Community Health Worker
Core Consensus (C3) Project:

Moving Toward Consensus on CHW Roles/Scope of Practice and Competencies

Unity Conference
Memphis, Tennessee
July 13, 2015
Presenters:
Carl H. Rush, Sergio Matos, E. Lee Rosenthal
Why C3 now?

- National Community Health Advisor Study (1998) has provided a starting point for creation of CHW education programs, BUT…
- Times have changed – more CHWs working “inside” health care
- More states developing official role definitions and skill requirements
- Pressure to create national standards, but agreement among states is not clear
- More organizations want to know “what’s a good training program?”
- First stage of work: Coastal AHEC collected, analyzed over 40 training program descriptions
Where we begin
At the Core: CHW Attributes

Trustworthy - Dependable, Responsible, Reliable
Shared life experience(s)
Connected to Community
Respectful – Courteous, Honest, Patient
Empathetic - Caring, Compassionate, Kind
Friendly - Outgoing, Sociable
Resourceful – Creative, Inventive, Clever, Enterprising
Mature - Prudent, Persistent, Developed
Open-minded - Non-judgmental, Relativistic
The CHW Core Consensus (C3) Project: An Overview

• Coordinated by UT School of Public Health Institute for Health Policy – Project on CHW Policy and Practice

• Administered by the National Area Health Education Centers Organization (NAO)

• Funded initially by the Amgen Foundation and several in-kind and contract contributions

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C3 Project Aim

Project Aim:
The C3 Project aims to offer CHW and other stakeholder-driven “contemporary” recommendations for consideration and adoption throughout US related to:

- CHW Core Roles (together: Scope of Practice)
- CHW Core Skills
- And affirm existing knowledge about CHW Core Qualities
Project Core Values

Key Value:

- A core value of the Project’s implementing team is promoting CHW *self-determination*.
- Reinforces APHA CHW Sections recent success in passing an APHA resolution asserting 50% of Committee working in CHW–related policy and certification be CHWs
Guidance from a Majority-CHW National Advisory Committees

- **Fall 2014 - Spring 2015**: Roles and Competencies Crosswalk and Review

- A majority CHW Advisory Committee brought a national perspective from CHWs and CHW allies. The Advisors played a central role in refining the proposed list of Roles and Skills and affirming CHW Qualities worked from

- **Summer 2015**: APHA CHW Section Advisors being established for CHW Network Review

Advisors Chaired by C3 CHW Fellows:
Catherine Haywood (LA) and Jacqueline Ortiz Miller (CN)
C3 Project Methods

REVIEW OF CHW:

Roles

Skills

Affirmation of identified:

