



AzCHOW
Arizona Community Health Workers Association

ARIZONA COMMUNITY HEALTH WORKERS ASSOCIATION

info@azchow.org

<http://www.azchow.org/>

AzCHOW CHW Training Program Approval Guidelines

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This document outlines the requirements and process for CHW Training Program approval through the Arizona Community Health Worker Association (AzCHOW). Programs that receive training program approval are eligible for CHW Voluntary Certification through the Arizona Department of Health Services (ADHS). Training programs that wish to apply for program approval through AzCHOW should read these guidelines carefully.

Contact and Application Information

Please direct questions to:

info@azchow.org

<http://www.azchow.org/contact-us/>

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Acronyms and Abbreviations

AzCHOW: Arizona Community Health Workers Association

ADHS: Arizona Department of Health Services

AzPHA: Arizona Public Health Association

AzPRC: Arizona Prevention Research Center, a CDC-funded research center at the University of Arizona Mel and Enid Zuckerman College of Public Health

C3 Project: Community Health Worker Core Consensus Project based at the University of Texas Houston, which produced recommendations for CHW Scope of Practice and Core Competencies.

CHW: Community Health Worker, a frontline public health worker with a close relationship to the community served. CHW is a blanket term that encompasses many different health worker titles, including CHRs and *promotor/as*.

CHR: Community Health Representative, a community-based health outreach worker in Native American and Alaska Native communities.

Promotor/a de Salud: Health Promoter, a community-based health outreach worker in Latino/Hispanic communities.

What is a Community Health Worker?

The Arizona Community Health Worker Association (AzCHOW) and Arizona Public Health Association (AzPHA) have adopted the American Public Health Association definition of a Community Health Worker: “A community health worker is 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/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.” (APHA, 2017)

The professional term Community Health Worker encompasses those who work in a variety of organizations and communities in Arizona. CHWs may work under a variety of different job titles, including *promotor/a*, Community Health Representatives, Community Health Advisors, Peer Support Specialists, Health Navigators and Community Outreach workers, among others. All these job titles are united under the “umbrella” of Community Health Workers because they share common core competencies and skills. For the purposes of this application and the training program approval process, the term “Community Health Workers” is inclusive of all individuals that work in the capacities outlined by the American Public Health Association definition of a CHW, regardless of job title.

CHW Core Competencies and Scope of Practice

Community Health Workers work in a variety of different organizations in different capacities. The Scope of Practice outlines the capacities in which a CHW can work in an organization. The Core Competencies are based on the Scope of Practice and ensure that a CHW has the training to carry out his or her responsibilities.

AzCHOW, the CHW Workforce Coalition and the AzPHA adopted the roles and scope of practice outlined in the C3 Project, which include the following:

- Cultural mediation among individuals, communities and social service systems
- Provide culturally appropriate health education and information
- Care coordination, case management and system navigation
- Provide coaching and social support
- Advocate for individuals and communities
- Build individual and community capacity.
- Provide direct service
- Implement individual and community assessment
- Participate in evaluation and research

The Community Health Worker Workforce Coalition, a collaboration of community-based organizations, clinics, universities, and government organizations, has adapted the 10 Core Competencies outlined in the Progress Report of the Community Health Worker Core Consensus (C3) Project in 2016 (Rosenthal, Rush & Allen, 2016). The 10 Core Competences of a CHW in Arizona as well as the skills associated with each competency are outlined in Table 1:

Table 1: CHW Core Competencies and Associated Skills

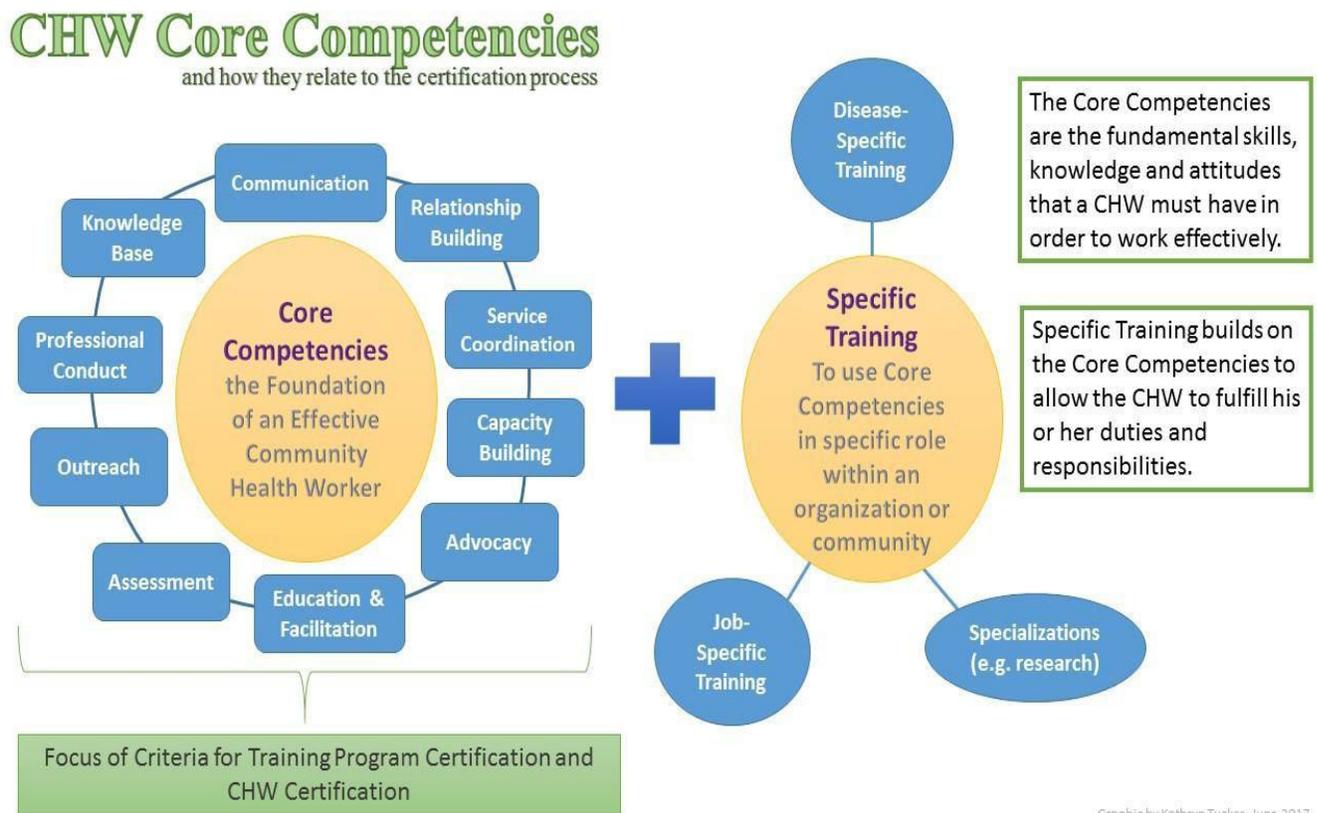
<i>Core Competency</i>	<i>Associated Skills</i>
Communication	Using language confidently
	Using language in ways that engage and motivate
	Communicating using plain and clear language
	Communicating with empathy
	Listening actively
	Preparing written communication including electronic communication
	Documenting work
	Communicating with the community served
Relationship Building	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

