

# PREPARE YOUR ORGANIZATION FOR CHW TRAINING PROGRAM APPROVAL

## A step-by-step guide



MEL & ENID ZUCKERMAN COLLEGE OF PUBLIC HEALTH

Arizona Prevention  
Research Center



**AzCHOW**

Arizona Community Health Workers Association



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# INTRODUCTION

The purpose of this resource guide is to provide support for organizations that plan to submit their Community Health Worker (CHW) training programs for approval by the Arizona Community Health Workers Association (AZCHOW). Approved training programs prepare Arizona CHWs to apply for Voluntary Certification administered by the Arizona Department of Health Services (ADHS).

Approved CHW training programs are based on the 10 CHW Core Competencies, which outline the essential skills and abilities that will ensure that CHWs can effectively fulfill their roles and achieve individual health and community outcomes. The CHW core competencies: 1) are evidence-based; 2) were developed through a national consensus process; and 3) were approved by the Arizona Public Health Association, and the Arizona CHW Workforce Coalition

Most organizations will complement CHW Voluntary Certification training with job-specific topics, such as disease-specific management and care or activity documentation processes that a CHW may need to fulfill his or her job responsibilities. This specific additional training will build upon the CHW core competencies. The relationship between Core Competencies and Specific Training is outlined in Figure 1.

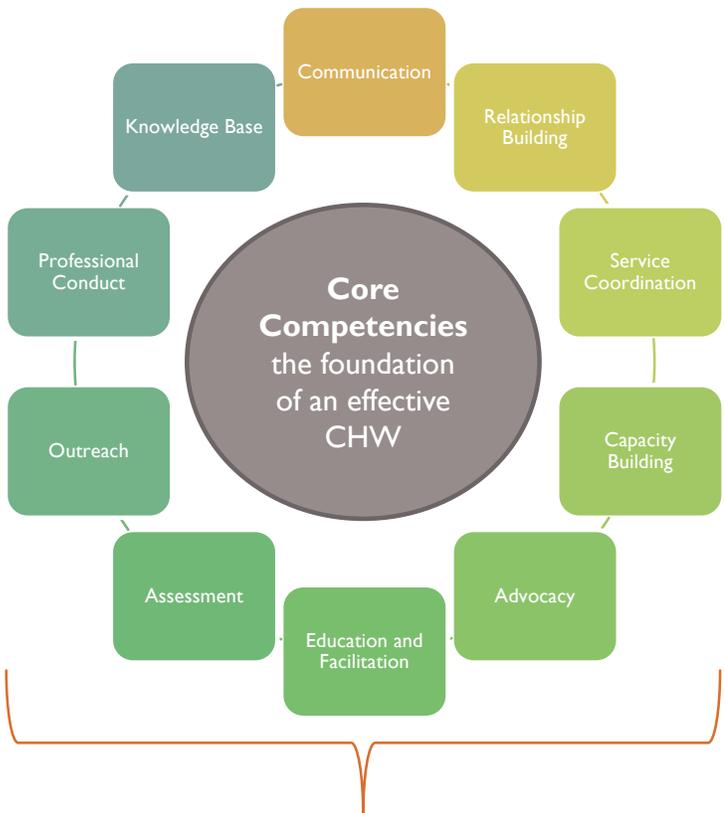
The Training Program Approval process was designed so that a wide variety of organizations could apply for approval. Any organization—health centers, community-based organizations, nonprofits, health departments, etc.—can apply for Training Program Approval. The training methods and approach may vary based on the needs and resources of the organization. Training Program Approval is ultimately a way to ensure that your organization is training CHWs consistently in the CHW Core Competencies.

# CHW Core Competencies

and how they relate to the training program approval process

The Core Competencies are the fundamental skills, knowledge and attitudes that a CHW must have in order to work effectively

Specific Training builds on the Core Competencies to allow the CHW to fulfill his/her job duties.



Focus of criteria for Training Program Approval.

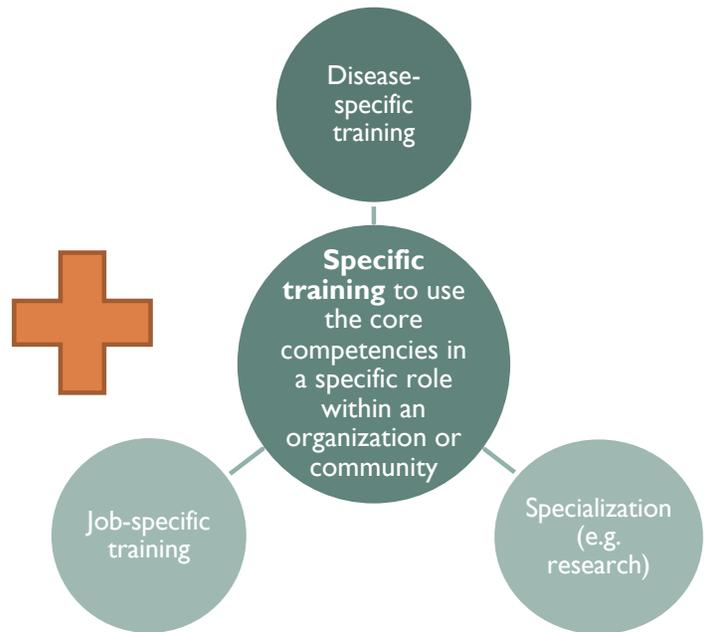


Figure 1: Core Competencies and Specific Training



## HOW TO USE THIS GUIDE

We anticipate that you are already training your CHW workforce in many of the core competencies, and this guide will help you to document and standardize those activities, as well as map them to specific core competencies. If you complete each step in this guide, you will have almost everything you need to submit your application for Training Program Approval through AzCHOW.

