Section I

Designing an Effective Community Health Worker Program

CENTER FOR COMMUNITY HEALTH ALIGNMENT

Contents

Designing an Effective Community Health Worker Program

The Community Health Worker (CHW) model is a long-standing one that, when implemented with best practices, can improve the lives of individuals and communities. Organizations in many settings can employ CHWs, including health care systems (both small and large), community-based organizations, public health institutions, and social services. Regardless of the organization type, the most successful CHW programs (even those integrated within health care systems), have the largest impact when CHWs have accessibility and interaction with the individuals and communities they serve outside of the organization's doors. CHWs extend the services of their teams and organizations to better reach and serve individuals and communities at-large.

Figure 1: This image, from Brooks et al (2018), is focused on CHWs in health care settings, but nonetheless demonstrates the exciting potential of CHWs to extend the health care team's reach into the patient's environment and share information back to the health care setting.

Despite the title, **health** is only one component of the many roles that Community **Health** Workers serve in. In fact, CHWs are advocates, coaches, educators, and support to individuals and communities facing inequities whether related to health or other unmet needs (i.e., social determinants of health). The not-so-secret ingredients of this recipe for success are the core qualities, skills and roles of CHWs. CHWs are trusted members of the communities they serve because they have a deep understanding of the health and social needs of their communities. CHWs can promote racial, gender, and health equity by effectively reaching people who have not traditionally had access to adequate healthcare and social services, and who are at highest risk for health inequities.

CHW programs are not a "one size fits all." Before getting started it is critical to obtain buy-in from the leadership of your organization early on and to identify champions within the organization. The following questions are key things to consider in the early stages of planning a CHW program.

Questions to consider before starting a new CHW program or intervention?	
Q1. Does the staff and leadership of your organization understand the qualities, roles, and skills of CHWs?	Y / N Not Sure
Q2. Has your organization identified a champion(s) to facilitate planning and implementing a CHW program or intervention?	Y / N Not Sure
Q3. Has your organization determined the "community" from which you will recruit CHWs and draw program participants?	Y / N Not Sure
Q4. Has your organization or team identified which priorities and needs CHWs will address using their competencies?	Y / N Not Sure
Q5. Has your organization developed tools (i.e., timeline, protocols, and funding) to implement a new CHW program or intervention?	Y / N Not Sure

These questions are just a starting point to assist with this work and it is okay to answer, "not sure". After assessing these critical questions, your organization can determine how a CHW program will best fit within the current organizational structure and with the current services being provided related to improving outcomes for individuals and communities. Whether your organization is taking the first steps towards planning a CHW program or even if you have started the process but need some additional support, this toolkit will provide you with strategies, tools, and resources on program planning, implementation, and evaluation. Within this toolkit you will find quick assessments, links to helpful tools, and loads of resources. And, most importantly, it includes the compiled expertise and experience of individuals who are themselves CHWs, have worked alongside CHWs, and/or have supported organizations to successfully implement CHW programs.

Who are CHWs? – Qualities, Skills, and Roles

CHWs are trusted members of the communities they serve. CHWs are known by many different names/titles and is considered an umbrella term. The ***American Public Health Association (APHA)*** defines a CHWs as *a frontline public health worker who is a trusted member of and/or has an unusually close understanding of the community served. This trusting relationship enables the worker to serve as a liaison/link/intermediary between health and social services and the community to facilitate access to services and improve the quality and cultural competence of service delivery. A Community Health Worker also builds individual and community capacity by increasing health knowledge and self-sufficiency through a range of activities such as outreach, community education, informal counseling, social support and advocacy.*

Community Health Workers (CHWS)			
Promotores(as)	Home Visitor	Community Health Representative	Community Based Doula
Community Outreach Worker	Lay Leader	Outreach Specialist	Peer Educator/Counselor
Community Health Advocate	Patient Advocate	Patient Navigator	Lay Health Advisor
Lay Health Educator	Peer Support Specialist	Linkage Care Coordinator	Coach

Figure 2. Examples of titles under the CHW Umbrella

CHW Qualities

The CHWs' qualities are what make them unique individuals who are instrumental in assisting to improve the overall health of the people they serve. They have the ability to connect with people, based largely on their lived experience, shared background with communities served, and ability to build and foster trust; thus, they can bridge gaps between the client/patient and the organization, and address many factors that affect people's health overall. CHW qualities include but are not limited to being trustworthy, compassionate, responsive, dedicated, self-directed, motivated, persistent, resourceful, creative, unbiased, responsible, reliable, patient, and open-minded.