CHW Qualities
# Nat’l CHA Study (1998) Baseline for C3 Project Crosswalk

<table>
<thead>
<tr>
<th>ROLES</th>
<th>SKILLS</th>
<th>QUALITIES</th>
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<tbody>
<tr>
<td><strong>Reviewed by C3 Project</strong>&lt;br&gt;1) Cultural Mediation&lt;br&gt;2) Health Education&lt;br&gt;3) Assuring Access to Health Care and Other Services&lt;br&gt;4) Informal Counseling and Social Support&lt;br&gt;5) Individual and Community Advocacy&lt;br&gt;6) Provision of Direct Service&lt;br&gt;7) Individual and Community Capacity Building</td>
<td><strong>Reviewed by C3 Project Ability to /for:</strong>&lt;br&gt;1) Communication&lt;br&gt;2) Interpersonal&lt;br&gt;3) Knowledge Base&lt;br&gt;4) Service Coordination&lt;br&gt;5) Capacity Building&lt;br&gt;6) Advocacy&lt;br&gt;7) Teaching&lt;br&gt;8) Organizational</td>
<td><strong>Endorsed by C3:</strong>&lt;br&gt;• Connected to the community&lt;br&gt;• Strong and courageous&lt;br&gt;• Friendly/outgoing/sociable&lt;br&gt;• Patient&lt;br&gt;• Open-minded/non-judgmental&lt;br&gt;• Motivated and capable of self-directed work&lt;br&gt;• Caring&lt;br&gt;• Empathetic&lt;br&gt;• Committed/dedicated&lt;br&gt;• Respectful&lt;br&gt;• Honest&lt;br&gt;• Open/eager to grow/change/learn&lt;br&gt;• Dependable/responsible/reliable&lt;br&gt;• Compassionate&lt;br&gt;• Flexible/adaptable&lt;br&gt;• Desires to help the community&lt;br&gt;• Persistent&lt;br&gt;• Creative/resourceful</td>
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<thead>
<tr>
<th>STATE</th>
<th>Roles /Scope of Practice (SOP)</th>
<th>Training Standards (Curricula)</th>
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<tbody>
<tr>
<td>California</td>
<td>California Health Workforce Alliance-State Conf./Study</td>
<td>Community Health Works/ City College of San Francisco</td>
</tr>
<tr>
<td>Massachusetts</td>
<td>Official State SOP</td>
<td>Official State Board of Cert. Core Competencies</td>
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<tr>
<td>New York</td>
<td>New York State CHW Initiative</td>
<td>New York State CHW Initiative</td>
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<tr>
<td>Oregon</td>
<td>Scope of Practice Committee, State Traditional Health Worker Commission</td>
<td>Scope of Practice Comm., State Traditional Health Worker Comm. (Comm. Capacitation Center Multnomah County)</td>
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<tr>
<td>Minnesota</td>
<td>MN Community Health Worker Alliance</td>
<td>Official State Curriculum</td>
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<tr>
<td>CHR/IHS</td>
<td>Formal SOP</td>
<td>NA/Revisit –date tbn</td>
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<tr>
<td>Texas</td>
<td>State Definition of CHWs</td>
<td>State Curriculum Standards (Coastal AHEC certified curriculum )</td>
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American Public Health Association Meeting

- WORKSHOP: “Toward Consensus on Recommended Practices in CHW Skill Development and Support of Scope of Practice”
  Feedback session sharing preliminary findings
  C3 Project APHA Pre-Session
  Saturday, November 15, 2014

- Report to the Education & Capacitacion Committee of the CHW Section of APHA
  Report Out to Committee- ongoing
  Wednesday, November 19, 2014

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CHW Network Outreach Calls

Fall 2014: Overview of C3
Spring 2015: Updates and Q & A
Summer 2015: Kick off CHW Network Review

GOALS:

- To share C3 Project with nation’s CHW leadership and acknowledge C3 Project’s goals impact/link to CHW self-determination
- To update CHW Network Leaders on C3 Project plans and to gather early CHW Network feedback on hopes for Project
- To gather CHW Network leaders input on Roles and Skills and as appropriate endorsement of proposed Roles, Skills and Qualities
- To encourage CHW Network linkages

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Proposed Roles and Skills

- The C3 Project crosswalk findings were refined through consultant and advisors input; this resulted in a proposed list of roles and skills for consideration.

The list includes 10 roles and 10 skills:
- some roles and skills have modified language from the baseline and new sub-topics
- some roles and skills have been newly added
CHW Roles proposed for Network Review

10 ROLES FOR CONSIDERATION: (* NEW)

- To be released Fall 2015 following CHW Network Review
Example of a Role: (new, was emerging in 1998)

Participating in Evaluation and Research

- Engaging in evaluating CHW services and programs
- Identifying and engaging research partners, including community consent processes
- Participating in evaluation and research:
  - Identification of priority issues and evaluation/research questions
  - Development of evaluation/research design and methods
  - Data collection and interpretation
  - Sharing results and findings
  - Engaging stakeholders to take action on findings
CHW Skills- (sometimes called Competencies) proposed for Network Review

10 SKILLS FOR CONSIDERATION: (*NEW)

- To be released Fall 2015 following CHW Network Review
Example of a Skill: with main skill and sub-skills

