

Institute for Public Health Innovation

Zee Turner Center

Guide to Designing, Implementing, and Sustaining CHW Interventions

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Executive Summary

The Institute for Public Health Innovation has supported the growth of the community health worker workforce in the DC, Maryland, and Virginia region since 2011. Over the years, we have gained many lessons in designing and implementing successful CHW programs, training and managing CHW teams and financing CHW roles and initiatives. We believe CHWs are an essential grassroots public health workforce to transform the well-being of residents and improve health equity across our region and we aim to expand the reach and impact of CHWs across our region.

This guide, focused on our lessons from the VA, MD, and DC region, outlines the essential components of a comprehensive Community Health Worker (CHW) program that we have learned over the years. It covers various aspects of CHW work, including role definition, recruitment, hiring, training, supervision, evaluation, compensation, integration into care teams, caseload management, safety, and organizational support, as well as our work supporting the development of critical financial sustainability models for long-term support of the CHW workforce. This **Guide to Designing, Implementing, and Sustaining CHW interventions** encompasses fourteen components across five domains to enhance hiring practices, training, supervision, CHW workflow practices, evaluation, and organizational support.

Key areas of focus include:

- **CHW Role and Scope:** Defining the CHW role, emphasizing its holistic and person-centered approach, and differentiating it from other health professions.
- **CHW Workforce Development:** Addressing recruitment, hiring, onboarding, training, certification, and professional development strategies.
- **CHW Supervision and Evaluation:** Outlining the importance of effective supervision, performance evaluation, and career advancement opportunities.
- **CHW Compensation and Sustainability:** Exploring compensation models, funding sources, and advocacy strategies for long-term program sustainability.
- **CHW Integration and Collaboration:** Emphasizing the importance of integrating CHWs into care teams and involving them in organizational decision-making.
- **CHW Safety and Support:** Addressing safety protocols and providing necessary resources for CHWs.

By implementing these guidelines, organizations can establish effective CHW programs that improve health outcomes, reduce health disparities, and build stronger communities.

1. Who is IPHI?

Founded in 2009, the Institute for Public Health Innovation (IPHI) is the official public health institute serving the District of Columbia, Maryland, and Virginia. We are one of forty public health institutes across the

country, serving as cross-cutting resource organizations that work in collaboration with a broad range of partners to improve community and population health. Our mission is to create partnerships across sectors and cultivate innovative solutions that improve health and well-being for all populations and communities across the region, particularly those most affected by health inequities. Our work enhances the environments and conditions in which people live, age, work, learn, and play; strengthens health service systems and public policy; and builds organizational and community capacity to sustain progress. IPHI works at a systems level by forging cross-sector partnerships, developing the health workforce, pursuing policy improvements, and leading collaborative approaches that improve service systems and test innovative approaches.

IPHI is a recognized leader in developing the community health worker (CHW) workforce and designing, implementing, and evaluating CHW-based public health services Nationally and across the region. CHWs have proven effective in enhancing health outcomes, reducing healthcare costs, and mitigating disparities. Recognizing the significance of CHWs, IPHI offers its years of expertise to successfully implement high-quality CHW programming and evaluation in the region. Our partners have included state and national healthcare systems, community-based organizations, Federally Qualified Health Centers, Health Districts, state, and local government. From employment of CHWs to training and technical assistance on CHW programs to CHW network and statewide CHW Coalition development, and workforce policy design

<https://www.institutephi.org/>

2. About Zee Turner Center for Community Health Worker Workforce Development

[The Zee Turner Center for Community Health Worker Workforce Development One Pager](#)

With a unique regional perspective on CHW workforce development, in 2013, IPHI launched the Zee 'Zhilphia' Turner Center for Community Health Worker Workforce Development, a regional center for excellence that advances community health worker (CHW) practice, research, and policy. Initially named the Center for the Community Health Workforce, it was established to coordinate efforts aimed at advancing the CHW workforce throughout the interconnected regions of VA, MD, and DC. Since 2014, the Center has been active in designing CHW interventions and employing CHWs to improve health outcomes. It has convened partners, provided training, and offered technical assistance to organizations implementing or interested in building CHW programs. Additionally, the Center has supported the development of CHW associations and networks across DC, MD, and VA. It has organized conferences throughout the region to raise awareness of CHW roles, highlight the workforce's value, negotiate regional reciprocity, and discuss opportunities for support, advocacy, and workforce sustainability advancement. Our goal remains straightforward: to enhance the health of the DC, MD, and VA areas by expanding the Community Health Worker (CHW) workforce. We aim to achieve this through the advancement of CHW practice, research, and policy by providing training, technical assistance, collaboration, and advocacy.