CHW Skills

CHWs have an array of skills which include service coordination and navigation, communication, advocacy, capacity building, outreach, facilitation, communication, relationship building, and problem solving, to name a few. The CHW Core Consensus Project compiled additional competencies that CHWs should master through experience and/or training, and made them available on their *C3 project website*.

CHW Roles (Scope of Practice)

CHWs can serve in many different roles and can perform a range of tasks and services that are tailored to meet the needs of the communities and individuals they serve. Their roles are dependent upon many different factors. CHW roles include but are not limited to:

- Providing culturally appropriate health education and information
- Building individual and community capacity
- Advocating for individuals and communities
- Conducting outreach
- Care coordination
- Case management
- System and resource navigation
- Participating in and conducting research and evaluation.

Hiring the Right CHW

Select the Right Candidate(s)

When hiring a CHW, it is important to ensure that the CHW has a comprehensive knowledge of the community that they will serve and the skills and qualities essential to the organization and goal of the CHW program. Hiring a CHW who is a part of or knowledgeable about a specific population to assist an organization with developing a program that helps to improve relationships, understanding, and care for a particular population in efforts to meet their health care needs.

Examples:

- If you are hiring someone to be a Perinatal CHW in a neighborhood with particularly high rates of infant mortality, you will seek candidates that are from that neighborhood, is of the same race or ethnicity as the majority of residents of that neighborhood, and has some experience supporting mothers and babies.

- If your CHW will be working with men re-entering society from prison, hire a man who has spent time in prison and has experience navigating the re-entry process.

- If you are going to hire a CHW for to help coordinate services for substance abusers, seek a candidate in recovery who understands that challenge.

In summary, these may be very different candidates than you usually hire on your team, but their familiarity and comfort with your target population will build a strong foundation for effective health improvement. You may need to do targeted outreach in the community to solicit applications from appropriate candidates. An experienced CHW should be a part of the interview team and process, which includes reviewing the resumes of the CHW candidates. Additionally, the individual who will supervise the CHW and is familiar with the skills needed for the position should also be a part of the hiring process.

Onboarding CHWs

Once CHWs have been hired, organizations should ensure that CHWs are fully integrated into the culture and practices of your teams. For example, make sure CHWs are invited to all your regular team meetings and trainings. CHWs should participate in all the internal systems and processes, such as using an Electronic Health Record (if applicable), documenting their patient/client interactions, and communicating the outcomes/results of interactions with the full team. CHWs should be familiar with community resources, identify opportunities for further professional development, and build relationships with partner organizations in the community such as community coalitions, social services, and health and human service agencies.

CHW Core Competency Training and other continuing education opportunities will help CHWs prepare for their work in this field. Some states may require CHWs to meet training and certification standards – and in some areas, this may be required to participate in reimbursement for services provided by CHWs. Additionally, certification and continuing education opportunities can advance the CHW career and workforce.

CHW Core Competency Training

The Center for Community Health Alignment (CCHA) at the University of South Carolina is one organization that offers CHW Core Competency and CHW Supervisor trainings through it's Community Health Worker Institute and ***PASOs***. CCHA is also developing specialty trainings for many focus areas, through which CHWs can gain more tools to better serve specific communities and individuals. Additional information on the trainings that CCHA offer can be found ***here***.

Preparing to Implement a New CHW Program or Initiative

Preparing your team to implement CHW programs and work with CHWs is critical to the success of your program and can ensure that your program is well integrated into your organization and community. Below are a few steps that your organization can take to ensure that your team is prepared.

Educate the Full Organization on the CHW model

Ensure that team members and organizational leaders understand the role of CHWs. Involve the team and the CHW in helping to decide how the CHW will be integrated into their work. In allowing the team to be a part of this process, the uniqueness of the CHW role should be respected and maintained.

Identify Clinical and/or Organizational Champions & Key Stakeholders

It is important to your CHW program to identify organizational champions and key stakeholders early in the development process. Key stakeholder and organizational champions understand the role of CHWs and how they can be an asset to the organization in helping to improve individual and community outcomes. Key stakeholder and CHW champions should be connected to CHW support organizations and training centers, to make sure that they have the tools and latest information on how to best support CHWs.