This guide is NOT a training program. We recommend that a team of stakeholders from your organization (ideally an experienced CHW, a CHW supervisor, and an administrator) consider the context of your organization and the priorities of your service population. The stakeholder team can map out your current activities to the CHW core competencies, identify gaps in training, and carefully review and incorporate these materials into a comprehensive training curriculum.

# PREPARE YOUR ORGANIZATION FOR TRAINING PROGRAM APPROVAL: A STEP-BY-STEP GUIDE

If you follow the 10 steps outlined in Table 1, your organization will be prepared for Training Program Approval. As noted above, we recommend that a stakeholder group including CHWs and CHW supervisors complete this step-by-step process.

After completing these steps, your organization will have most of the materials needed to fill out the application for training program approval. The time it takes your organization to complete this process will vary depending on what materials you already have and what you have to develop.

Technical assistance is available; please contact Katy Tucker at [kmtucker@email.arizona.edu](mailto:kmtucker@email.arizona.edu) for more information.

Table 1: 10 steps to training program approval

Step 1	Convene a CHW Training Program Approval Working Group
Step 2	Learn about the CHW Training Program Approval Process
Step 3	Gather existing training resources and activities
Step 4	Formalize training activities
Step 5	Map training activities to the core competency checklist
Step 6	Identify gaps in training activities
Step 7	Design new training activities to fill the gaps
Step 8	Create a training schedule and tracking form
Step 9	Gather application materials
Step 10	Submit and celebrate!



## STEP 1: CONVENE A TRAINING PROGRAM APPROVAL WORKING GROUP

In order to prepare for Training Program Approval, you will need the support and expertise of different individuals.

We recommend that you convene a stakeholder group that includes at least one experienced CHW and a CHW supervisor/manager. It is also helpful to include individuals with training or training development experience. This group should commit to meeting regularly throughout the process in order to complete the steps, develop and implement training, and provide their experiences and perspectives on the process.

## STEP 2: LEARN ABOUT THE TRAINING PROGRAM APPROVAL PROCESS

Familiarize yourself with the resources for training program approval on the AzCHOW Website at <https://www.azchow.org/training-program-approval/>. This will provide more context and information about the application process. These resources include:

- [CHW Training Program Approval Guidelines](#)
- [CHW Training Program Approval Informational Meeting Recording.](#)

The training program approval application is not available online. Please email [floribella@azchow.org](mailto:floribella@azchow.org) or [kmtucker@email.arizona.edu](mailto:kmtucker@email.arizona.edu) to obtain the application.

**Keep in mind:** In order to be eligible for training program approval, an organization must demonstrate that they consistently train their newly hired CHWs in the 10 Core Competencies. This means that the organization must cover all 10 competencies and at least 90% (53 out of 59) of the associated skills. A complete list of the Core Competencies and Associated Skills can be found in Appendix A.



## STEP 3: GATHER EXISTING TRAINING RESOURCES AND ACTIVITIES

The first step is to gather the materials and activities that your organization uses to train newly hired CHW staff or CHWs without voluntary certification. These materials should be ones that you use consistently with newly hired CHWs, or plan to use consistently in the future. Think of everything you do to prepare a CHW for his or her role in your organization. Training materials could include:

- Employee onboarding sessions (workplace policies, documentation procedures, setting up and using technology)
- CHW shadowing and mentorship activities
- Training sessions, either on site, online or with partner organizations.
- Conference and workshop participation

Your organization may focus on disease-specific training, such as diabetes or maternal and child health, with newly hired CHWs. This disease-specific training may be necessary for the CHW to complete his or her job, but they are not necessarily materials that you would include in the Training Program Approval application. It is possible that these disease-specific training activities cover some of the Core Competencies; however, it is also possible that not every newly hired CHW will need the same disease-specific training.

**Keep in mind:** the training materials submitted in the training program approval application should be delivered consistently to newly hired CHWs.

**Technical assistance is available!** If you aren't sure where to begin, or need help understanding the requirements of training program approval, contact Kathryn Tucker at [kmtucker@email.arizona.edu](mailto:kmtucker@email.arizona.edu) to set up a meeting.



## STEP 4: FORMALIZE TRAINING ACTIVITIES

Some of your organization's training activities may already be formalized and standardized—that is, there is a clear session description with learning objectives.

However, some of your organization's training activities may be more informal. For example, your CHW trainees shadow more experienced trainees or attend conferences as part of their training, but you have never created a formal description or set of learning objectives for these activities.

The training program approval application will ask you to submit session descriptions and learning objectives. In addition, the learning objectives and session descriptions will help you to complete the Core Competency Checklist (Step 5).

A training activity should include the following components:

- learning objectives and related core competencies
- content/activities
- evaluation method.