The Zee Turner Center Priorities:

Practice

- Support the development of regional standards and scopes of practice for CHWs.
- Develop and implement training and continuing education for CHWs.
- Consult and provide technical assistance to organizations requesting help in planning, operating, evaluating, and sustaining CHW programs.

Research

- Research and find innovative CHW models.
- Serve as a clearinghouse for regional, national, and international CHW best practices.

Policy

- Convene regional stakeholders to facilitate engagement and action.
- Support & Collaborate with CHW networks across DC, MD, and VA.
- Support policy to finance and sustain the CHW workforce across the region.
- Coordinate to increase awareness and support for the CHW workforce.

Learn more about our diverse portfolio of CHW program offerings and the Zee Turner Center here:

<https://www.institutephi.org/focus-areas/community-health-workers/zee-turner-center/>

As a result of our history, experience, and support with effectively integrating Community Health Workers (CHWs) into clinical and community-based programs, IPHI successfully led a 3-year capacity-building project in collaboration with a wide range of state and local partners across Virginia. The project was funded through the Centers for Disease Control and Prevention.

<https://www.institutephi.org/chwsforahealthyva/>

3. Executive Summary

4. Introduction

Organizations define the scope of the CHW role, including that it is holistic, person-centered, and focused on understanding and addressing patients'/clients' health-related social needs. The materials should adapt evidence-based work practices and include defined durations, and processes for identifying and addressing patients' social needs and documenting CHW work.

4a. CHW APHA Definition

What is a Community Health Worker?

The American Public Health Association defines a community health worker (CHW) as a frontline public health worker who is a trusted member of and/or has an unusually close understanding of the community served. This trusting relationship enables the CHW 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.

CHW State-Specific Definitions

4b. Importance of CHWs

- **Bridge Between Communities and Healthcare Systems:** CHWs serve as trusted intermediaries, helping individuals navigate complex healthcare systems. They improve communication between patients and providers by offering culturally and linguistically appropriate support.
- **Improved Health Outcomes:** CHWs support chronic disease management, maternal and child health, and preventive care, leading to better health indicators such as reduced hospital readmissions and improved disease control.
- **Cost-Effectiveness:** By focusing on prevention and early intervention, CHWs reduce the need for expensive emergency care and hospitalizations.
- **Health Equity:** CHWs address social determinants of health (e.g., housing, food security, and education) that disproportionately affect marginalized populations.
- **Community Empowerment:** CHWs empower individuals to take control of their health through education, advocacy, and skill-building.
- **Culturally Competent Care:** As members of the communities they serve, CHWs provide care that respects and incorporates cultural beliefs and practices, fostering trust and adherence to health plans.

5. CHW Work Practice

5a. Scope of Practice

Scope of CHWs' Work in the DMV

Local Regulations and Practices Shaping CHW Work

This is a set of standards that outline the roles that the CHW performs, either in part or full and include the following:

- a. Cultural mediation among individuals, communities and health and social service systems.
- b. Providing culturally appropriate health education and information.
- c. Care coordination, case management and system navigation.
- d. Providing coaching and social support.
- e. Advocating for individuals and communities.
- f. Building individual and community capacity.
- g. Providing direct service.
- h. Implementing individual and community assessments.
- i. Conducting outreach.
- j. Participating in evaluation and research.

5b. Types of CHW Models

- [Promotora de Salud/Lay Health Worker Model](#)
CHWs are members of a target population sharing social, cultural, and economic characteristics.
- [Member of Care Delivery Team Model](#)
CHWs render direct health services collaborating with medical professionals.
- [Care Coordinator/Manager Model](#)
CHWs help people with complex health conditions navigate healthcare systems.
- [Screening and Health Educator Model](#)
CHWs deliver education to a target population.

- [Outreach and Enrollment Agent Model](#)
Similar to Health Educator model, with greater outreach and enrollment responsibilities
- [Community Organizer and Capacity Builder Model](#)
CHWs promote community action and build community support for new activities.

5c. Importance of CHW Networks and Coalitions

Importance of CHW Networks and Coalitions

IPHI has supported four regional coalition conferences in Richmond/Petersburg, Pittsylvania/Danville, Norfolk/Portsmouth, and SW Virginia to raise awareness of CHW roles and advocate for the sustainability of their workforce. These coalitions have been instrumental in addressing the social determinants of health gaps in their communities and expanding the reach of the coalitions to include local stakeholders, churches, community-based organizations, etc. to partner together in improving health equity in their regions.

CHW Regional Associations

5d. Distinctions between CHWs and Related Occupations

CHW and Similar Roles Comparative Chart

5e. Value of CHWs in Communities

Community Health Workers (CHWs) are invaluable assets in promoting health and addressing disparities within communities. They function as trusted intermediaries, bridging gaps between healthcare systems and individuals, particularly in underserved areas. By providing culturally relevant education, preventive care, and support for chronic disease management, CHWs empower individuals to take control of their health. Their roles extend beyond healthcare, addressing social determinants such as housing, nutrition, and employment, which are critical to overall well-being.

