between 6-8 people. • You might want to direct individual focus groups to

					focus on specific sub-topics e.g. a particular service area or population group
11.15	Comfort break		Close the breakout groups and bring everyone back to main room	S	
11.20	Feedback		Feedback from breakout rooms	LF/BF	
11.30	**Introducing the second breakout session:** The aim of this session is to generate and assess ideas for actions to address the issues identified in session 1 and consider how the impact of these actions could be evaluated.		Q2 – What action can we take to address the drivers of health inequalities identified in Session 1? Q3 – How will we know if we're making a difference?	LF	
11:35			Divide back into breakout groups	S	
11.35	**Breakout session two**	C5 & C6	Answer questions 2 & 3 and agree key points to feedback to the wider group	BF	
12.15	Comfort break				
12.25	Feedback		Feedback from breakout rooms	LF/BF	
12.35	Blind-spots	C7	Are there areas of data/insight or engagement with the community that we need to build on?	P	
12.50	Next steps		• Set out what you will do next and when	LF	
13.00	Thank you and close			LF	

3. After the Workshop

1. Support a member of your workshop team to prioritise writing up the outputs from your workshop and share a summary with your participants.
2. Arrange a short meeting for your workshop team to reflect on the workshop and share thoughts on what went well and what could be improved
3. Develop an action plan for how you will implement the options for addressing health inequalities through your workshop.
4. Part D of the HEAT template will help you review and assess the impact of the actions you've implemented to date