A learning objective states what the CHW will be able to do after the training activity. They can be modeled after the Core Competencies and associated skills found in the Core Competency Checklist in Appendix A.

The content/activities outline what the CHW trainee should be doing during the activity. The evaluation methods can include a discussion or debrief with the CHW supervisor, a written reflection on what they learned, or structured observation and feedback.

The evaluation methods should be linked to the objectives and can be formal or informal. The purpose of the evaluation method is to ensure that the CHWs are learning the appropriate content. They might include questions asked by the instructor at the end of the session, a demonstration of learning through role play or presentation, or the creation of a resource or material. A test might be appropriate in some cases, such as ensuring that the CHWs understand HIPAA, but we encourage organizations to use adult education and popular education methods (see Appendix E) whenever feasible.

For example, many newly hired CHWs can learn a lot from shadowing more experienced CHWs and learning from them, and this might already be a part of your training methods. A shadowing experience can be formalized into a training activity. Table 2 provides an example of a shadowing activity as a training session, and Appendix B provides more information about how to create a shadowing training activity.

Conferences, training workshops and other events can also be included as a training activity, as long as newly hired trainees will consistently be able to attend them. For example, if one of the training activities is to attend the annual AzCHOW conference, Table 3 shows potential objectives, activities and evaluation methods.

Once you have formalized all of your existing training activities with objectives, a description and evaluation methods, it's time to map them to the Core Competency Checklist.



**Table 2: Example of a shadowing activity as a formalized training session**

Name of CHW Trainee:	
Name of CHW being shadowed:	
<b>Objectives: Core Competencies and Associated Skills</b>	<p>After the shadowing activities, the CHW will demonstrate an improved understanding of the following CHW Core Competencies and associated skills:</p> <p>Communication:</p> <ul style="list-style-type: none"> <li>• Communicate with the community served</li> <li>• Communicate in ways that engage and motivate</li> <li>• Communicate using plain and clear language</li> </ul> <p>Outreach:</p> <ul style="list-style-type: none"> <li>• Prepare and disseminate materials</li> <li>• Build and maintain current resource inventory</li> </ul>
<b>Shadowing Activities</b>	<p>Shadow a CHW as they make phone calls to recruit participants for a health education session.</p> <ul style="list-style-type: none"> <li>• Use what you learned to make recruitment phone calls under the supervision of the experienced CHW</li> </ul> <p>Shadow a CHW at a community outreach event to recruit participants for community health programs</p> <ul style="list-style-type: none"> <li>• Use what you learned to interact with potential participants under the supervision of the experienced CHW</li> </ul>
<b>Shadowing Observations and Questions (for CHW trainee)</b>	<p>During the shadowing activities, the CHW trainee should consider these questions and observe these actions:</p> <ul style="list-style-type: none"> <li>• How does the CHW prepare for the recruitment event/calls? What materials does s/he get?</li> <li>• How does the CHW communicate/explain the program? How does the CHW motivate people to attend the program?</li> <li>• What sorts of nonverbal communication does the CHW use? Pay attention to body language, tone of voice and how the CHW presents him/herself.</li> <li>• What does the CHW do when a potential client is not interested in the information? How does s/he react?</li> </ul>
<b>Post-shadowing debrief (Evaluation)</b>	<p>After all activities are complete, the CHW trainee will meet with their supervisor and discuss their experience. The CHW trainee should identify the best ways to communicate and discuss how they can develop their own communication skills.</p>

**Table 3: Example of conference/workshop attendance as a formal training activity**

<b>Name of CHW Trainee:</b>	
<b>Objectives: Core Competencies and Associated Skills</b>	<p>During the AzCHOW conference, the CHW attendee will examine the following Core Competencies and associated skills:</p> <p>Professional conduct:            Pursuing continuing education and lifelong learning activities            Participating in professional development of peer CHWs and in CHW networking groups.</p>
<b>Activities</b>	<p>The CHW trainee will attend the AzCHOW conference and participate in networking activities. The CHW trainee can choose sessions to attend based on his/her interests and job duties.</p> <p>Total time: 10 hours of conference sessions</p>
<b>Post-shadowing debrief (Evaluation)</b>	<p>After attending the AzCHOW conference, the CHW trainee will review the following questions to prepare his/her answers, and then discuss it with his/her supervisor:</p> <p>What is AzCHOW? What are professional organizations and why are they important?</p> <p>What are three interesting or important things that you learned at the AzCHOW conference?</p> <p>Look at the list of CHW Core Competencies and Associated skills. What are 2-3 skills you think you learned more about during the conference?</p>



## STEP 5: MAP EXISTING TRAINING ACTIVITIES TO THE CORE COMPETENCY CHECKLIST

The Core Competency Checklist is a major aspect of the Training Program Approval Application. There are 10 Core Competencies with 59 Associated Skills. In order to meet the requirements for an approved CHW Training Program, an organization must demonstrate that they cover at least 90% (53 out of 59) of the associated skills in their training program.

After gathering all of the training materials, the working group can begin to map training materials to the Core Competencies. Look at all of the training materials that you gathered in Steps 2-4 and begin to fill in the Core Competency Checklist found in Appendix A of this Guide.