Service Coordination	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
Capacity Building	Helping others to identify goals and develop to their fullest potential
	Working in ways that increase individual and community empowerment
	Networking, building community connections, and building coalitions
	Teaching self-advocacy skills
	Conducting community organizing
Advocacy	Contributing to policy development
	Advocating for policy change
	Speaking up for individuals and communities
Education and Facilitation	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
Assessment	Participating in individual assessment through observation and active inquiry
	Participating in community assessment through observation and active inquiry
Outreach	Conducting case-finding, recruitment and follow-up
	Preparing and disseminating materials
	Building and maintaining a current resource inventory
Professional Conduct	Setting goals and developing and following a work plan
	Balancing priorities and managing time
	Applying critical thinking techniques and problem-solving
	Using pertinent technology
	Pursuing continued education and lifelong learning opportunities
	Maximizing personal safety while working in community and/or clinical setting
	Observing ethical and legal standards (e.g. CHW Code of Ethics, Americans with Disabilities Act (ADA), Health Insurance Portability and Accountability Act (HIPAA))
	Identifying situations for mandatory reporting and carry out reporting requirements
	Participating in professional development of peer CHWs and in CHW networking groups
	Setting boundaries and practicing self-care
	Knowledge Base
Pertinent health issues	
Healthy lifestyles and self-care	

	Mental/behavioral health issues and their connection to physical health
	Health behavior theories
	Basic public health principles
	Community served
	United States health and social service systems

The core competencies outline the core skills and abilities that all Community Health Workers must have to effectively fulfill their scope of practice. The core competencies will be complemented by other training, such as disease-specific management and care, which builds upon the core competencies of a CHW so that he or she can effectively fulfill his or her specific role in an organization or community.

Figure 1: CHW Core Competencies and Specific Training



This AzCHOW training program approval process, which has been endorsed by the Arizona CHW Workforce Coalition and supported by the Arizona Department of Health Services, focuses on the CHW core competencies with the acknowledgement that further training will occur depending on the specific duties and role of the CHW in an organization.

History of CHW Voluntary Certification in Arizona

The goal of CHW Voluntary Certification in Arizona is to facilitate the development of a strong and competent workforce. CHWs serve a vital role in health care linkage, patient advocacy and cultural mediation of health services. The increased recognition of the CHW workforce through voluntary certification will allow CHWs to work to their full capacity as vital members of the health care and social service sectors.

The Arizona Community Health Workers Association (AzCHOW) is a statewide professional organization representing CHWs. AzCHOW provides an opportunity for CHWs to speak with a collective voice and has been advocating for the work of CHWs in Arizona since 2001. AzCHOW has worked to unify the diverse groups within the CHW workforce, including *promotor/as* who work primarily with Hispanic/Latino communities, and Community Health Representatives who work in 22 Native American reservations across Arizona.

AzCHOW worked with many allies in Arizona to build the CHW voluntary certification process. In 2013, AzCHOW and the Arizona Prevention Research Center (AzPRC) at the University of Arizona convened the CHW Workforce Coalition. The first meeting included about 20 individuals in Tucson, Arizona. Currently, the Coalition has grown to include over 200 academic, public health, health care, tribal and nonprofit organizations.

In June 2014, the Arizona Department of Health Services hired a CHW Program manager in the Bureau of Tobacco and Chronic Disease. The Coalition grew with increasing participation from universities, health centers, nonprofit organizations, and other networks of CHWs, *promotores* and CHRs across the state.

The Coalition recognized the need for increased workforce development and recognition and prioritized the development of a voluntary certification process in Arizona. In 2016, the Coalition introduced legislation in the Arizona State Legislature to establish a CHW Certification Board. The original legislation did not pass out of the state legislature.

In 2018, the Coalition worked with legislative allies to introduce legislation to create Voluntary Certification for Community Health Workers in Arizona. The bill passed and was signed into law by Governor Doug Ducey in May 2018. The bill established a CHW Advisory Council to make recommendations for the rules for CHW voluntary certification through the Arizona Department of Health Services (ADHS). Finalization of the rules is set to happen in the Fall of 2022.

Benefits of Training Program Approval

The AzCHOW Training Program Approval process represents a collaborative effort between AzCHOW, ADHS and the CHW Workforce Coalition to ensure that CHW training programs provide CHWs with comprehensive training in core competencies. Approved programs have completed a rigorous application and assessment process and have demonstrated that they provide high quality training, skills development, and community experience that prepare CHWs to work to the fullest extent of their

competencies.

