Community Health Worker Training Program Approval Evaluation Rubric

Section 1: Training Reviewer Information

Training Program Name:

Date of Review:

Name	Active Review	Observation/Public	Recused

Evaluation Score Scale:

1. **Response missing or does not address question**
2. **Response does not adequately meet standards**
3. **Response meets some but not enough of the standards to approve**
4. **Response adequately meets standards and can be approved with recommended changes**
5. **Response to question meets or exceeds standards**

Section 2: Training Program Principles and Practices

#	Topic	Description/Considerations	Score (0 5)	Comments/Recommendations
1.	CHW Instructors	3-5 years' experience working as CHW fulltime. Proof of completion of CHW Core Competency Training; preferred resident with knowledge of the community; Knowledge, skills and competence to effectively teach		
2.	Organization Overview and Prior Experience	Does the organization have a developed understanding of the CHW model and how to integrate the CHW training with their mission and teaching philosophy?		Does the organization have prior CHW training experience? Yes No
3.	Teaching Methodologies (popular education concepts, adult learning principles	Does the training program use a variety of teaching methodologies such as popular education concepts or adult learning principles?		
4.	Training formats (classroom, distance learning, small group)	Does the training program use a variety of formats to deliver training in a way that is tailored to the community, inclusive and accessible?		
5.	Evaluation/Feedback/Improvement	Does training program track student satisfaction and feedback to improve the program?		Required attachment: student feedback form Yes No
6.	Collaboration with CBOs	Does training program collaborate with community-based organizations?		Required attachment: Agreement and/or Letter of Support with local CBO Yes No
7.	Recruitment and Enrollment	Does training program use multiple recruiting efforts and enrollment of students?		Is there a fee? Yes No Unknown
8.	Communities of Focus	Does training program identify need for CHW in specific areas (geography, race, ethnicity, culture, language, socioeconomic status, ability status and shared life experiences		

9.	Equivalency	Does training program grant equivalency for students who have previously completed training through other organization?		
10.	Academic Credit	Will students receive academic credit?		Yes No Unknown
11.	Records and Attendance	Does the organization have a organized system of maintaining accurate records of graduation?		
12.	Final Assessment	Does the program have a method of assessing for the acquisition of knowledge and mastery of skills by its students with clear criteria for passing?		Required attachment: Sample exams, rubrics Yes No
13.	Criteria for Completion	Does the program have clear criteria, aside from the final exam, to determine whether students have successfully completed the program?		
	Total			
	Pass?		Yes/No	

Section 3: Roles and Sub-Roles

	Role	Sub-Roles Description	Score (0-5)	Comments/Recommendations
1	**Cultural Mediation among Individuals, Communities, and Health and Social Service Systems**	a. Educating individuals and communities about how to use health and social service systems (including understanding how systems operate) b. Educating systems about community perspectives and cultural norms (including supporting implementation of Culturally and Linguistically Appropriate Services [CLAS] standards) c. Building health literacy and cross-cultural communication		

2	**Providing Culturally Appropriate Health Education and Information**	a. Conducting health promotion and disease prevention education in a manner that matches linguistic, ~~and~~ cultural, and developmental needs of participants or community b. Providing necessary information to understand and prevent diseases and to help people manage health conditions (including chronic disease)		
3	**Care Coordination, Case Management, and System Navigation**	a. Participating in care coordination and/or case management b. Making referrals and providing follow-up c. Facilitating transportation to services and helping to address other barriers to services d. Documenting and tracking individual and population level data e. Informing people and systems about community assets and challenges f. Facilitating the participant-provider relationship and effective communication		
4	**Providing Coaching and Social Support**	a. Providing individual support and coaching b. Motivating and encouraging people to obtain care and other services c. Supporting self-management of disease prevention and management of health conditions (including chronic disease) d. Planning and/or leading support groups		
5	**Advocating for Individuals and Communities**	a. Advocating for the needs and perspectives of communities b. Connecting to resources and advocating for basic needs (e.g. food and housing) c. Conducting policy advocacy		
6	**Building Individual and Community**	a. Building individual capacity b. Building community capacity c. Training and building individual capacity with CHW peers and among groups of CHWs		

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7	**Providing Direct Service**	a. Providing basic screening ~~tests~~ (e.g., heights & weights, blood pressure) b. Providing basic services (e.g., first aid, diabetic foot checks) c. Meeting basic needs (e.g., direct provision of food and other resources) d. Conducting psychosocial screening		
8	**Implementing Individual and Community Assessments**	a. Participating in design, implementation, and interpretation of individual-level assessments (e.g. home environmental assessment) b. Participating in design, implementation, and interpretation of community-level assessments (e.g. windshield survey of community assets and challenges, community asset mapping)		
9	**Conducting Outreach**	a. Case-finding/recruitment of individuals, families, and community groups to services and systems b. Follow-up on health and social service encounters with individuals, families, and community groups c. Home visiting to provide education, assessment, and social support d. Presenting at local agencies and community events		