Please note that a single training session or activity could cover multiple associated skills. Likewise, a single associated skill could be covered in more than one training activity. Figure 2 shows an example from an actual Training Program Approval application

The organization that submitted the application shown in Figure 2 indicates three different training activities for the Advocacy core competency, and maps each activity to the associated skills. This organization also briefly indicated how the training activity covers the associated skill.

If you are not sure where to map a training activity, consider the objectives, content and activities in the training materials. Start by identifying which Core Competencies the training activity covers, and then read the associated skills. The training activity may not explicitly mention the Core Competencies and Associated Skills, but it still might cover relevant content.

For example, one of the training activities might be a workshop on diabetes self-management. Diabetes self-management is not a core competency or associated skill. However, the content of the workshop could include information or activities covering some of the following competencies and skills:

- Relationship-Building: conducting self-management coaching and using interviewing techniques (motivational interviewing)
- Service Coordination: Coordinating care, facilitating the development of an individual or group action plan and goal attainment

- Capacity Building: helping other to identify goals and develop to their fullest potential
- Education and facilitation: seeking out appropriate information and responding to questions about pertinent topics

5. Advocacy	
5a. Contribute to policy development	<ol style="list-style-type: none"> <li>1. <b>Advocacy Training (2 hours, In-Person):</b> The student will learn how community health workers have contributed to policy change in the past and will be empowered to contribute to future policy development by obtaining the knowledge and skills needed for advocacy development.</li> <li>2. <b>Parent Ambassador (8 hours, In-Person):</b> Students learn how to contribute in the development of health promotion policies within the Maricopa public school system.</li> <li>3. <b>Walkability Assessment (2 hours, In-Person):</b> Students learn how to contribute to the development of policies that improve the "walkability" of the sidewalks in their community.</li> </ol>
5b. Advocate for policy change	<ol style="list-style-type: none"> <li>1. <b>Advocacy Training (2 hours, In-Person):</b> The student will learn how to advocate for policy change by developing an advocacy action plan to address a pertinent health issue in their community.</li> <li>2. <b>Parent Ambassador (8 hours, In-Person):</b> Students learn how to develop and implement an advocacy action plan directed at initiating positive change in their community's schools.</li> </ol>
5c. Speak up for individuals and communities	<ol style="list-style-type: none"> <li>1. <b>Advocacy Training (2 hours, In-Person):</b> The student will learn how to develop advocacy action plans to address physical and socioeconomic barriers to health affecting individuals and communities which often do not speak up for change</li> <li>2. <b>Parent Ambassador (8 hours, In-Person):</b> The student will learn how to speak up for parents and guardians with children in the public-school system.</li> <li>3. <b>Walkability Assessment (2 hours, In-Person):</b> Students learn how to speak up for individuals and communities affected by poorly maintained or non-existent walking spaces to participate in physical activity.</li> </ol>

*Figure 2: Example from a Core Competency Checklist of an organization that applied for Training Program Approval*

**Keep in mind:** If a training activity is geared towards a CHW audience, there is a good chance that it will cover one or more of the associated skills!

## STEP 6: IDENTIFY GAPS IN YOUR TRAINING ACTIVITIES

After you complete the mapping process, the working group may notice gaps. If your existing training activities do not cover 90% of the associated skills, then you may need to add more training activities.

Before you move on to Step 7 and begin to create new training activities, take a moment to look over the competencies and associated skills that are missing in your training program and identify potential areas for intervention.

You can likely group similar Competencies and Associated Skills into single training activities. For example, if you are missing multiple associated skills under the Capacity Building core competency, you may be able to design a single training activity that covers several of the similar associated skills.

You also may be able to add activities to existing training activities in order to fulfill more associated skills. For example, if your existing training activities cover almost all of the associated skills for the communication core competency, it may be possible to alter one of the training activities you already listed to ensure that the missing skill is covered.

After you have a sense for what kind of sessions you will need or how you need to adapt existing activities, you are ready to design new training activities.





## STEP 7

### DESIGN NEW TRAINING MATERIALS TO FILL THE GAPS

It can be intimidating to begin to fill those training gaps, but there is no need to ‘reinvent the wheel’! There are many free or low-cost, high-quality resources that organizations can use to develop or supplement their existing training programs in order to prepare it for Training Program Approval.

Table 4 shows a list of resources related to each Core Competency. Each resource in this manual is mapped to a specific competency, and can be adapted to your training approach. They include readings, hands-on activities and full training sessions.

This list is not comprehensive. If you are aware of other resources that could be used as part of a Core Competency Training, please let us know!

A description of all training sources, including web sites, is found in Appendix C. Additional materials that may be helpful as you create new training sessions is found in Appendix D.

Many of the resources listed in this guide are designed to build upon existing training activities to create a complete training session. For example, a successful training session could incorporate a reading provided in this Guide, along with a discussion, role play, or resource development. In addition, the additional training activities could include shadowing and other mentorship activities with more experienced CHWs.

We recommend that organizations utilize popular education and adult education methods. More information about these methods can be found in Appendix E. The resources provide ideas, activities, and readings, and the organization is responsible for crafting these resources into training activities.

