CHW Core Consensus (C3) Project: The Journey Toward a United Consensus

UNITY CONFERENCE JULY 20, 2016
ATLANTA GA
Presenters

Durrell Fox CHW, Health Equity Consultant & MA Prevention and Wellness Trust Fund, Massachusetts

Role in C3

Julie St. John, Texas Tech University Health Sciences Center Abilene, TX

Role in C3

Presenting on behalf of C3 team with slides adapted from recent presentations by Lee Rosenthal and Carl Rush who cannot be here today
Project Rationale
Project Aims (Phase 1)

• To offer CHW- and stakeholder-driven contemporary recommendations for consideration and adoption throughout the United States related to:
  ◦ CHW Core Roles (also known as Scope of Practice)
  ◦ CHW Core Skills
  ◦ CHW Core Qualities (affirm existing knowledge)
CHW Self Determination: A Project Core Value

“Support for Community Health Worker Leadership in Determining Standards for Training and Credentialing”

C3 strategies for self-determination:

- Majority CHW Advisory Committee
- CHW Fellows who chair Advisory Committee and Led CHW Network Outreach, Supported Network Review
- CHW Network Review
Methods
Involvement Across the U.S.

- Staff
- Consultants
- CHW Fellows
- Collaborating Organizations
- Readers Panel
- Advisory Committee
- CHW Networks
- Advisory Group
C3 Project timeline

• Precursor activity in 2013: analysis of over 40 training program descriptions by Coastal AHEC (TX)

• Fall 2014 - Spring 2015: Roles and Competencies Crosswalk and Review by Advisory Committee including a majority CHWs (Analysis)

• Summer 2015: CHW Networks Review and consensus building (Stage)

• Spring 2016: release of 2015 report
### Crosswalk Analysis Stage

**Data Gathering and Crosswalk Analysis**
- Benchmark Identification and Selection
- Benchmark Document Collection
- Cross Walk of Benchmark Documents
- Check for Inter-rate Reliability
- Complete First Draft for Public Comment

**Roles and Skills Refinement**
- APHA Meeting Review
- Advisory Committee; Consultant Review
- Implementation Team Review
- Work with Majority CHW Advisory Committee

**Prepare for Report Out**
- Report Writing
- Readers Panel
- Report Back to CHW Network
- Release to Network

### Consensus Building Stage

**Build Field-based Consensus**
- Share
- Review
- Input
- Refinement

**Release to Public for Review and Endorsement**
<table>
<thead>
<tr>
<th>STATE</th>
<th>Roles /Scope of Practice (SoP)</th>
<th>Skills</th>
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<tbody>
<tr>
<td>California</td>
<td>California Health Workforce Alliance</td>
<td>City College of San Francisco CHW Curriculum</td>
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<tr>
<td>Massachusetts</td>
<td>State Board of Certification SoP Definition</td>
<td>State Board of Certification Core Competencies</td>
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<td>New York</td>
<td>New York State CHW Initiative</td>
<td>New York State CHW Initiative</td>
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<td>Oregon</td>
<td>Scope of Practice Committee, State Traditional Health Worker Commission</td>
<td>Scope of Practice Committee, State Traditional Health Worker Commission</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>Indian Health Service CHR Program</td>
<td>National SoP Definition</td>
<td>NA/Revisit –date TBD</td>
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<tr>
<td>Texas</td>
<td>State Definition of CHWs</td>
<td>State Curriculum Standards (Coastal AHEC certified curriculum)</td>
</tr>
</tbody>
</table>
Other resource documents

• National Community Health Advisor Study
• New York State CHW Initiative
• Massachusetts Board of Certification
• California Health Workforce Alliance
• Forthcoming CDC policy study on certification
### Baseline C3 Project Crosswalk

<table>
<thead>
<tr>
<th>Roles</th>
<th>Skills</th>
<th>Qualities</th>
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<tbody>
<tr>
<td>1) Cultural Mediation</td>
<td>Ability to /for 1) Communication 2) Interpersonal 3) Knowledge Base 4) Service Coordination 5) Capacity Building 6) Advocacy 7) Teaching 8) Organizational</td>
<td>• Connected to the community • Strong and courageous • Friendly/outgoing/sociable • Patient • Open-minded/non-judgmental • Motivated and capable of self-directed work • Caring • Empathetic • Committed/dedicated • Respectful • Honest • Open/eager to grow/change/learn • Dependable/responsible/reliable • Compassionate • Flexible/adaptable • Desires to help the community • Persistent • Creative/resourceful</td>
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</table>
Building Consensus
Advisory Committee