10	**Participating in Evaluation and Research**	a. Engaging in evaluating CHW services and programs
		b. Identifying and engaging community members as research partners, including community consent processes
		c. Participating in evaluation and research:
		   i) Identification of priority issues and evaluation/research questions
		   ii) Development of evaluation/research design and methods
		   iii) Data collection and interpretation
		   iv) Sharing results and findings
		   v) Engaging stakeholders to take action on findings		

Table 4. Skills and Sub-Skills

	Skill	Sub-Skills	Score (0-5)	Comments/Recommendations
1	**Communication Skills**	a. Ability to use language confidently b. Ability to use language in ways that engage and motivate c. Ability to communicate using plain and clear language d. Ability to communicate with empathy e. Ability to listen actively f. Ability to prepare written communication including electronic communication (e.g., email, telecommunication device for the deaf) g. Ability to document work h. Ability to communicate with the community served (may not be fluent in language of all communities served) i. Ability to negotiate and advocate on behalf of participants		
2	**Interpersonal and Relationship-Building Skills**	a. Ability to provide coaching and social support b. Ability to conduct self-management coaching c. Ability to use interviewing techniques (e.g. motivational interviewing) d. Ability to work as a team member e. Ability to manage conflict f. Ability to practice cultural humility		
3	**Service Coordination and Navigation Skills**	a) Ability to coordinate care (including identifying and accessing in a way that is person centered b) Ability to identify and access resources and overcome barriers c) Ability to make appropriate referrals d) Ability to facilitate development of an individual and/or group action plan and goal attainment e) Ability to coordinate CHW activities with clinical and other community services f) Ability to follow-up and track care and referral outcomes		

4	**Capacity Building Skills**	a) Ability to help others identify goals and develop to their fullest potential b) Ability to work in ways that increase individual and community empowerment c) Ability to network, build community connections, and build d) coalitions e) Ability to teach self-advocacy skills f) Ability to conduct community organizing		
5	**Advocacy Skills**	a) Ability to contribute to policy development b) Ability to advocate for policy change c) Ability to speak up for individuals and communities		
6	**Education and Facilitation Skills**	a) Ability to use empowering and learner-centered teaching strategies b) Ability to use a range of appropriate and effective educational techniques c) Ability to facilitate group discussions and decision-making d) Ability to plan and conduct classes and presentations for a variety of groups e) Ability to seek out appropriate information and respond to questions about pertinent topics f) Ability to find and share requested information g) Ability to collaborate with other educators h) Ability to collect and use information from and with community members		
7	**Individual and Community Assessment Skills**	a) Ability to participate in individual assessment through observation and active inquiry b) Ability to participate in community assessment through observation and active inquiry		

| 8 | **Outreach Skills** | a) Ability to conduct case-finding, recruitment and follow-up <br> b) Ability to prepare and disseminate materials <br> c) Ability to build and maintain a current resources inventory | | |
| 9 | **Professional Skills and Conduct** | a) Ability to set goals and to develop and follow a work plan <br> b) Ability to balance priorities and to manage time <br> c) Ability to apply critical thinking techniques and problem solving <br> d) Ability to use pertinent technology <br> e) Ability to pursue continuing education and life-long learning opportunities <br> f) Ability to maximize personal safety while working in community and/or clinical settings <br> g) Ability to observe ethical and legal standards (e.g. CHW Code of Ethics, Americans with Disabilities Act [ADA], Health Insurance Portability and Accountability Act [HIPAA])
 h) Ability to identify situations calling for mandatory reporting and follow mandatory reporting protocols <br> i) Ability to participate in professional development of peer CHWs and in networking among CHW groups <br> j) Ability to set boundaries and practice self-care <br> k) Ability to work in teams | | |

| | | l) Describe & access national & state CHW professional organizations & training resources
m) Explain the CT CHW voluntary certification policy and process for obtaining certification (including different pathways)
n) Identify and utilize tools and resources for CHW professional development
o) Describe the history, role and impact of CHWs/CHRs in improving individual and community health
p) Describe the CT CHW Scope of Practice | | |

10	**Evaluation and Research Skills**	a) Engaging in evaluating CHW services and programs b) Identifying and engaging community members as research partners, including community consent processes c) Ability to participate in evaluation and research processes including: i) Identifying priority issues and evaluation/research questions ii) Developing evaluation/research design and methods iii) Data collection and interpretation iv) Sharing results and findings v) Engaging stakeholders to take action on findings		
11	**Knowledge Base**	a) Knowledge about social determinants of health and related disparities b) Knowledge about pertinent health issues c) Knowledge about healthy lifestyles and self-care d) Knowledge about mental/behavioral health issues and their connection to physical health e) Knowledge about health behavior theories f) Knowledge of basic public health principles g) Knowledge about the community served h) Knowledge about United States health and social service systems		