Remember that each training activity should include learning objectives, session activities/description, and an evaluation method. Again, you can use the Core Competencies and associated skills as learning objectives. An example of a training activity based on the resources in the above table is shown in Table 5.

As you create the new training activities, add them to the Core Competency Checklist.

**Table 4: Resource Guide to Existing Training Materials by Core Competency**

Core Competency	Resources Related to this Competency
Advocacy	Community Tool Box: <a href="#">Advocating for Change</a>
Assessment	<p><a href="#">North Carolina Farmworker Health Program Outreach Manual</a>: Chapter 4 Health Assessments</p> <p>CDC TRAIN: <a href="#">Community-Based Planning and Evaluation for Wellness</a></p> <p>Community ToolBox: <a href="#">Assessing Community Needs and Resources</a></p> <p>Community Tool Box self-guided modules</p> <p><a href="#">Identifying Community Health Needs and Assets</a></p> <p><a href="#">Conducting Community Health Assessments</a></p>
Capacity Building	CDC TRAIN: <a href="#">Community Engagement and Capacity Building Basic Concepts</a>
Communication	MHP Salud: <a href="#">A Guide to Developing Easy to Understand Material for Any Audience</a>
Capacity Building	CDC TRAIN: <a href="#">Community Engagement and Capacity Building Basic Concepts</a>
Education and Facilitation	<p>MHP Salud Dinamicas Booklet <a href="http://2ow7t71bjuyu4dst8o28010f.wpengine.netdna-cdn.com/wp-content/uploads/2013/11/Dianmicas-Booklet-Bilingual1.pdf">http://2ow7t71bjuyu4dst8o28010f.wpengine.netdna-cdn.com/wp-content/uploads/2013/11/Dianmicas-Booklet-Bilingual1.pdf</a></p> <p><a href="#">North Carolina Farmworker Health Program Outreach Manual</a>: Chapter 7 Health Education</p>
Knowledge Base	<p>Western Region Public Health Training Center/ TRAIN Arizona: <a href="#">Orientation to Public Health</a></p> <p>Western Region Public Health Training Center: <a href="#">Public Health Essentials in Action Online</a></p> <p>CDC TRAIN: <a href="#">Healthy Communities: Exploring the Intersection of Community Development and Health</a></p> <p>CDC TRAIN: <a href="#">Americans with Disabilities Act (ADA) Compliance</a></p> <p>CDC TRAIN: <a href="#">HIPAA/FERPA 101</a></p> <p>CHW Central: <a href="#">CHW Code of Ethics Toolkit</a></p> <p>Western Region Public Health Training Center/ TRAIN Arizona: <a href="#">Promoting Healthy Choices and Community Changes: an E-learning program for Promotores de Salud</a></p> <p>Western Region Public Health Training Center/TRAIN Arizona: ACA Training of Community Trainers <a href="#">English</a> and <a href="#">Spanish</a> version</p>

Resource Guide continued

<p>Outreach</p>	<p><a href="#">North Carolina Farmworker Health Program Outreach Manual</a>: Chapter 3 Outreach, includes safety tips; Chapter 6 Case Management          Community Tool Box: <a href="#">Using Outreach to Increase Access</a>          Community Tool Box: <a href="#">Identifying Community Needs and Assets</a></p>
<p>Professional Conduct</p>	<p>CDC TRAIN: <a href="#">Professionalism for Public Health Workers</a></p>
<p>Relationship Building</p>	<p>Community Tool Box <a href="#">Building and Sustaining Relationships</a></p>
<p>Service Coordination</p>	<p>MHP Salud: <a href="#">Virtual Eligibility Guide</a> (bilingual, reading)          MHP Salud: <a href="#">Quick Guide to Understanding Health Insurance</a> (Spanish, reading)  <a href="#">NCFHP Outreach Manual</a>: Chapter 1, preparing needed resources and provider network.          MHP Salud: <a href="#">Promotor/a de Salud Manual</a> Chapter 2 Community Resource List</p>

## Table 5: Sample Training Activity to fulfill missing associated skills in the outreach and assessment core competencies

### Sample Outreach Learning Activity

Total Time: 2-3 hours

**Learning Objectives:** after the session, the CHW trainee will examine the following Core Competencies and skills:

Outreach:

- Building and maintaining a current resource inventory

Assessment

- Participating in community assessment through observation and active inquiry

### Training activities:

Read the Community Tool Box article on [Assessing Community Needs and Identifying Community Assets](#)

Individually or in pairs, follow the steps in the Community Tool Box article to create a map of at least 10 community assets that can help you in your work. This can include people doing similar work, resources where you can refer people, organizations or groups that can help you to recruit participants, and other assets that will help you in your work for the organization.

You can find some information online, but it's also important to call or visit the organization/group to get a complete and accurate idea of which services and resources they offer.

### Evaluation:

Share your asset map with your supervisor and at least one more experienced CHW. Show them what you learned, why it will be useful in your work, and why it's a community asset. The experienced CHW and supervisor will provide feedback and may suggest other organizations to include in your asset map.

## STEP 8

### CREATE A TRAINING SCHEDULE AND TRACKING FORM

Once you have covered at least 90% of the Core Competencies with your training activities, it's time to put the schedule together.