Organizations approved by AzCHOW are accepted by ADHS as approved training programs for the purposes of CHW Voluntary Certification, as the process ensures that all approved programs are based in the core competencies and will meet the minimum training requirements for certified CHWs and trainers.

Training program approval and Voluntary Certification includes benefits for CHWs, CHW clients, CHW employers, and the health system as a whole.

Benefits for CHWs
<ul style="list-style-type: none">● CHWs who complete an approved training program can apply to obtain Voluntary Certification through ADHS with 480 experience hours, including the community hours obtained during the training program● Increased professional recognition among hundreds of agencies and organizations within Arizona.● Increased opportunities for funding sustainability, including the potential for reimbursement through insurance companies.● Ability to advocate for themselves and their profession within an organization.● High quality and recognized training that will allow CHWs to gain employment in a variety of organizations and projects.
Benefits for CHW Clients
<ul style="list-style-type: none">● Knowledge that the CHW has standardized knowledge and training for better care.● Knowledge that certified CHWs must abide by a Code of Ethics which will support a trustworthy and respectful relationship.● Cost saving and better health outcomes.
Benefits for Communities Served by CHWs
<ul style="list-style-type: none">● Increased funding and recognition of CHWs can support more projects that help communities link to social services and improve the social determinants of health.
Benefits for CHW Employers

<ul style="list-style-type: none">● Knowledge that the CHW has knowledge and training for increased job performance and effectiveness.● Increased opportunities for CHW project sustainability and funding.● Ability to provide better care and support for patients and clients.● Increased understanding of the roles and competencies of a CHW, which will allow a CHW to work to his or her fullest potential in an organization.● CHWs who complete an approved training program can obtain voluntary certification through ADHS with 480 experience hours, including the community hours obtained in training

Benefits for Health System as a Whole

- Improve social determinants of health for vulnerable populations.
- Research has shown that CHWs improve health outcomes and reduce healthcare costs.

Training Program Approval Process

The training program approval process is designed to ensure that CHW training programs are based on the 10 Core Competencies, equip CHWs with the skills and knowledge to work in a variety of areas, and prepare CHWs to express their professional identity and unique competencies. Although the training program may include organization-specific training materials, training programs will need to prepare CHWs for a variety of positions in different environments beyond any single organization or project.

The training program approval process is also assessing the entire training program, not just the specific content or curriculum used to train CHWs. This means that the review committee is assessing the capability of an organization to implement the training program, including the qualifications of the trainers and the quality of the field experience or internship. CHW Training Program Approval Application

The Training Program Approval Application is a mechanism for approval of Community Health Worker (CHW) Training Programs. This application can be submitted by any agency or institution that offers a CHW Training Program. A wide variety of organizations have been approved through this process, including health departments, community colleges, nonprofit organizations, and clinics.

AzCHOW maintains a list of approved programs, which can be found on the AzCHOW website: <https://azchow.org/approved-az-chw-training>.

Technical Assistance

Before the application is submitted, technical assistance is available from the Arizona Prevention Research Center. **Organizations are strongly encouraged to take advantage of this technical support to ensure that they understand the application components and have the information necessary to complete their application materials correctly.**

Your submitted application materials will be reviewed by a non-committee member, who may indicate missing or incomplete materials or make recommendations to strengthen the application before it is sent to the review committee. This technical review does not guarantee later approval from the Review Committee, but is designed to ensure that the applications are complete and ready for assessment.

If the application is incomplete or additional information is required for the review committee to complete their initial assessment, the application may be delayed.

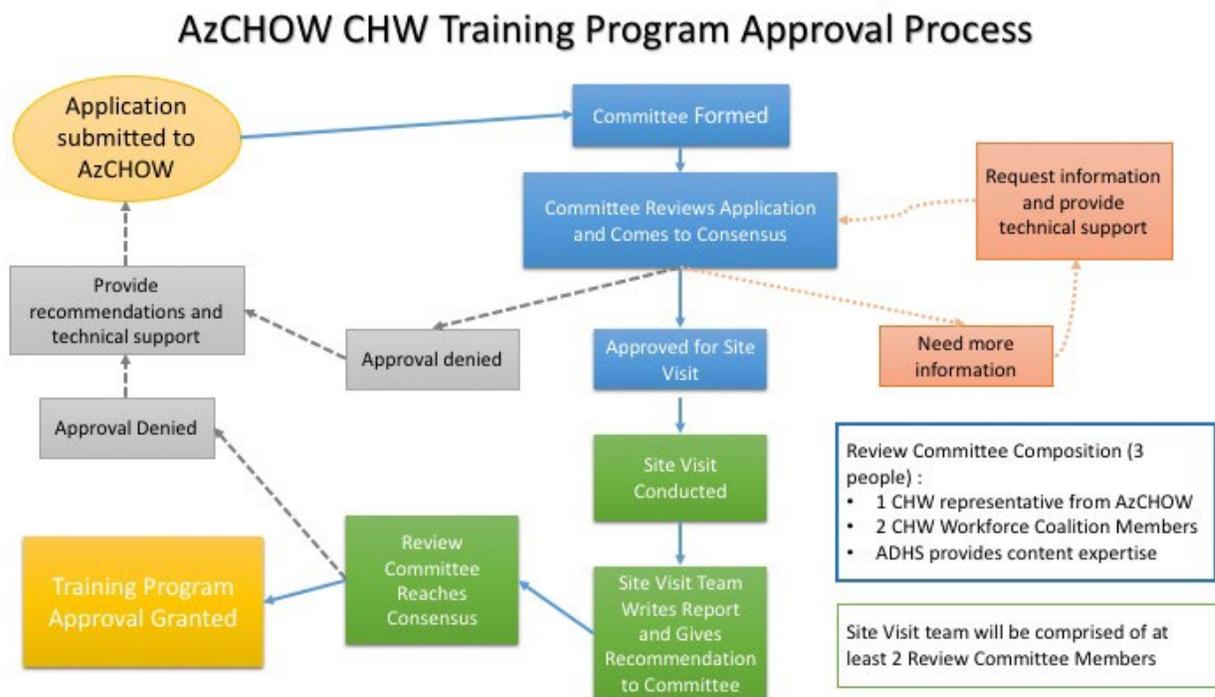
Please email Kathryn Tucker Ortiz y Pino at kmtucker@arizona.edu for additional information about technical assistance.