- Jacqueline Ortiz Miller, CHW Fellow, Co-Chair
- Catherine Haywood, CHW Fellow, Co-Chair
- Mariela Ardemagni-Tollin
- Leticia Boughton
- J. Nell Brownstein
- Kathy Burgoyne
- Maria Lemus
- Susan Mayfield Johnson
- Katherine Mitchell
- Jessie Perez
- Samantha Sabo
- Lauren Sarrachino
- Sornia Joseph
- Freddy Zambrano
Readers Panel

• Durrell Fox, Reader Panel Co-Chair
• Gail Hirsch, Reader Panel Co-Chair
• Naomi Cottoms
• Lauren Edmundson
• Cam Escoffery
• Lizzie Fussell
• Dawn Heffernan
• Kim Kratz
• Susan Kunz
• Beth Lamarre
• Beverly McCarty
• Betsy Rodriguez
• Janey Skinner
• Julie Smithwick
• Edward Thomas
• Ashley Wennerstrom
Network Review (27 of 50...)

- Maryland Community Health Worker Association
- New Mexico Community Health Worker Association
- Massachusetts Community Health Worker Association
- South Carolina Community Health Worker Association
- Michigan Community Health Worker Association
- Florida CHW Coalition, Inc.
- Community Health Worker Network of NYC
- Georgia Community Health Worker Network
- Arkansas Community Health Worker Association
- Community Health Workers Association of Connecticut
- Arizona Community Health Worker Association
- Chicago CHW Local Network
- Oregon Community Health Worker Association
- Presa Community Center
- Promotores de Salud Community Health Workers of the Northwest Georgia Health Care Partnership
- Community Health Worker Network of Buffalo
- Community Health Worker Initiative of Sonoma County
- Texas Gulf Coast CHWs/Promotores Association
- Minnesota Community Health Worker Alliance
- Wisconsin Community Health Worker Alliance Peer Exchange Network
- Louisiana Community Health Outreach Network
- United Voices Collaborative of Wisconsin
- Northern Texas Community Health Worker Resource Coalition
Advisory Group

- Tatyana Gorodetsky
- Paula Saldana
- Napualani Spock
- June Munoz
- Carol West
- Qadrriyyah McKinnis
- Hosseinali Shadidi
- Scott Smith
- Jack Coffey
- Sherri Ohly

**Advisory Group Representative**
- Katie Mitchell
- Leticia Boughton

**APHA CHW Section Chair/Liaison**
- Mae Gilene Begay

**Texas Networks Liaisons**
- Kim Bush
- Katy Nimmons

**CHW Network Fellow**
- Joelisa Castillo

**CDC Representatives**
- Dan Baden, Betsy Rodriguez
Roles, Skills, and Qualities
Supporting CHWs to Sustain Those They Serve