Moreover, CHWs play a significant role in reducing healthcare costs by preventing hospitalizations and unnecessary emergency visits. Their presence fosters trust in medical systems, increases access to care, and improves health outcomes, especially among marginalized populations. Through outreach, advocacy, and collaboration with healthcare providers, CHWs enhance the delivery of equitable and patient-centered care. As key contributors to public health initiatives, they strengthen the resilience and health of communities, making their inclusion in healthcare systems essential.

6. Hiring and Compensation

Organizations prioritize candidates who are from the same community and/or share life experiences with the patients/clients they will support, and who demonstrate trust-building traits like empathy and strong listening skills. The following may assist in that selection.

6a. Selection Process for CHWs

6b. Best Practices in Recruitment and Hiring

6c. Onboarding and Supervisor Training

6d. CHW Job Titles and Descriptions

CHW Job Titles and Descriptions Chart

Core Functions of CHWs in the DMV

CHW Core Competencies

6e. Compensation Models and Sustainability

CHW Compensation Recommendations

7. Training and Professional Development

Organizations prioritize supervisor candidates who have previous community health, public health, or social work experience and ensure CHWs have a single (as opposed to multiple) supervisor. They also require that CHWs meet regularly with their supervisor to review patients/client cases and receive an annual performance evaluation.

7a. Training Requirements

7b. Ongoing Training and Assessment

7c. Certification Process

Training and Certification

CHW Certifications Advantages and Disadvantages

8. Supervision and Evaluation

8a. Retention Strategies for CHWs

8b. Performance Evaluation Process

8c. Organizational Resources for CHWs

9. Integration with Care Teams

9a. Role of CHWs within Care Teams

9b. Successful Integration Strategies

9c. Caseload Management and CHW Productivity

10. CHW Safety and Support

The organization has written procedures that protect CHW safety, including procedures for tracking when CHWs are conducting home visits and processes for identifying and resolving concerns related to CHW safety.

10a. Safety Protocols for CHWs

10b. Emergency Response Guidelines

11. Organizational Support and Involvement

Organizations actively involve CHWs in decision-making processes about their role and working conditions, including compensation, training, caseloads, work practices, equipment, and supplies, as well as decision-making processes related to advancing racial and social justice and equity within the organization.

11a. CHW Involvement in Policy and Decision Making

Community Health Workers (CHWs) should be actively involved in the decision-making process by providing input on community needs, identifying relevant health issues, and shaping program design and implementation, essentially bringing the perspective of the community they serve directly to the table to ensure interventions are culturally appropriate and effectively address local concerns; this can include participating in planning meetings, providing feedback on program materials, and advocating for community priorities.

11b. Involvement of CHWs in Broader Efforts

CHWs have intimate knowledge of their community's health challenges, social determinants of health, and cultural nuances, which are crucial for informed decision-making.

12. Evaluating CHW Programs

12a. Assessment of CHW Program Outcomes

Community Health Worker Center for Research and Evaluation

[The Community Health Worker \(CHW\) Common Indicators Project: Engaging CHWs in Measurement to Sustain the Profession](#)

13. Financing Options for CHW Sustainability

13a. Funding Sources and Strategies

- **Financing options for CHW sustainability**
 - Funding Sources/Considerations
 - Medicaid: States can pay facilities that employ CHWs through Medicaid payments.
 - Grants: Grants from the federal government, foundations, and other organizations can fund CHW programs. For example, the Federal Office of Rural Health Policy within the Health Resources and Services Administration (HRSA) has supported rural CHW programs.
 - State general funds: States can use general funds to finance CHW services.
 - Reimbursement for services: CHWs can receive reimbursement for services they provide.
 - Nonprofit contributions: Nonprofits can contribute to CHW programs.
 - Insurance companies: Insurance companies can provide funding support for CHW programs.
 - Other businesses: Other businesses can provide funding support for CHW programs.
- **Goals to Consider for Securing Financing**
- **Sustainable Funding**
 - CAPGI Collaborative Approach to Public Good Investment – link to Len's info/page

- Outcome-based funding – link to QV info
- **Future of Funding Sources for CHWs Should Consider**
- **Advocating for Sustainability**
- **Advocacy Strategies**
- **Key Considerations for Sustainability**
- **Financial Reimbursement**

14. Conclusion

15. Appendices

[Community Health Worker Program Standards-A Roadmap for the Commonwealth of Virginia](#)

[Final report for the Virginia Department of Health from the Penn Center for Community Health Workers-
October 2021](#)