Application Process and Timeline

The Training Program Approval Review has two components: 1) a detailed application outlining the program and how it prepares CHWs in the core competencies, and 2) a site visit to discuss the training program and provide opportunities for technical assistance.

On average, the Training Program Review process is completed within three months of the application submission. The process may take longer if the application materials are incomplete, the review committee requests additional information, if scheduling issues arise for the review committee or organization, or if several programs are applying simultaneously.

The training program approval process is outlined in the following flowchart:



The Arizona Prevention Research Center is responsible for coordinating the application process in addition to providing technical assistance. AzPRC staff serves as the main contact for the applicant organization and helps to organize the committee. Once the application is submitted to AzCHOW, a training program review committee will be formed.

The review committee is comprised of 3 individuals: 1 CHW representative from AzCHOW and 2 representatives from the CHW Workforce Coalition with extensive experience with the CHW workforce. A representative from ADHS will be invited to provide support as a content expert during the review process.

Written Application Review

Once formed, the Training Program Review Committee will review the documents submitted with the site's application. Each committee member reviews the documents individually and fills out the Application Review Scoring Sheet, which can be found in Appendix B. The review committee meets to discuss each statement, come to a consensus about their scores and make a decision about the application materials.

If the written application is approved, the site will be notified and begin to plan for the site visit.

If more information or clarification is needed, the committee will notify the site and work with them to answer any questions. Sometimes, applicants are asked to address the committee's concerns and questions in a document supplemental to the original application. Applicants may need to edit and resubmit the original application. Applicants should be prepared for requested revisions and ensure that a program representative is available to answer questions promptly.

If the application is denied, the Committee will inform the site and provide a reason for denial. If denied, the Committee will offer the site ongoing technical support, and the site will have up to a year from the date of the denial notification to re-submit the application without having to pay the \$500 application fee again. The Application Review should be completed within 45 days of application submission.

Site Visit

Once the application is approved, the training program will prepare for the site visit. The Training Program Review Committee will choose 2-3 of its members (including at least 1 CHW) to conduct the site visit, which should take around 4 hours. During the site visit, the Site Visit Committee will meet with program leadership, trainers/instructors, current and former students, and community experience/internship coordinators. The purpose of the site visit is twofold: to evaluate the site and ensure that there is a strong understanding of and commitment to the Core Competencies of a CHW, and to open a dialogue, build relationships and provide technical support to the site. The site visit should be scheduled within one month of the Application Review decision.

Within two weeks of the site visit, the Site Visit Committee will compare findings and provide recommendations to the entire Training Program Review Committee. At this point, the Training Program Review Committee will make its final decision and communicate that decision to the site.

There are three potential decisions that the review committee will make: approved, approved with contingency, or denied. Once a training program is approved, it will be valid for five years from the date of the approval.

In some cases, the training program will be approved with contingency. This means that the review committee requires additional information or documentation before final approval can be granted. In that case, the review committee will outline the additional requirements and provide a clear timeline for the revisions or additional information to be submitted. Once that information is submitted for review, the committee will finalize their decision.

If the site is not approved, the Committee will inform the site a detailed report of the required changes for the application. The site will have up to year from the time of the notification to re-submit the application free of charge. An organization can re-submit an application for no additional fee up to twice in a year (three total application submissions) without repayment. After one year, the site will have to pay an additional \$500 application fee. Technical assistance is available to sites who are not granted approval.

The training program approval will be valid for 5 years, after which time the training program will need to complete the training program approval process again.

Training Program Approval Application Components

The Training Program Application is composed of three parts: Program Description and Background, Supporting Documents, and Core Competency Checklist.

Program Description and Background:

In this section of the application, the site will provide basic background information on the agency/institution, including type of agency/institution, a history of the agency/institution, the classroom and community experience hours provided by the agency/institution, and a brief description of the community experience/internship component of the training program.

The site should provide as much detail as possible about the background, development, and implementation of the CHW training program. Specifically, the site should ensure that their response includes the following as applicable:

- How long the CHW training program has been in place
- How many CHWs have been trained in the program to date, and an estimate of how many CHWs will be trained annually for the next five years.
- Current funding supports for the CHW training program, and the sustainability of those funding supports
- The qualifications of the people implementing the trainings and their specific experience as CHWs...?
- How the training program fits in to the overall mission and goals of the organization, as well as the specific department in which the training is housed.
- How the training program is implemented, including: who is eligible to be trained in the program, how CHW trainees are chosen or recruited, how often the training program is implemented, and how trainers and coordinators are chosen for the program,
- A clear description of the community experience/internship component of the program, including partnerships with external organizations as applicable, and how CHW trainees are

connected to their community experience/internship.