Designing Your CHW Program with Evaluation in Mind

Always remember to design your program with the program goals and anticipated outcomes in mind. Where CHWs work and their focus should reflect and align with the communities in which CHWs are most needed. To make these determinations, reviewing certain data sources can provide insight. Specifically, reviewing equity-stratified data is suggested. Examples of equity-stratified data include the interactive ***CHW Prioritization Index*** and the ***Spartanburg Racial Equity Index***. Such data can provide additional insight into the resources, strengths, and challenges unique to different communities.

Once where CHWs should work and focus has been decided, the process for documenting CHW activities should be determined. CHW services and activities will ideally be tracked all along, beginning with the start of the program or as early on as possible. There are many systems that can be used to store and track data related to CHW services. Common examples include Microsoft Excel, care management systems, and electronic health records. Developing formal processes of documenting CHW visits may facilitate data collection.

CHW Supervisor Best Practices

It is important for organizations to identify CHW supervisors who have a good understanding of the core roles and competencies of CHWs. CHW supervisors should closely identify with or be able to relate to the work of CHWs. It is also important that CHW supervisors are strong advocates of their supervisees' work.

- Supportive supervision is a best practice and a motivator for CHWs. Because their close connection with particularly vulnerable communities is so valuable, CHWs may not have the same levels of education and professional experience as others on the care team. For this reason, they may benefit from more intensive mentoring.

- Those who supervise and/or work closely with CHWs should attend training to better understand the CHW role, and how to support it. Trainings for CHW supervisors helps clarify the appropriate expectations and needs of employees in the CHW role.

  - Because their job often involves "meeting the client(s) where they are," the work of CHWs is often not confined to the office space and hours. = Supervisors and team members should understand that most CHWs will be spending time in client homes or in community outreach, for example, and they may work evenings and weekends if their clients have more availability at those times. Therefore, it may not be reasonable to expect the CHW to be at their desk during all the typical workday hours.

  - Supervisors should provide ongoing mentoring and conduct assessments to provide regular feedback on the CHW's performance (i.e., quarterly, yearly, and/or as needed).

  - Supervisor presence is also critical to the success of the CHW. They should check-in with CHWs regularly (i.e., weekly) and as needed to discuss patient and community progress, any challenges they may be experiencing, or needs they may have.

  - It is important for supervisors and/or organizational leaders to be proactive by thinking through and planning opportunities for CHWs to advance in their career – consider opportunities for growth. Find additional information about supervisor training opportunities that CCHA offers *here*.

Community Health Workers in Action: Resources that Highlight Getting Started with Your CHW Program

- **Support for Community Health Workers**
  In many states there are associations who advocate by being a voice for CHWs. For example, in South Carolina, there is the *South Carolina Community Health Workers Association (SCCHWA)*.

- There is also a *National Association of Community Health Workers (NACHW)* whose mission is to unify the voices of the Community Health Workers and strengthen the profession's capacity to promote healthy communities.

- The *Community Health Workers (CHW) Inclusion Checklist* from the Centers for Disease Control and Prevention provides a general framework to assist in including CHWs and integrating the CHW model in healthcare settings.

- The *Community Health Workers: Pivotal to Community Health and Well-being* is a poster developed by the Community Health Worker Core Consensus (C3) Project that outlines the roles/scope of practice and competencies (skills and qualities) for CHWs.

- *I Hired A Community Health Worker and Now We Work Miracles* is an article about a healthcare provider who shares about the impact of a CHW in helping patients to improve their health outcomes.

- *Advancing CHW Engagement in COVID-19 Response Strategies* is a playbook developed by the National Community-Based Workforce Alliance to facilitate both the conceptualization and operationalization of CHW engagement for pandemic response strategies. .

Technical Assistance Support

We are here to assist. Check out how CCHA can *support your organization*.

Acknowledgments

The Center for Community Health Alignment strongly believes that when attempting to co-create strategies and solutions with our community, formal education is not enough. In addition to subject matter expertise, we must have folks with extensive lived experience at the table to provide much needed context to the topics being discussed. This toolkit has been developed in collaboration with Community Health Workers (CHWs) and CHW allies with extensive expertise in planning, implementing, and showing the impact of the CHW model. Thank you to all the CHWs and CHW Allies that contributed to the creation of this best practice toolkit section!