C3 Project CHW Roles and Competencies Review Checklist

Use the following checklists to assess how CHW role and skills linked to CHW trainings, practice, and/or policies align with the Community Health Worker Core Consensus Project.

ROLES

Table 1: COMMUNITY HEALTH WORKER ROLES/SCOPE OF PRACTICE	
☐ Checklist for personal, programmatic, and policy review	**Community Health Worker Core Consensus Project** Roles/Scope of Practice
Role: Functions that CHWs serve in communities and the health care system. For example, CHWs provide health education. **Scope of Practice:** An all-inclusive list of roles and tasks which an occupation includes in its scope of work. The exact mix of these roles and tasks for any one individual will vary based on the needs of those served and host organizations.	
ROLE	**SUB-ROLES**
☐ 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 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 address barriers to services d. Documenting and tracking individual and population level data e. Informing people and systems about community assets and challenges
☐ 4. **Providing Coaching and Social Support**	a. Providing individual support and coaching b. Motivating and encouraging people to obtain care and other services c. Supporting self-management of disease prevention and management of health conditions (including chronic disease) d. Planning and/or leading support groups
☐ 5. **Advocating for Individuals and Communities**	a. Advocating for the needs and perspectives of communities b. Connecting to resources and advocating for basic needs (e.g. food and housing) c. Conducting policy advocacy

☐ **6. Building Individual and Community Capacity**	a. Building individual capacity b. Building community capacity c. Training and building individual capacity with peers and among CHW groups
☐ **7. Providing Direct Service**	a. Providing basic screening tests (e.g. height, weight, 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)
☐ **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

*Asterisks denote new roles from 1998-2016; several sub-roles have been expanded

C3 Project, 2018 | www.C3Project.org

LEANING TOGETHER TOWARD THE SKY | The Community Health Worker Core Consensus (C3) Project | 2

Table 2: COMMUNITY HEALTH WORKER COMPETENCIES: SKILLS

☐ Checklist for personal, programmatic, and policy review	Community Health Worker Core Consensus Project Skills

Skill: The ability, coming from one's knowledge, practice, and aptitude, to do something well. A core role or a task that must be performed may be supported by multiple skills.

SKILLS	SUB-SKILL/DESCRIPTION
☐ **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)
☐ **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 resources and overcoming barriers) b. Ability to make appropriate referrals c. Ability to facilitate development of an individual and/or group action plan and goal attainment d. Ability to coordinate CHW activities with clinical and other community services e. Ability to follow-up and track care and referral outcomes
☐ **4. Capacity Building Skills**	a. Ability to help others identify goals and develop to their fullest potential b. Ability to work in ways that increase individual and community empowerment c. Ability to network, build community connections, and build coalitions d. Ability to teach self-advocacy skills e. Ability to conduct community organizing
☐ **5. Advocacy Skills**	a. Ability to contribute to policy development b. Ability to advocate for policy change c. Ability to speak up for individuals and communities

☐ **6. 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 b. Ability to prepare and disseminate materials c. Ability to build and maintain a current resource inventory
☐ **9. Professional Skills and Conduct**	a. Ability to set goals and to develop and follow a work plan b. Ability to balance priorities and to manage time c. Ability to apply critical thinking techniques and problem solving d. Ability to use pertinent technology e. Ability to pursue continuing education and life-long learning opportunities f. Ability to maximize personal safety while working in community and/or clinical settings 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 carry out mandatory reporting requirements i. Ability to participate in professional development of peer CHWs and in networking among CHW groups j. Ability to set boundaries and practice self-care

☐ **10. Evaluation and Research Skills***	a. Ability to identify important concerns and conduct evaluation and research to better understand root causes
	b. Ability to apply the evidence-based practices of Community Based Participatory Research (CBPR) and Participatory Action Research (PAR)
	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

Asterisks denote new skills from 1998 -2016; several sub-skills have been expanded

C3 Project, 2018 | www.C3Project.org

Individuals, Families and Communities Served

ROLES

SKILLS

QUALITIES

Figure 1:
The CHWs Roles and Competencies
Support Pyramid