Supporting Documentation

The following materials should be submitted as separate word documents with the Training Program Approval Application:

Table 1: Required Supplemental Materials for the CHW Training Program Approval Application

Training Schedule/Syllabus	This attachment should provide information about the order of the training sessions. This schedule should include the title, number of hours, and instructor name for each session.
Session Descriptions	<p>This attachment should include a description of each course or training session, including the specific topics and activities covered in each session and the learning objectives. The learning objectives describe the knowledge and skills that the student should have after the session (example below). This should include the community experience/internship component.</p> <p><i>Learning Objectives Examples:</i> <i>The CHW student will demonstrate appropriate strategies for learner-centered education. Related Core Competency: Education and Facilitation</i> <i>The CHW student will understand the most important health issues that face the population she or he will serve. Core Competency: Knowledge Base</i></p> <p>Training programs are encouraged to incorporate the core competencies into the session descriptions. For example, the description can clearly state which core competencies are primarily addressed in the session, or the applicant provide a table mapping competencies to each training activity. The training program should also consider weaving the core competencies into the session content so that they are continuous reinforced for CHW trainees.</p>
CHW Learning Evaluation Process	<p>Include a description of how CHWs are evaluated to show their knowledge and competencies. Describe the requirements that the CHW must meet to complete the training program, and how the CHW demonstrates that they meet these requirements.</p> <p>The evaluation methods should include information about the specific methods that the trainers use to evaluate the learning and skills of CHW trainees during their training program (e.g. role plays, case study discussion, knowledge checks, observations, pre/post tests) We encourage evaluation methods that are discussion and activity based, rather than only exam based. It should also clearly indicate how the CHW trainees and program coordinators determine whether the CHW trainee is prepared to advance in the program or complete the program. Describe any continued evaluation plans, for example how CHWs are assessed on a regular basis once they complete the training program, as applicable.</p>
Trainer/Instructor Training and Experience	Provide information about the training and experience of the program instructors, focusing on their experience with and knowledge of

	<p>CHWs. This can include a brief description of relevant experience in a resume or CV format, along with a description of the trainers experience with the CHW workforce, including trainings or involvement with CHW stakeholder groups as applicable. Please indicate which classes/sessions are taught by each instructor. Programs are encouraged to have at least one trainer/instructor with experience as a CHW.</p>
<p>Program Director/Coordinator training and experience</p>	<p>Provide information in a resume or CV format outlining the qualifications and experience of the program director to work with CHWs. This can include a resume/CV as well as a description of the individual's experience with the CHW workforce, including trainings or involvement with CHW stakeholder groups, as applicable.</p>
<p>CHW training and hours tracking methods</p>	<p>Provide information about how the program tracks the progress of the CHW trainees as they progress through the program. The requirements and progression of the training should be clearly delineated for both the CHW trainee and the training program staff/instructors. This could include a checklist of required trainings, documentation of an online learning management system, or completion of shadowing or mentorship forms, for example.</p> <p>This tracking form should include a clear way for the training site and the CHW to track the hours of training completed and the hours of experience that the CHW has completed in each core competency. The CHW voluntary certification process will require CHWs to document their experience in the core competencies.</p>
<p>Training Program Sustainability</p>	<p>Describe the plans for the training program to continue with a high level of quality and fidelity to the submitted materials. The plan for sustainability will differ according to the training program's circumstances, but the following suggestions could be included:</p> <ul style="list-style-type: none"> • Acknowledgement of leadership support and commitment to continue the training program during the five-year approval period. • How the training program is and will continue to be funded in the future, especially if the program includes support from grant funding. • The plan to deal with potential turnover for program staff, especially trainers and coordinators. How will the training program ensure that new hires in these supervisory positions have the skills and knowledge to continue to implement the training program, and have a strong understanding of the core competencies? This could include required trainings or qualifications for new applicants. How will new directors/coordinators receive training/onboarding to be able to take over the training program? • Plans the organization has to expand or change the CHW program during the five years of the training program approval period.

Training and Core Competency Checklist, a required component of the CHW Training Program Approval Application

The training and Core Competency checklist ensures that the training prepares a CHW for voluntary certification, connects the trainees to the wider CHW workforce, covers at least 90% (53 out of 59) of the Core Competency skills and knowledge. The site will have to indicate which session includes content on each of the Core Competencies.

The checklist is included in Appendix A.

Site Visit Guidelines

The site visit will take place after the Training Program Application has been completed and approved. The site visit will be completed by a smaller group within the Training Program Review Committee, consisting of 2-3 Committee members, one of which will be a CHW.

The program coordinator/director will work with the Application Point Person to schedule the site visit, which should take around four hours. During the Site Visit, the Site Visit Committee should meet with the following representatives of the CHW Training Program:

- Program Director/Coordinator. The Program Director/Coordinator is the individual who is directly responsible for the training program, including facilitating the community experience/internship component.
- A small group of current and former students (3-5 students)
- Program Trainers/Instructors. The number of trainers/instructors will vary by program, but this meeting should include a sample of trainers and instructors that teach a variety of sessions
- Community Experience/Internship Coordinators. The community experience/internship coordinators supervise the CHW students in the practical field work part of the training program. The community experience/internship coordinators may be from within the organization, or they may be from partner organizations. If there are several partner organizations, this meeting should include at least 2 of them.
- Agency/Institution Leadership. The agency/institution leadership should include individuals that have a leadership role in the organization and supervises the program director/coordinator. For example, the dean of an academic program, CEO or Executive Director of a small organization, or other executive position.

In some instances, one person may have several of these roles (for example, the program director/coordinator may also be a trainer/instructor). In this case, the individual might be included in several meetings, or the interview with them might be longer to accommodate the additional questions that will be asked of the individual.

If the site visit occurs in person, the Program Coordinator/Director should also plan to tour the facilities with the Site Review Committee. The Site Review Committee may also request additional meetings or activities.

The organization's Training Program Coordinator/Director is responsible for organizing these meetings during the 4-hour visit window and ensuring that the site visit committee meets with all required representatives. The first meeting should be with the program coordinator/director, and at least 45

minutes should be allocated to that meeting so that the review committee can clarify additional questions from the application materials. The other meetings can be allotted 30-45 minutes depending on the size of the group. For example, if there will be more than three representatives from the organization, a longer amount of time should be allocated so that the site visit committee can hear from everyone.

One of the major purposes of the site visit is to open the lines of communication between the training program under review, AzCHOW representatives, ADHS and other CHW Workforce Coalition members. The site should be prepared with questions or requests for technical assistance.