Roles

Skills

Qualities

Individuals, Families, and Community Served
Qualities

Connection to Community Served
<table>
<thead>
<tr>
<th>Role</th>
<th>Sub-Roles</th>
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| 1 Cultural Mediation among Individuals, Communities, and Health and Social Service Systems | a. Educating individuals and communities about how to use health and social service systems (including understanding how systems operate)  
b. Educating systems about community perspectives and cultural norms (including supporting implementation of culturally and linguistically appropriate services [CLAS] standards)  
c. Building health literacy and cross-cultural communication |
| 2 Providing Culturally Appropriate Health Education and Information | a. Conducting health promotion and disease prevention in a manner that matches linguistic and cultural needs of participants or community  
b. Providing necessary information to understand and prevent diseases and to help people manage health conditions (including chronic disease) |
| 3 Care Coordination, Case Management, and System Navigation          | a. Participating in care coordination and/or case management  
b. Making referrals and providing follow-up  
c. Facilitating transport to services and helping to address other barriers to services  
d. Documenting and tracking individual and population level data  
e. Informing people and systems about community assets and challenges |
| 4 Providing Coaching and Social Support                             | a. Providing individual support and coaching  
b. Motivating and encouraging people to obtain care and other services  
c. Supporting self-management of disease prevention and management of health conditions (including chronic disease)  
d. Planning and/or leading support groups |
| 5 Advocating for Individuals and Communities                        | a. Advocating for the needs and perspectives of communities  
b. Connecting to resources and advocating for basic needs (e.g., food and housing)  
c. Conducting policy advocacy |
| 6 Building Individual and Community Capacity                        | a. Building individual capacity  
b. Building community capacity  
c. Training and building individual capacity with CHW peers and among groups of CHWs |
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<tr>
<th>Role Sub-Roles</th>
<th>7 Providing Direct Service</th>
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<tbody>
<tr>
<td></td>
<td>a. Providing basic screening tests (e.g. heights &amp; weights, blood pressure)</td>
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<td>b. Providing basic services (e.g. first aid, diabetic foot checks)</td>
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<td>c. Meeting basic needs (e.g., direct provision of food and other resources)</td>
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<td>8 Implementing Individual and Community Assessments</td>
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<td>a. Participation in design, implementation, and interpretation of individual-level assessments (e.g. home environmental assessment)</td>
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<td>b. Participation in design, implementation, and interpretation of community-level assessments (e.g. windshield survey of community assets and challenges, community asset mapping)</td>
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<td>9 Conductingetching each</td>
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<td>a. Database recruitment of individuals, families, and community groups to services and systems</td>
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<td>b. Follow-up on health and social service encounters with individuals, families, and community groups</td>
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<td>c. Home visits to provide education, assessment, and social support</td>
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<td>d. Presenting at local agencies and community events</td>
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<td></td>
<td>10 Participating in Evaluation and Research</td>
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<td>a. Engaging in evaluation and services and programs</td>
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<td>b. Identifying and engaging community members as research partners, including community consent processes</td>
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<td>c. Participation in evaluation and research:</td>
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<td></td>
<td>i) Identifying priority issues and evaluation research questions</td>
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<td>ii) Development of evaluation research design and methods</td>
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<td></td>
<td>iii) Data collection and interpretation</td>
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<td>iv) Sharing results and findings</td>
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<td>v) Engaging stakeholders to take action on findings</td>
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<tr>
<td>Skill</td>
<td>Sub-skill</td>
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| 1     | Communications Skills | a. Ability to use language confidently  
b. Ability to use language in ways that engage and motivate  
c. Ability to communicate using plain and clear language  
d. Ability to communicate with empathy  
e. Ability to listen actively  
f. Ability to prepare written communication including electronic communication (e.g., email, telecommunication for the deaf)  
g. Ability to document work  
h. Ability to communicate with the community served (may not be fluent in language of all community served) |
| 2     | Interpersonal and Leadership Skills | a. Ability to provide coaching and social support  
b. Ability to conduct self-management coaching  
c. Ability to use interviewing techniques (e.g., motivational interviewing)  
d. Ability to work as a team member  
e. Ability to manage conflict  
f. Ability to practice professional humility |
| 3     | Service Coordination and Navigation Skills | a. Ability to coordinate care (including identifying and accessing resources and overcoming barriers)  
b. Ability to make appropriate referrals  
c. Ability to facilitate development of an individual and/or group action plan and goal attainment  
d. Ability to coordinate CHW activities with clinical and other community services  
e. Ability to follow-up and track care and referral outcomes |
| 4     | Capacity Building Skills | a. Ability to help others identify goals and develop to their fullest potential  
b. Ability to work in ways that increase individual and community empowerment  
c. Ability to network, build community connections, and build coalitions  
d. Ability to teach self-advocacy skills  
e. Ability to conduct community organizing |
| 5 | Advocacy Skills | a. Ability to contribute to policy development  
b. Ability to advocate for policy change  
c. Ability to speak up for individuals and communities |
|---|----------------|----------------------------------------------------------------|
| 6 | Educational Facilitation Skills | a. Ability to use empowering and learner-centered teaching strategies  
b. Ability to use a range of appropriate and effective educational techniques  
c. Ability to facilitate group discussions and decision-making  
d. Ability to plan and conduct classes and presentations for a variety of groups  
e. Ability to seek out appropriate information and respond to questions about pertinent topics  
f. Ability to find, share, and request information  
g. Ability to collaborate with other educators  
h. Ability to collect and use information from and with community members |
| 7 | Individual and Community Assessment Skills | a. Ability to participate in individual assessment through observation and active inquiry  
b. Ability to participate in community assessment through observation and active inquiry |
| 8 | Outreach Skills | a. Ability to conduct casefini ng, recruitment and follow-up  
b. Ability to prepare and disseminate materials  
c. Ability to build and maintain a current resources inventory |
<table>
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<tr>
<th>Skill</th>
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<tr>
<td>Professional Skills and</td>
<td>a. Ability to set goals and to develop and follow a work plan</td>
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<tr>
<td>Conduct</td>
<td>b. Ability to balance priorities and manage time</td>
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<td>c. Ability to apply critical thinking techniques and problem solving</td>
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<td>d. Ability to use pertinent technology</td>
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<td>e. Ability to pursue continuous lifelong learning opportunities</td>
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<td>f. Ability to maximize personal safety while working in community and/or clinical settings</td>
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<td>g. Ability to observe ethical and legal standards (e.g. CHW Code of Ethics, Americans with Disability,</td>
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<td>h. Ability to identify situations calling for mandatory reporting and carry out mandatory reporting</td>
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<td>i. Ability to participate in professional development of peer CHWs and in networking among CHW groups</td>
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<td>j. Ability to set boundaries and practice self-care</td>
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<tr>
<td>Evaluatio and Research</td>
<td>a. Ability to identify important concerns and conduct evaluation and research to better understand root causes</td>
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<tr>
<td>Skills</td>
<td>b. Ability to apply the evidence-based practices of Community Based Participatory Research (CBPR) and Participatory Action Research (PAR)</td>
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<td>c. Ability to participate in evaluation and research processes including:</td>
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<td>i) Identifying priority issues and evaluation/research questions</td>
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<td>v) Engaging stakeholders to take action on findings</td>
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<tr>
<td>Knowledge Base</td>
<td>a. Knowledge about social determinants of health and related disparities</td>
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<tr>
<td></td>
<td>b. Knowledge about pertinent health issues</td>
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<tr>
<td></td>
<td>c. Knowledge about healthy lifestyles and self-care</td>
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<td>d. Knowledge about mental/behavioral health issues and their connection to physical health</td>
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<td>e. Knowledge about health behavior theories</td>
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<td>f. Knowledge of basic public health principles</td>
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<td>g. Knowledge about the community served</td>
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<td>h. Knowledge about United States health and social service systems</td>
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Next Steps
The future of C3

