



Section II

Working Effectively with Community Health Workers



CENTER FOR
COMMUNITY HEALTH
ALIGNMENT

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Working Effectively with Community Health Workers

“Getting Started: Designing an Effective CHW Program” highlighted tips for getting your CHW program started. This next section will provide tips on how to best integrate Community Health Workers (CHWs) into your team and organization. When starting a new CHW program or expanding an existing program, there are a few key areas to consider. Complete the below assessment to determine where your organization can start. Note: these questions are just a starting point to assist with this work and it is okay to answer, “not sure”.

Questions to consider before starting a new CHW program or intervention?	
Q1. Has your organization identified a plan to ensure the CHW maintains their connections to the community?	Y / N Not Sure
Q2. Has your organization identified which priorities and needs CHWs can address using their qualities, roles, and skills?	Y / N Not Sure
Q3. Has your organization identified who will be a part of your CHW program (e.g., CHWs, community organizations, program participants, other team members)?	Y / N Not Sure
Q4. Has your organization clarified the scope(s) of practice of CHWs and how they will interact with others on the team?	Y / N Not Sure
Q5. Has your organization mapped out a process or workflow for the CHW program or intervention?	Y / N Not Sure

Take a moment to revisit your response to assessment question 1: “Has your organization identified a plan to ensure the CHW scope of practice maintains their connection to the community?”

If your response to this question was “No” or if your plan for your CHW program is to solely implement services within your office or health care setting, consider the core qualities, roles, and skills of CHWs (Resource: <https://www.c3project.org/>).

Community Health Workers are individuals with lived experience and/or a close understanding of the community being served. CHWs should spend time in the community – this is in fact **where** the value of CHW programs lie. Confining a CHW into an office or institutional setting limits their effectiveness, as their connection and visibility in the community help maintain important relationships and trust.



Examples of the kinds of work CHWs do in the community include visiting clients in their homes, presenting at outreach events, gathering information about local resources, conducting research, or accompanying clients to appointments for healthcare or social needs.

Even if a CHW program is based within a clinic or office, include CHW activities that will occur outside of the clinic or office when developing your workflow, process map, plan for team communication, and program evaluation plan.

There is an article on “co-opting” CHWs in the resource section that provides more perspective on not limiting the power of the CHW role.

Implementing Your CHW Program with Evaluation in Mind

Community Health Workers have a role in data collection and evaluation to show program success. Before starting your program, determine where CHWs should work and focus on (e.g., [CHW Prioritization Index](#)). Here are a few tips for your team to consider when starting a CHW program.

1. Ensure the program evaluation reflects community-based principles (e.g., examining how CHWs and community members are meaningfully engaged in healthcare and community settings).
2. Discuss the evaluation goals with key stakeholders to identify which evaluation aspects are important to them.
3. Pilot-Test and start off with “small successes” early on. Tools that may be useful during this time include [Plan-Do-Study-Act \(PDSA\) cycles](#),
4. Gather feedback, suggestions for improvement, and success stories from key stakeholders about their experiences.



Working Together Works: Outlining Roles, Responsibilities and Team Communication

Whether your CHW program is within a community-based or clinical setting, it is important to understand the roles of all members of your team. In many cases, CHWs work on multi-disciplinary teams often referred to as integrated care teams. Identifying touchpoints of each team member with clients or patients is critical for any program or service whether in a community or clinical setting.

When considering the make-up of your team, it is important to utilize a strength-based approach to maximize your overall impact. In health care, when speaking of individual roles, this is often referred to as everyone “working at the top of their licensure.” For CHWs, it means making sure the CHW can exercise their full scope of work and potential, and that the CHW role(s) support other team members to maximize their scopes.

To do this, consider mapping out each team member’s role and core job duties. It is important to develop or revise workflows or processes to determine when CHWs will engage with individuals and communities whether this be in-office or in-clinic, telephonic, telehealth, or in-person (community or home setting).