The Site Visit Committee will use the Site Visit Evaluation Instrument to evaluate the site and guide their conversations with the site representatives during the site visit. The Site Visit Evaluation Instrument contains questions and an evaluation tool that each individual Site Visit Committee member will fill out throughout the Site Visit. The Evaluation Instrument contains Likert Scale Statements such as the following:

	Strongly Disagree 0	Disagree 1	Neutral 2	Agree 3	Strongly Agree 4
The Current and Former Students have a strong understanding of the CHW Core Competencies					

The full site visit evaluation instrument can be found in Appendix C.

The Site Visit Review Committee will fill out the Evaluation Instrument based on their meetings during the Site Visit. Each statement has a numerical value that the Committee Member will use to create an average that can be compared by different Site Visit Review Committee members.

After the site visit, the Site Visit Committee will review the Site Visit Evaluation Instruments and report their findings to the Program Review Committee. The Program Review Committee will reach consensus and provide its determination to AzCHOW. AzCHOW will inform the site of their decision within two weeks of the site visit. If the Training Program Approval Application is denied, the site will be offered technical support, and the site will have up to a year from the date of denial to re-schedule a site visit without paying the \$500 fee again.

Training Program Approval Expiration

The Training Program Approval Certificate is valid for five years from the month of initial full approval. For example, if a site was approved in April 2020, the approval is valid until April of 2025. To renew the training program approval, the site must become reapproved by completing the entire application process. It is recommended that the site submit the application materials at least three months before the expiration date to avoid a lapse in approval. Technical assistance is available to sites seeking to apply for renewal of training program approval.

References

American Public Health Association, 2017. "Community Health Workers." Retrieved May 5, 2017 from <https://www.apha.org/apha-communities/member-sections/community-health-workers> .

Rosenthal, E.L., Rush, C.H. & Allen, C.G. (2016). Understanding Scope and Competencies: A Contemporary Look at the United States Community Health Worker Field. Progress Report of the CHW Core Consensus (C3) Project: Building National Consensus on CHW Core Roles, Skills and Qualities. Retrieved June 28, 2017 from <https://sph.uth.edu/dotAsset/28044e61-fb10-41a2-bf3b-07efa4fe56ae.pdf>

Appendix A: Training and Core Competency Checklist

CHW Training Checklist

An approved training program should include the following components. Please use the table below to indicate in which part of the curriculum each of the following topics is discussed. Please note that technical assistance and resources are available to help you incorporate these topics into your training program. Please contact AzCHOW for more information.

<i>The CHW training program must include content on:</i>	<i>Indicate the session(s) or class(es) where this content is included.</i>
The history of the CHW workforce in Arizona	
An overview of the CHW profession, including the diverse job titles and responsibilities that encompass the workforce	
An overview of the CHW core competencies including examples of each one.	
An orientation to voluntary certification, including the requirements and process for obtaining certification.	

Core Competency 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	
Relationship-Building	
<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	
Service Coordination	
<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	
Capacity Building	
<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	
Working in ways that increase individual and community empowerment	
Networking, building community connections, and building coalitions	
Teaching self-advocacy skills	
Conducting community organizing	
Advocacy	
<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	
Education and Facilitation	
<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	
Assessment	
<i>The CHW training program must include content on:</i>	<i>Indicate the session(s) or class(es) where this content is included</i>
Participating in individual assessment through observation and active inquiry	
Participating in community assessment through observation and active inquiry	
Outreach	
<i>The CHW training program must include content on:</i>	<i>Indicate the session(s) or class(es) where this content is included</i>
Conducting case-finding, recruitment and follow-up	
Preparing and disseminating materials	
Building and maintaining a current resource inventory	
Professional Conduct	
<i>The CHW training program must include content on:</i>	<i>Indicate the session(s) or class(es) where this content is included</i>
Setting goals and developing and following a work plan	
Balancing priorities and managing time	
Applying critical thinking techniques and problem-solving	
Using pertinent technology	
Pursuing continued education and lifelong learning opportunities	
Maximizing personal safety while working in community and/or clinical setting	
Observing ethical and legal standards (e.g. CHW Code of Ethics, Americans with Disabilities Act (ADA), Health Insurance Portability and Accountability Act (HIPAA))	
Identifying situations for mandatory reporting and carry out reporting requirements	
Participating in professional development of peer CHWs and in CHW networking groups	
Setting boundaries and practicing self-care	
Knowledge Base	
<i>The CHW training program must include content on:</i>	<i>Indicate the session(s) or class(es)</i>

	<i>where this content is included</i>
Social determinants of health and related disparities	
Pertinent health issues	
Healthy lifestyles and self-care	
Mental/behavioral health issues and their connection to physical health	
Health behavior theories	
Basic public health principles	
Community served	
United States health and social service systems	

Appendix B: Application Review Scoring Sheet

APPLICATION REVIEW SCORING SHEET

Training Program Review Committee

Instructions: Each of the Training Program Review Committee members should fill out Section 1 and Section 2 of the following instrument based on the information provided in the Training Program Certification Application. After reviewing the application individually, the Training Program Review Committee will meet to discuss the information in this scoring sheet and come to consensus (Section 3).



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Before beginning this Scoring Sheet, read through the Core Competencies and Training Program Certification Guidelines.

Section 1: Program Description and Supporting Documents

Review the Program Description Section and the Supporting Documents of the Application and answer the following questions. Please review the Rubric for Training Program Review Committee Assessment and relevant sections of the Training Program Certification Guidelines in order to understand how to evaluate each of the following statements below.