SKILL 1: Communication Skills

- Ability to use language confidently
- Ability to use language in ways that liberate
- Ability to communicate using plain language
- Ability to communicate with empathy
- Ability to listen actively
- Ability to prepare written communication (including electronic)
- Ability to document work
- Ability to use the language of the community served
Many new content areas proposed
(1998 original list in color font):

10. Knowledge Base

- To be released Fall 2015
following CHW Network Review
Affirming Existing Attributes
(also known as Qualities)

NCHAS (1998)
- Connected to the community (a community member or possessing shared experience with community members)

NY (2010)
- Connected to Community
- Community member OR having a close understanding of the community they serve
- Shared life experiences
- Desire to help the community

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C3 Readers Panel

Readers Panel:

- Chaired by: Durrell Fox & Gail Hirsch
- Made up of invited CHWs, Allies, & Other Decision Makers
- Reviewed materials Spring 2015 and made suggestions for report edits to refine written report before release both to CHW Networks and to wider community
Early Release Review & Feedback Exchange Memorandum of Understanding

C3 is working with select states/organizations offering limited early release in exchange for feedback

- Wisconsin: active collaboration—integrating into CHW Apprenticeship Program design
- Illinois: coordination - response to state leg
- Florida: coordination - new state association
- Vermont: coordination
- Washington: local level training integration
- Oregon: state: pending
CHW Network Review Timetable

SUMMER 2015

- **JUNE**: Kick-Off Calls for CHW Networks
  - Kickoff Led by C3 CHW Fellows
  - C3 CHW Review Fellow Joelisa Castillo (WI)
- **JULY**: CHW Network Review Begins
- **AUGUST**: Network Develops Feedback
- **SEPTEMBER**: Network Finalize Feedback

Feedback Due to C3 Project Team by mid-September (tent Sept. 15, 2015)

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C3 Project Report/Findings Release

- Unity Conference presentation
- At 5 pm today
  C3 Project Open Space/Open House
  1-1 Q & A, book signing by S. Matos

UPCOMING:
- APHA Presentation – Session along with CHW Apprenticeship Updates Monday, November 2, 2015
- Journal of Ambulatory Care Management – Methods article accepted for publication 12/15
- Ongoing reports to federal and other CHW workgroups
- Report release to stakeholders, others planned for late 2016

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Questions & Comments

Contact us c/o: info@c3project.org
to be added to our Distribution List
C3 Project Partner Support Made this Possible

The C3 Project from Unity 2014 to Unity 2015 was made possible by:

- UT Project on CHW Policy and Practice
- Mesa Public Health Associates
- Centers for Disease Control
- Amgen Foundation
- National AHEC Organization
- State support from Wisconsin & United Voices
- APHA CHW Section
- C3 Project Contributors – staff team and more
- Today’s Facilitators and Presenters
  - And CHW Network Leaders and CHWs!
C3 Advisory Committee
Fall 2015-Spring 2016: cross walk review

Community Health Workers:

CHW Fellows/Chairs

- Catherine Haywood, Louisiana
- Jacqueline Ortiz-Miller, Connecticut

CHW Members

- Mariela Ardemagni-Tollin, Minnesota
- Leticia Boughton, Illinois
- Sornia Joseph, Florida
- Jessie Perez, Nebraska
- Freddy Zambrano, Washington DC

CHW Allies:

- Kathy Burgoyne, Washington
- Maria Lemus, California
- Susan Mayfield-Johnson, Mississippi
- Katie Mitchell, Michigan
- Sam Sabo, Arizona
- Laurene Sarracino, Laguna Pueblo, NM
C3 Project Team

C3 CHW Fellows:
- Catherine Gray Haywood
- Jacqueline Ortiz Miller
- Joelisa Castillo (CHW Network Review only)

Consultants:
- Noelle Wiggins
- Sergio Matos
- Don Proulx
- J. Nell Brownstein

Readers Panel Chairs
- Durrell Fox
- Gail Hirsch

Staff
- Jessy Uriarte
- Caitlin Allen
- Jorge M. Ibarra
- Carl H. Rush
- E. Lee Rosenthal