- The first place to start in developing this process or workflow is to consider the makeup of your team and how each role functions. Be sure to engage the CHWs and other team members in these important conversations.
- Map out when and how each team member works with an individual or community group, and where there are optimal opportunities for coordinating services with other team members.
- Develop a flow chart or process map to outline the activities of the CHW and how they will fit into the team’s overall workflow. This chart should be reviewed and adjusted as often needed as you make changes to the CHW program during the development and implementation processes.
- It is also important to remember to include CHWs in staff meetings and/or daily huddles.



Integrated care teams are composed of individuals with varying professional backgrounds and experiences that are all working to support people and/or communities to reach optimal health and/or well-being. Here are some possible examples of how to delineate team member roles:

Working in a Health Care System

- **CHWs** connect with patients who need extra support or help with their healthcare, to help with things like:
 - Helping the client make a plan for their health priorities
 - Engaging clients with additional resources and information
 - Following up with patients about their care plan
 - Providing feedback to the clinical team to improve quality of care
- **Patient Service Representatives** are in charge of things like
 - Making appointments
 - Identifying and following up with patients that no-show
 - Tracking insurance and billing information
 - Checking patients in and out of their appointments
- **Clinical Social Workers** see patients with mental illness or emotional and/or behavioral disturbances for services like ~
 - Assessment and diagnosis
 - Counseling and treatment
- **The medical care team (certified medical assistants, nurses, nurse practitioners, physicians)** cover the medical care, including ~
 - Taking medical history
 - Diagnosing and treating physical conditions
 - Reconciling and prescribing medications

Working in a Community Setting

- **CHWs** help link individuals to resources, provide culturally appropriate health education and information.
- **Eligibility Counselors** screen individuals for program or service eligibility, assist individuals with completing applications and required forms.
- **Social Workers** provide support to individuals & families by assessing and reviewing situations.
- **Health Educators** teach people about behaviors and promote well, provide health education and awareness, develop, and promote health programs.
- **Resource Navigators** complete needs assessments, helps individuals access resources, facilitate programs.
- **Outreach Specialists** help organizations to promote services to the community.
- **Volunteers** lend a helping hand based on the needs of the organization.



Clearly establishing each person's role can not only allow them to perform at their highest level but avoid frustrating duplication of work and maximize the team's efficiency and effectiveness.

Community Health Workers in Action: Resources that Highlight the Impact of CHWs on Teams

1. [**Integrating Community Health Workers into Health Care Teams Without Coopting Them**](#) is an article that provides a framework for integrating CHWs into healthcare systems.
2. The article, [**In Focus: Integrating Community Health Workers into Care Teams**](#), reports on health care organizations that have integrated CHWs into multidisciplinary teams and shares some of their successes.
3. The CDC's [**Integrating Community Health Workers on Clinical Care Teams and in the Community**](#) provides evidence of effectiveness and impact on integrating CHWs, considerations for implementation, and stories from the field.
4. [**Supporting the Integration of Community Health Workers into Health Care Teams in California**](#) is an article that provides a framework for how to best utilize and integrate CHWs and promotores into emerging care models in California.
5. [**Community Health Workers: A Key Role on the Collaborative Care Team**](#) article shares information on promoting collaborative team-based care and how CHWs bring value to the collaborative team-based model.
6. [**Strategies to Improve the Integration of Community Health Workers into Health Care Team: "A Little Fish in a Big Pond"**](#) shares perspectives from CHWs on their integration into healthcare teams.

Technical Assistance Support

We are here to assist. Check out how CCHA can [**support your organization**](#).



Acknowledgments

The Center for Community Health Alignment strongly believes that when attempting to co-create strategies and solutions with our community, formal education is not enough. In addition to subject matter expertise, we must have folks with extensive lived experience at the table to provide much needed context to the topics being discussed. This toolkit has been developed in collaboration with Community Health Workers (CHWs) and CHW allies with extensive expertise in planning, implementing, and showing the impact of the CHW model. Thank you to all the CHWs and CHW Allies that contributed to the creation of this best practice toolkit section!

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