Statement	Strong Disagree 0	Disagree 1	Neutral 2	Agree 3	Strongly Agree 4
The syllabus/training schedule includes an appropriate progression of training sessions.					
The session content (learning objectives) is appropriate for a CHW training program.					
The delivery of activities in the					

training schedule/syllabus is appropriate for skill development related to CHW work.					
The Community Experience/Internship component will provide the CHW student with adequate and realistic opportunity to learn about the work of a CHW					
The evaluation methods are appropriate for assessing the skills and knowledge necessary for work as a CHW.					
The trainers/instructors have adequate experience with CHWs					

Were you unable to answer any of the questions above due to missing, incomplete or unclear information in the Training Program Certification Application? If so, what further information do you need?

What further questions do you have after reviewing the information above?

Section 2: Core Competency Checklist

Instructions: Use the Core Competency Checklist and supporting documentation to verify that each of the sub-skills in the Curricula Scoring Matrix is included in the training program.

Communication	
The CHW training program must include content on:	The supporting documentation indicates that this information is included (Yes/No)
<i>Using language confidently</i>	
<i>Using language in ways that engage and motivate</i>	
<i>Communicating using plain and clear language</i>	
<i>Communicating with empathy</i>	
<i>Listening actively</i>	
<i>Preparing written communication including electronic communication</i>	
<i>Documenting work</i>	
<i>Communicating with the community served</i>	
<i>Comments/questions on Communication Core Competency:</i>	
Relationship-Building	
The CHW training program must include content on:	The supporting documentation indicates that this information is included (Yes/No)
<i>Providing coaching and social support</i>	

<i>Conducting self-management coaching</i>	
<i>Using interviewing techniques (e.g. motivational interviewing)</i>	
<i>Working as a team member</i>	
<i>Managing conflict</i>	
<i>Practicing cultural humility</i>	
<i>Understanding the culture of institutions</i>	
<i>Comments/questions on Relationship-Building Core Competency:</i>	
Service Coordination	
The CHW training program must include content on:	The supporting documentation indicates that this information is included (Yes/No)
<i>Coordinating care (includes identifying and accessing resources and overcoming barriers)</i>	
<i>Making appropriate referrals</i>	
<i>Facilitating the development of an individual and/or group action plan and goal attainment</i>	
<i>Coordinating CHW activities with clinical and community services</i>	
<i>Follow-up and tracking care and referral outcomes</i>	

Comments/questions on Service Coordination Core Competency

Capacity Building

The CHW training program must include content on:

The supporting documentation indicates that this information is included (Yes/No)

Helping others to identify goals and develop to their fullest potential

Working in ways that increase individual and community empowerment

Networking, building community connections, and building coalitions

Teaching self-advocacy skills

Conducting community organizing

Questions/Comments on Capacity Building Core Competency:

Advocacy

The CHW training program must include content on:

The supporting documentation indicates that this information is included (Yes/No)

Contributing to policy development

Advocating for policy change

<i>Speaking up for individuals and communities</i>	
<i>Questions/Comments on Advocacy Core Competency:</i>	
<u>Education and Facilitation</u>	
The CHW training program must include content on:	The supporting documentation indicates that this information is included (Yes/No)
<i>Using empowering and learner-centered teaching techniques</i>	
<i>Using a range of appropriate and effective educational techniques</i>	
<i>Facilitating group discussions and decision-making</i>	
<i>Planning and conduct classes and presentations for a variety of groups</i>	
<i>Seeking out appropriate information and responding to questions about pertinent topics</i>	
<i>Finding and sharing requested information</i>	
<i>Collaborating with other educators</i>	
<i>Collecting and using information from and with community members</i>	
<i>Questions/comments on education and facilitation core competency:</i>	

<u>Assessment</u>	
The CHW training program must include content on:	The supporting documentation indicates that this information is included (Yes/No)
<i>Participating in individual assessment through observation and active inquiry</i>	
<i>Participating in community assessment through observation and active inquiry</i>	
<i>Questions/comments on Assessment Core Competency:</i>	
<u>Outreach</u>	
The CHW training program must include content on:	The supporting documentation indicates that this information is included (Yes/No)
<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>Questions/Comments on Outreach Core Competency:</i>	
<u>Professional Conduct</u>	

The CHW training program must include content on:	The supporting documentation indicates that this information is included (Yes/No)
<i>Setting goals and developing and following a work plan</i>	
<i>Balancing priorities and managing time</i>	
<i>Applying critical thinking techniques and problem-solving</i>	
<i>Using pertinent technology</i>	
<i>Pursuing continued education and lifelong learning opportunities</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>	
<i>Questions/Comments on Professional Conduct Core Competency:</i>	
<u>Knowledge Base</u>	

The CHW training program must include content on:	The supporting documentation indicates that this informatio is included (Yes/No)
<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>	
<i>Questions/Comments on Knowledge Base Core Competency:</i>	

Were you unable to assess any of the above Core Competencies due to missing, incomplete or unclear information in the Training Program Certification Application? If so, what further information do you need?

Are at least 90% (53 out of 59) of the Core Competencies above covered in the training

schedule/syllabus?

YES

NO

What further questions do you have after reviewing the Core Competency Checklist?

Section 3: Training Program Review Committee Meeting

Instructions: After each individual on the Training Program Review Committee has completed Sections 1 and 2, the entire committee should meet by phone or in person to discuss their assessment. The Committee should discuss each component of the Application Review Scoring Sheet, particularly areas of disagreement.

The Committee should come to consensus on a decision:

- Application Complete and Move on to Site Visit: the Application includes all of the information needed and the Training Program Review Committee is satisfied that they can move on to the site visit.
- More information needed: information is needed or the Training Program Review Committee feels that more information is necessary to make a decision about the Site Visit.
- Application Denied: The training program does not meet the expectations required for certification. The training program review committee will provide feedback and technical assistance.

If the training program proceeds to site visit, the Training Program Review Committee must choose who will represent them on the Site Visit. The Site Visit Committee should be made up of 2-3 people from the Training Program Review Committee, at least one of whom should be a CHW. The Training Program Review Committee should compile questions that the Site Visit Committee should ask during the visit.

The Application Point Person should communicate the decision and other pertinent information to the Training Program Coordinator.