Mid-2016 – mid-2017:
- Outreach and consensus building with other stakeholder groups (Outreach)
- Analysis of roles and skills in community vs. clinical settings (Settings)
- Recommendations on methods to assess skill proficiency and Core Qualities (Assessment)
C3 Project
Partners and Supporters

Coordinating Organizations
• National AHEC Organization
• Texas AHEC East Coastal Region
• UT Project on CHW Policy and Practice
• Mesa Public Health Associates
• Community Health Resources LLC
• Texas Tech El Paso, Paul L Foster School of Medicine

Collaborators
• APHA CHW Section

Funders/Supporters
• Amgen Foundation
• Sanofi
• Wisconsin Apprenticeship Program/State-CDC
• Texas Tech El Paso

Key Participants
• CHW Networks and CHWs in Practice
C3 Project Team (2016-2017)

- Caitlin Allen
- Nell Brownstein
- Maria Cole
- Durrell Fox
- Gail Hirsch
- Lisa Renee Holderby-Fox
- Lex Hurley
- Jorge Ibarra
- Jacqueline Ortiz-Miller
- Colton Palmer
- Lee Rosenthal
- Carl Rush
- Belinda Sanchez
- Julie St. John
- Readers Panel
- CHW Advisory Committee
- CHW Network Advisory Group
- CHW Networks
PLEASE SHARE CONTACT INFORMATION WITH INFO@C3PROJECT.ORG FOR UPDATES