In order for an organization to have an approved training program, it must demonstrate that it will train CHWs consistently in the Core Competencies. The training schedule is a way to ensure that all CHW trainees receive the same training.

An organization can create a training schedule to fit their needs. Some organizations might prefer to complete most or all of the training activities within the first few weeks after hire. Others might spread out the training activities over several months with just a few hours each week.

Some of the training activities may not be controlled by the organization—for example, conferences and workshops may take place only at specific times throughout the year. It's important to factor these considerations in to your training schedule.

In order to be approved, the organization must also demonstrate that the training schedule will be followed consistently with each new CHW hire. One way to establish this is to have a system to track training activities that each CHW must participate in. Some organizations may already use online learning management systems that can help them to track this information. You can also use a spreadsheet or document to track training activities and ensure that the newly-hired CHW completes them all.





## **STEP 9: GATHER THE REST OF THE APPLICATION MATERIALS**

Now that you have the Core Competency Checklist, session descriptions and training schedule complete, you are almost done with the application! Read over the Training Program Approval Guidelines again, and contact AzCHOW to ask for the application forms (see Step 2).

The final supporting documents that you need are the resumes or CVs of the trainers/instructors and the CHW program coordinators/supervisors. Once you receive the application forms, you can fill out the information about the program history, and prepare materials for submission.

## **STEP 10 SUBMIT THE APPLICATION AND CELEBRATE!**

You have now completed the CHW Training Program Approval application. After you submit, AzCHOW will put together a review committee and move forward with the application process.

# APPENDIX A: CORE COMPETENCIES AND ASSOCIATED SKILLS CHECKLIST

Instructions: use the table below to map the CHW core competencies to specific sessions in the training program. Please use the session titles or used in the attached training schedule. The training program should include content that meets at least 90% (53 out of 59) of the core competencies in the table below.

Communication	
<i>The CHW training program must include content on:</i>	<i>Indicate the session(s) or class(es) where this content is included</i>
Using language confidently	
Using language in ways that engage and motivate	
Communicating using plain and clear language	
Communicating with empathy	
Listening actively	
Preparing written communication including electronic communication	
Documenting work	
Communicating with the community served	

Core Competency Checklist continued

<b>Relationship-Building</b>	
<i>The CHW training program must include content on:</i>	<i>Indicate the session(s) or class(es) where this content is included</i>
Providing coaching and social support	
Conducting self-management coaching	
Using interviewing techniques (e.g. motivational interviewing)	
Working as a team member	
Managing conflict	
Practicing cultural humility	
Understanding the culture of institutions	
<b>Service Coordination</b>	
<i>The CHW training program must include content on:</i>	<i>Indicate the session(s) or class(es) where this content is included</i>
Coordinating care (includes identifying and accessing resources and overcoming barriers)	
Making appropriate referrals	
Facilitating the development of an individual and/or group action plan and goal attainment	
Coordinating CHW activities with clinical and community services	
Follow-up and tracking care and referral outcomes	
<b>Capacity Building</b>	
<i>The CHW training program must include content on:</i>	<i>Indicate the session(s) or class(es) where this content is included</i>
Helping others to identify goals and develop to their fullest potential	

*Core Competency Checklist continued*

Working in ways that increase individual and community empowerment	
Networking, building community connections, and building coalitions	
Teaching self-advocacy skills	
Conducting community organizing	
<b>Advocacy</b>	
<i>The CHW training program must include content on:</i>	<i>Indicate the session(s) or class(es) where this content is included</i>
Contributing to policy development	
Advocating for policy change	
Speaking up for individuals and communities	
<b>Education and Facilitation</b>	
<i>The CHW training program must include content on:</i>	<i>Indicate the session(s) or class(es) where this content is included</i>
Using empowering and learner-centered teaching techniques	
Using a range of appropriate and effective educational techniques	
Facilitating group discussions and decision-making	
Planning and conduct classes and presentations for a variety of groups	
Seeking out appropriate information and responding to questions about pertinent topics	
Finding and sharing requested information	
Collaborating with other educators	
Collecting and using information from and with community members	

Core Competency Checklist continued

<i>Assessment</i>	
<i>The CHW training program must include content on:</i>	<i>Indicate the session(s) or class(es) where this content is included</i>
<i>Participating in individual assessment through observation and active inquiry</i>	
<i>Participating in community assessment through observation and active inquiry</i>	
<i>Outreach</i>	
<i>The CHW training program must include content on:</i>	<i>Indicate the session(s) or class(es) where this content is included</i>
<i>Conducting case-finding, recruitment and follow-up</i>	
<i>Preparing and disseminating materials</i>	
<i>Building and maintaining a current resource inventory</i>	
<i>Professional Conduct</i>	
<i>The CHW training program must include content on:</i>	<i>Indicate the session(s) or class(es) where this content is included</i>
<i>Setting goals and developing and following a work plan</i>	
<i>Balancing priorities and managing time</i>	
<i>Maximizing personal safety while working in community and/or clinical setting</i>	
<i>Observing ethical and legal standards (e.g. CHW Code of Ethics, Americans with Disabilities Act (ADA), Health Insurance Portability and Accountability Act (HIPAA))</i>	
<i>Identifying situations for mandatory reporting and carry out reporting requirements</i>	
<i>Participating in professional development of peer CHWs and in CHW networking groups</i>	
<i>Setting boundaries and practicing self-care</i>	