IF APPROVED FOR SITE VISIT:

What further questions should site visit review committee ask during the site visit?

IF MORE INFORMATION IS NEEDED:
What information is needed?

IF APPLICATION IS DENIED:
What are the reasons for denying the application.

Appendix C: Site Visit Evaluation Instrument



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AzCHOW Training Program Review Site Visit Evaluation Instrument

Instructions: This evaluation instrument should be filled out during and immediately after the site visit by the Site Visit Committee. The site visit is the second and final step of the CHW Training Program Voluntary Certification Application.

Purpose: The purpose of the site visit is to:

- verify information on the training program review application
- confirm that the training program representatives have a strong understanding of the roles of CHWs and how best to educate them
- ensure that the practical experience component of the training program is appropriate for CHW work.

During the Site Visit, the Site Visit Committee should meet with the following representatives of the CHW Training Program:

- Current and Former Students
- Program Director/Coordinator
- Program Trainers/Instructors
- Community Experience Coordinators
- Agency/Institution Leadership

The following instrument outlines some of the questions and observations that should be conducted during each meeting. The Training Program Review Committee may also add additional questions and observations based on the information provided in the Training Program Certification Application.

Site Visit Committee Member Name: _____

Site: _____

Date: _____

PROGRAM REPRESENTATIVES	PROGRAM DIRECTOR/COORDINATOR
PURPOSE OF MEETING	Determine if the director/coordinator understands the role of CHWs and is committed to helping future CHWs fill these needs.
QUESTIONS	<ul style="list-style-type: none"> • What are the roles of a CHW? • How does this program promote and teach those roles? • How does this program incorporate the CHW Core Competencies into the courses/classes? • How does this program prepare CHWs for their future work? • What is your vision for this program?
Comments/Notes During Meeting:	

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After the meeting, mark the extent to which you agree with the following statements:

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
The Program Director/Coordinator has a strong understanding of the CHW Core Competencies					
The Program Director/Coordinator ensures that the CHW Core Competencies are appropriately integrated into the training program.					

Comments:

PROGRAM REPRESENTATIVES

PROGRAM TRAINERS/INSTRUCTORS

PURPOSE OF MEETING Determine if the instructors/trainers understand the core competencies of CHWs

QUESTIONS

- What are the roles and core competencies of a CHW?
- Do you incorporate information about the roles and core competencies of a CHW into your courses? How?
- Does the program coordinator/director support and guide the integration of the core competencies into the classes/sessions? If so, how?
- What methods do you use to teach the CHW students about the core competencies in your classes/sessions?
- Do you think that the students who complete this program have a strong understanding of the core competencies? Why or why not?

Comments/Notes During Meeting:

After the meeting, mark the extent to which you agree with the following statements:

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
The Instructor/Trainers have a strong understanding of the CHW Core Competencies					
The Instructor/Trainers effectively integrate the CHW Core Competencies into their classes/sessions					
The Instructors/Trainers use effective teaching strategies (i.e. popular education) to teach CHW students about the core competencies.					

Comments:

PROGRAM REPRESENTATIVES

CURRENT AND FORMER STUDENTS

PURPOSE OF MEETING Determine if the current and former students understand the roles and core competencies of CHWs.

- QUESTIONS**
- Can you describe your experience with the CHW training program?
 - Can you describe the practical community experience that you participated in during the program?
 - Did instructors/trainers and staff support you to learn the core competencies and roles of a CHW?
 - For those working now: how did the program prepare you to work as a CHW?

Comments/Notes During Meeting:

After the meeting, mark the extent to which you agree with the following statements:

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
The Current and Former Students have a strong understanding of the CHW Core Competencies					
The training program prepares students for careers as CHWs.					
The Current and Former Students report that the community experience/internship provide an appropriate environment for the CHW to learn about the roles and responsibilities of a CHW.					
The Current and Former Students report that the core competencies are integrated into all aspects of the training program.					
Comments:					

PROGRAM REPRESENTATIVES

COMMUNITY EXPERIENCE/INTERNSHIP COORDINATORS

PURPOSE OF MEETING

Do the Community Experience/Internship Coordinators understand the core competencies and provide appropriate experiential learning opportunities for CHW students?

QUESTIONS

- What are the roles and competencies of CHWs?
- What does this training program emphasize as the goals and objectives for a CHW student’s community experience?
- What should students get out of a practical community experience?
- How do you support CHWs in the practical experience?
- Do you incorporate information about the roles and core competencies of CHWs into the practical experience? How?

Comments/Notes During Meeting:

After the meeting, mark the extent to which you agree with the following statements:					
	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
The Community Experience/Internship Coordinators have a strong understanding of the CHW Core Competencies.					
The training program provides adequate information on CHW Core Competencies to the Community Experience/Internship Coordinators.					
The Community Experience/Internship provides an appropriate environment for the CHW to learn about the roles and responsibilities of a CHW.					
Comments:					

PROGRAM REPRESENTATIVES	AGENCY/INSTITUTIONAL LEADERSHIP
PURPOSE OF MEETING	Determine if there is strong support for the CHW program at the agency or institution.
QUESTIONS	<ul style="list-style-type: none"> • What is your vision for the CHW training program, now and in the future? • What support do you provide to the CHW training program (e.g. financial)? • What plans do you have for the CHW training program in the future?
Comments/Notes During Meeting:	

After the meeting, mark the extent to which you agree with the following statements:

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
The Agency/Institution Leadership provides adequate support for and recognition of the CHW training program.					
The Agency/Institution Leadership has a clear vision for the CHW training program					
Comments:					

Overall Assessment

After the site visit, mark the extent to which you agree with the following statements:

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
The training program emphasizes the CHW Core Competencies.					
The training program prepares students for a career as a CHW.					
The community experience/internship component of the training program provides an adequate opportunity for the CHW student to practice the Core Competencies					
Comments:					