Core Competency Checklist continued

<b>Knowledge Base</b>	
<i>The CHW training program must include content on:</i>	<i>Indicate the session(s) or class(es) where this content is included</i>
<i>Social determinants of health and related disparities</i>	
<i>Pertinent health issues</i>	
<i>Healthy lifestyles and self-care</i>	
<i>Mental/behavioral health issues and their connection to physical health</i>	
<i>Health behavior theories</i>	
<i>Basic public health principles</i>	
<i>Community served</i>	
<i>United States health and social service systems</i>	

# APPENDIX B: EXAMPLE SHADOWING FORM

## Community Health Worker Core Competency Training Shadowing and Mentoring Form Template

**Purpose:** The purpose of this document is to provide a template shadowing form that organizations can adapt to support Core Competency training for Community Health Workers (CHWs).

New CHWs can learn skills from observing and working with more experienced CHWs. This shadowing and mentorship is an important way for CHWs to learn and increase their confidence.

The forms on the following pages are meant to provide a structured way for organizations to ensure that the shadowing experience is effective in preparing the CHW for their role and understanding their Core Competencies. It provides an example of how an organization can use shadowing/mentoring as a consistent and systematic training tool for new CHWs. Please note that this is an activity-focused shadowing form, and an organization may have multiple shadowing forms to cover different activities.

## Shadowing Form Template

Name of CHW Trainee	
Name of CHW being shadowed:	
Shadowing Activities	Indicate what shadowing activities the CHW will engage in.
Core Competencies and Associated Skills	<p>Indicate which Core Competencies and Associated Skills will be the focus of this shadowing session. A single shadowing activity might cover multiple Core Competencies and Associated Skills, but please ensure that each skill can be observed and discussed in a single shadowing session.</p> <p>A complete list of the Core Competencies and Associated Skills can be found at the bottom of this document</p>
Shadowing Observations and Questions	<p>Suggest observations and questions that can guide the CHW trainee's learning experience.</p> <p>These questions can help CHW trainees to understand each Core Competency and associated skill more completely</p>
Post-Shadowing Debrief	<p>Indicate what the CHW trainee should do after the shadowing session. This could include discussions and reflections with the experienced CHW trainer, reporting to the supervisor, or writing about his/her experience. The post- shadowing de-brief should include a way for the training manager/supervisor to verify that the Core Competencies and Associated Activities were demonstrated and discussed.</p>

I confirm that the activities on this form were completed as indicated.

\_\_\_\_\_  
Signature of CHW Trainee

\_\_\_\_\_  
Signature of CHW being shadowed

\_\_\_\_\_  
**Signature of CHW Training Manager/Supervisor**

<i>Example Shadowing Form: Recruitment and Outreach</i>	
Name of CHW being shadowed:	
Shadowing Activities	<p>Recruitment Activities:</p> <ul style="list-style-type: none"> <li>Shadow a CHW as they make phone calls to recruit participants for a health education session.</li> <li>Use what you learned to make recruitment phone calls under the supervision of the experienced CHW</li> <li>Shadow a CHW at a community outreach event to recruit participants for community health programs</li> <li>Use what you learned to interact with potential participants under the supervision of the experienced CHW</li> </ul>
Core Competencies and Associated Skills	<p>Communication:</p> <ul style="list-style-type: none"> <li>Communicate with the community served</li> <li>Communicate in ways that engage and motivate</li> <li>Communicate using plain and clear language</li> </ul> <p>Outreach:</p> <ul style="list-style-type: none"> <li>Prepare and disseminate materials</li> <li>Build and maintain current resource inventory</li> </ul>
Shadowing Observations and Questions	<p>How does the CHW prepare for the recruitment event/calls? What materials does s/he get?</p> <p>How does the CHW communicate/explain the program? How does the CHW motivate people to attend the program?</p> <p>What sorts of nonverbal communication does the CHW use? Pay attention to body language, tone of voice and how the CHW presents him/herself.</p> <p>What does the CHW do when a potential client is not interested in the information? How does s/he react?</p>
Post-Shadowing Debrief	<p>After all activities are complete, the CHW trainee should meet with their supervisor and discuss their experience. The CHW trainee should identify the best ways to communicate and discuss how they can develop their own communication skills.</p>

I confirm that the activities on this form were completed as indicated.

\_\_\_\_\_  
Signature of CHW Trainee

\_\_\_\_\_  
Signature of CHW being shadowed

\_\_\_\_\_  
**Signature of CHW Training Manager/Supervisor**

# APPENDIX C: ADDITIONAL INFORMATION ABOUT THE RESOURCES IN THIS GUIDE

## Centers for Disease Control and Prevention (CDC)

Tools for putting Social Determinants of Health Into Action:  
<https://www.cdc.gov/socialdeterminants/tools/>

CDC TRAIN: <https://www.train.org/cdctrain/welcome>

The Centers for Disease Control and Prevention compiles resources from across the US and provides training and technical assistance. The CDC TRAIN platform contains free online training modules in a variety of topics. Please note that the CDC includes information for a variety of health and public health professionals, and training topics should be reviewed regularly to ensure that they are relevant to the work and needs of a CHW.

## CHW Central

Website: <https://www.chwcentral.org/about-chw-central>

CHW Central is a global resource for/about CHWs. Resources include published research, training curriculum, case studies, manuals and other tools from across the world. Please note that the resources are not all geared towards a CHW audience, and organizations should review materials in order to determine if they are appropriate.

## Community Tool Box:

Website: <https://ctb.ku.edu/en> (English) and <https://ctb.ku.edu/es> (Spanish)

The Community Tool Box from the University of Kansas is a free online resource that provides accessible and easy-to-understand guides to support community health and development. Some of the materials from the Community Tool Box are available as [online learning modules in TRAIN](#) or as [training curriculum for purchase](#).



## **MHP Salud :**

Website: <https://mhpsalud.org/>

Resource Portfolio: <https://mhpsalud.org/free-resource-portfolio/>

MHP Salud is a national nonprofit organization that has implemented and run CHW programs for over 35 years. The free resource portfolio on their website contains training and technical support materials in both English and Spanish. The resources mentioned in this Guide are specific to the CHW Core Competencies, but MHP Salud also has many resources for specific training, particularly for Latinx and migrant health promotion. The resources are free, but you will need to create a login in order to download them.

## **North Carolina Farmworker Health Program Outreach Manual**

Website: <https://www.ncfhp.org/>

Manual: [https://www.ncfhp.org/wp-content/uploads/2016/09/NCFHP-Outreach-Manual\\_2012.pdf](https://www.ncfhp.org/wp-content/uploads/2016/09/NCFHP-Outreach-Manual_2012.pdf)

The North Carolina Farmworker Health Program is housed in the North Carolina Office of Rural Health. NCFHP works with local agencies to respond to gaps in health care that may prevent farmworkers from accessing health care services. The Outreach Manual contains activities and readings that can be adapted for general CHW training, as well as resources for CHWs working with farmworkers. The website also contains other resources and presentations that may be helpful for CHWs who work with farmworkers.

## **Western Region Public Health Training Center/ TRAIN Arizona**

WRPHTC Website: <https://moodle.publichealth.arizona.edu/>

TRAIN Arizona: <https://www.train.org/arizona/welcome>

The Western Region Public Health Training Center provides free competency-based training for public health professionals, students and community members. Their online and self-paced training modules cover a wide variety of topics. Please note that the WRPHTC includes training sessions for a variety of health and public health professionals, and training topics should be reviewed regularly to ensure that they are relevant to the work and needs of a CHW.

## APPENDIX D: ADDITIONAL RESOURCES

The following resources are not listed in the CHW Training Resources by Competency table, but may help organizations that are developing a training program.

### **Foundations for Community Health Workers Textbook**

Book on Amazon: [https://www.amazon.com/Foundations-Community-Health-Workers-Jossey-Bass-dp-1119060818/dp/1119060818/ref=mt\\_paperback?\\_encoding=UTF8&me=&qid=](https://www.amazon.com/Foundations-Community-Health-Workers-Jossey-Bass-dp-1119060818/dp/1119060818/ref=mt_paperback?_encoding=UTF8&me=&qid=)

Companion YouTube Site: <https://www.youtube.com/channel/UCKSB1-LQsSfsRp24Q9W2Jlw/videos>

The Foundations for Community Health Workers is a textbook that is often used in community college courses. It contains readings, discussions and activities related to each Core Competency. The free companion YouTube site contains dozens of interviews, role plays, and demonstrations which can be used to spark discussions and conversations.

### **Texas Department of State Health Services**

Website: <https://www.dshs.texas.gov/mch/chw/chw-Instructor-Training-Sites.aspx>

Shareable CHW and Instructor Curriculum (October 2019): <file:///C:/Users/kmtucker/Downloads/CHW-Shareable-Curriculum-List.pdf>

The Texas Department of State Health Services publishes a list of CHW training programs in Texas that have agreed to share their curriculum. These curriculum have been approved as Continuing Education Units for CHW certification in Texas. The list is updated quarterly and the link is available on the website. The list of shareable curriculum includes general training (see Section 6 “other”) which includes sessions that are aligned with the CHW Core Competencies, as well as disease-specific trainings in a variety of other topic areas.

# APPENDIX E: POPULAR EDUCATION AND ADULT EDUCATION METHODS

Popular education is a people-oriented approach to education. It is characterized by active and participatory learning activities that value the learners' experience. Here are a few resources to help you learn more about popular education methods:

- [Popular education](#) by intergroup resources. Includes a brief introduction and links to resources.
- [An Introduction to Popular Education](#) by the Community Capacity Center. Uses popular education techniques to describe popular education.
- [Theory, Foundations and Key Concepts in Popular Education](#), Tufts University.

## Principles of Adult Education.

When designing a CHW training program, organizations should ensure that the sessions follow Adult Learning Principles. Adults learn best when information is relevant, problem-centered, acknowledges their experience, motivating and problem-centered. Here are some resources to help you learn more about adult education principles:

- [5 principles in adult education](#)
- [Principles of Adult Learning](#), prepared by Steven Shorlin
- [A simple, easy-to-understand guide to andragogy \(adult learning\)](#)